Manage Workday

Product Summary

December 10, 2025

Contents

Manage Workday

In this book, you can learn about setting up and managing Workday tenants.

Tenant Configuration

Tenant Setup

Create ID Definitions and Sequence Generators

Prerequisites

Security:

- *Set Up: Company General* domain in the Common Financial Management functional area.
- *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.
- *Set Up: System* domain in the System functional area.

Context

ID definitions specify the format of IDs that Workday generates for various business objects and fields. With the [seq] variable, the ID definition becomes a sequence generator. A sequence generator identifies people, positions, incidents, or fields with a number that is unique within a specified time period.

Workday provides 2 types of sequence generators:

- Sequence generators that generate sequences that are unique, but might have numbering gaps. These sequence generators enable you to:
    - Restart the sequence at the beginning of the day, month, or year, and at a specified sequence number.
    - Specify a behavior should the sequence overflow.

  You create these sequence generators by accessing the Create ID Definition / Sequence Generator task.
- Sequence generators that generate sequences that never have gaps. Since these sequences are gapless, you can't select a restart period or overflow behavior. You might use this type of sequence generator when it's important to maintain the sequence, such as when your auditors require it. You create these sequence generators by accessing the Create ID Definition / Gapless Sequence Generator task.

You can create as many ID definitions and sequence generators as you need. Access the Edit Tenant Setup tasks to select which ones to use for invoices, orders, receipts, employees, beneficiaries, and so on.

Note: You can create both sequence generator types, but Workday determines which types you can specify on an Edit Tenant Setup task for a given situation. Example: You can't use gapless sequence generators for spend authorizations, but can use them for miscellaneous payment requests on the Edit Tenant Setup - Financials task.

You can override some selections for a specific company by accessing the Edit Company ID Definitions task. If you don't specify an ID definition, Workday generates its own internal ID codes.

Sequence Generator IDs assign names to sequences used in Workday applications. You can view a specific ID definition in the View ID Definition / Sequence Generator and View ID Definition / Gapless Sequence Generator reports.

Steps

1. Access 1 of these tasks to create the type of sequence generator that you require:
    - Create ID Definition / Sequence Generator
    - Create ID Definition / Gapless Sequence Generator

    You can also select the sequence generator creation task directly in fields on the Edit Tenant Setup task where they're used. Only the task for the type of sequence generator that Workday allows for that field displays in the drop-down list.
2. In the Increment Sequence ID By field, enter a nonzero value by which the sequence number increases each time Workday generates a new ID.
3. (Optional) Use Padding to indicate the number of digits present in the sequence.

    Enter a large enough padding value so that the sequence doesn't encounter an overflow condition. Workday recommends a padding value of at least 6.

    If the sequence exceeds the number of digits you enter here, the Sequence ID Overflow Behavior setting determines the next number in the sequence.

    If you enter a zero, or don't enter a value in the Padding field:
    - The sequence number increases indefinitely.
    - Workday populates Sequence ID Overflow Behavior with Automatically Ignore Padding.
4. In the Sequence ID Format field, specify a format for the identifier.

    You can use any text string with these 4 special variables. The date-related values represent the date when the task generates the ID.

Option	Description
[seq]	The sequence number, which: • Increases by the value specified in the Increment Sequence ID By field. • Contains the number of digits specified in the Padding field. Workday uses a separate sequence for each ID definition that uses this variable.
[day]	Day of the month in two-digit format, 01 - 31.
[month]	Month in two-digit format, 01 - 12.
[year]	Year in four-digit format. Example: 2020.

The Example Sequence field displays the next sequence ID, based on the Sequence ID Format and other current sequence generator settings.

Note: If you set the Restart Frequency interval, ensure that the generated sequence number is unique by including the specific time period in the format. Example: If the Restart Frequency time period is *Month*, include [month] and [year] in the format. Make sure that the padding value is large enough that the sequence generator doesn't encounter an overflow condition during the time period. The Restart Frequency field isn't available for gapless sequence generators.

Avoid white space in the format if the sequence numbers might generate URLs. Example: Some external career sites add the Job Requisition ID (generated during a Job Requisitions Integration) to the job posting URL. If a site doesn't encode special characters, such as spaces, the result is an invalid URL.

For these business objects, Workday uses the sequence generator ID you set up as the integration reference ID:

- Advance Ship Notice
- Purchase Order
- Purchase Order Acknowledgment
- Receipts
- Request for Quote (RFQ) Awards
- Requisition
- RFQ Response

For the business objects, if:

- You have multiple companies.
- You want Workday to generate IDs in numeric order for each company.

Enter numbers with a wide gap in between the Last Sequence Used for the sequence generator for each company. Access the Edit Company ID task to assign these unique sequence generators to companies in your tenant.

Example: An administrator enters 1000001 in the Last Sequence Used field for the sequence generator for Company A. They also enter 2000002 in the Last Sequence Used field for the sequence generator for Company B.

The result is separate sequence generators create IDs in numeric order on purchase orders for each company:

PO#1 - ID of Company A: CA-PO-2018-09-1000001

PO#2 - ID of Company A: CA-PO-2018-09-1000002

PO#3 - ID of Company B: CB-PO-2018-09-2000002

PO#4 - ID of Company B: CB-PO-2018-09-2000003

Note: Workday combines these sequence generators to provide IDs across companies if you:

- Keep the Last Sequence Used field the same.
- Only provide a small gap between numbers.

The result is gaps between ID numbers on procurement documents for companies.

Example: An administrator enters the same number in the Last Sequence Used field for each sequence generator for Company A and Company B.

The result is the same sequence generator provides ID numbers generated across companies on their purchase orders:

PO#1 - ID of Company A: PO-2018-09-00001

PO#2 - ID of Company B: PO-2018-09-00002

PO#3 - ID of Company B: PO-2018-09-00003

PO#4 - ID of Company A: PO-2018-09-00004

5. (Optional) To reset the [seq] value to an initial value at regular time intervals, consider:

Option	Description
Restart Frequency	The time interval when the [seq] variable starts again at the Restart Number value.

Option	Description
	The options are *Day*, *Month*, or *Year*; leave the field blank if you want [seq] to be unique within this ID definition. Days start at 12:01 AM. Months start at 12:01 AM on the first of that month. Years start at 12:01 AM on the first of January. If you set a Restart Frequency and set up Workday to continue a sequence from a different ID generation system, you must set: • A valid Last Date Used. • A nonzero Last Sequence Used.
Restart Number	The value you want [seq] to start at when you first use the ID definition, and every time the sequence restarts.
Time Zone Usage	An alternate time zone on which to base the interval specified in the Restart Frequency field. This value doesn't indicate when the ID generation actually occurs. Workday uses this value only to localize the date to the specified time zone. If you don't specify a time zone, Workday uses Pacific Standard Time/Pacific Daylight Time (PST/PDT).

These fields aren't available for gapless sequence generators.

6. (Optional) In the Sequence ID Overflow Behavior field, configure how you want Workday to handle potential sequence identifier overflow conditions. As you complete the field, consider:

Option	Description
Allow Overflow with Truncated Sequences	Workday truncates the most significant digit of the sequence number when an overflow condition occurs. Example: With a Padding value of 3, the next sequence number after 999 is 1000, but the 1 gets truncated, so the next value displays as 000.
Automatically Ignore Padding	The sequence generator ignores the Padding value when an overflow condition occurs. Example: With a Padding value of 3, the next sequence number after 999 is 1000.

If the Padding value is a zero, Workday automatically selects the Automatically Ignore Padding option. If the padding is a value other than zero, you can select either option. Workday recommends Automatically Ignore Padding, as the sequence generator can produce duplicate numbers that can impact downstream systems when it doesn't ignore padding. Example: A sequence generator for ID cards that only has space for 3 digits.

You can't select the Sequence ID Overflow Behavior for gapless sequence generators.

7. (Optional) In the Override Tenant Setup Overflow Notification Group field, select security groups for this sequence generator that will override the default overflow notification security groups. Workday automatically sends a notification to the overflow notification security groups when the

sequence reaches 80% of the limit imposed by the Padding value. It then sends out notifications in 5% increments afterward.

If you don't select security groups in this field, Workday sends these overflow notifications to:

- The security groups that you select in the Default Sequence Generator Notification Group field on the Edit Tenant Setup - System task.
- The default security groups that Workday specifies for overflow notifications, if you don't select default overflow notification security groups on the Edit Tenant Setup - System task.

8. (Optional) If you previously used a different ID generation system and you want Workday to continue that sequence, consider:

Option	Description
Last Sequence Used	The last sequence number used in your previous ID generation system.
Last Date Used	The date on which your previous ID generation system generated the last sequence number.

Once Workday starts using the new sequence generator, it no longer uses these 2 fields.

If you specify Last Date Used and an interval for Restart Frequency, Workday compares the current date and restart frequency. It then sets the sequence number accordingly. Example: If you specify:

- 45 for the Last Sequence Used.
- May 15, 2020 as the Last Date Used.
- *Month* as the Restart Frequency.
- 5 for Increment Sequence ID By.
- 1 for the Restart Number.

The initial sequence number for the sequence generator will be:

- Fifty (50) if the current date is in May.
- One (1) if the current date is in June.

9. (Optional) Select the Low Volume check box to ensure that sequences generated by the sequence generator don't have gaps.

Select the check box when you experience both of these situations:

- The sequence that Workday generates isn't used in high volume transactions. Example: Integration Sequencing.
- You experience unwanted gaps in the generated sequence.

If you'll use the sequence generator in a scramble method to scramble tenant data, don't select the Low Volume check box.

10. (Optional) In the Web Service section, enter a meaningful name in the Reference ID field. You can use this ID to identify specific sequences in Workday Financial Management, Payroll, and HCM applications. See the application documentation for more information on how your specific application uses this field.

Next Steps

You can run the Sequence Generator Padding Report to monitor sequence generators for potential overflow issues. For each sequence generator, the report displays a percent usage metric that indicates how close the current sequence number is to the maximum sequence number allotted. The report also displays the overflow behavior and notification groups for each sequence generator.

Related Information

Tasks

Steps: Scramble Tenant Data

Reference

Reference: Edit Tenant Setup - System on page 164

Workday Community: Sequence Generator Padding FAQ

Concept: ID Definitions and Sequence Generators

ID Definitions

ID definitions specify the format of identifiers (IDs) that Workday generates for various business objects. You can select default ID definitions for invoices, orders, receipts, employees, beneficiaries, and so on, by accessing the Edit Tenant Setup tasks. If you don't select an ID definition, Workday generates its own internal ID codes.

Sequence Generators

Sequence generators are a type of ID definition. They identify people, positions, or incidents by using a unique number for a specified time period.

You can view a specific ID definition or sequence generator in the View ID Definition/Sequence Generator report.

You can run the Sequence Generator Padding Report to monitor sequence generators for potential overflow issues. The report displays a percent usage metric that indicates how close the current sequence number is to the maximum sequence number allotted. The report also displays the overflow behavior and notification groups for each sequence generator.

For these business objects, Workday uses the sequence generator ID you set up as the integration reference ID:

- Advance Ship Notice
- Purchase Order
- Purchase Order Acknowledgment
- Receipts
- Request for Quote (RFQ) Awards
- Requisition
- RFQ Response

If you have multiple companies, you can make Workday generate distinct IDs in numeric order for the business objects of each company. You can override the default ID definition for a specific company by accessing the Edit Company ID Definitions task. You can distinguish companies by entering a wide gap between the Last Sequence Used for the sequence generator of each company. You can access the Edit Company ID Definitions task to assign these unique sequence generators to companies in your tenant.

Example: An administrator enters 1000001 in the Last Sequence Used field for the sequence generator of Company A. They also enter 2000002 in the Last Sequence Used field for the sequence generator of Company B.

The result is that separate sequence generators create IDs in numeric order on purchase orders for each company:

PO#1 - ID of Company A: CA-PO-2018-09-1000001

PO#2 - ID of Company A: CA-PO-2018-09-1000002

PO#3 - ID of Company B: CA-PO-2018-09-2000002

PO#4 - ID of Company B: CA-PO-2018-09-2000003

Note: If you keep the Last Sequence Used field the same for each company, or only provide a small gap between numbers, Workday merges the sequence generators to provide IDs across companies. This merge results in gaps in the ID numbers on the procurement documents for each company.

Example: An administrator enters the same number in the Last Sequence Used field for the sequence generator of both Company A and Company B.

The result is that the same sequence generator provides ID numbers across companies on their purchase orders:

PO#1 - ID of Company A: PO-2018-09-00001

PO#2 - ID of Company B: PO-2018-09-00002

PO#3 - ID of Company B: PO-2018-09-00003

PO#4 - ID of Company A: PO-2018-09-00004

Gapless Sequence Generators

A sequence generator can leave gaps if you roll a transaction back. A gapless sequence generator has a built-in mechanism to prevent these gaps.

You can create a gapless sequence generator using the Create ID Definition/Gapless Sequence Generator task.

Related Information
Concepts
Concept: Tenant Setup

Concept: Opt-In Features

Workday delivers certain features so you can enable and disable them before they become automatically available in a later update. You can test these features and prepare your users for upcoming changes. Example: When Workday significantly redesigned the user interface of the home page, customers could opt in and out of the feature before Workday delivered it as automatically available.

Maintain Feature Opt-Ins Report

You can access the Maintain Feature Opt-Ins report to enable or disable features in your preview or production tenants.

You might not have the same features listed on the report in both your Preview and Production tenants. Example: When a feature is only available for Preview tenants, you won't see the row on the report in your production tenant.

When the feature is automatically available in all tenants, Workday removes the row from the report.

Reference: Edit Tenant Setup - Assistant

You can use the Edit Tenant Setup - Assistant task to configure information and actions workers can access in Workday Assistant. It can take up to 5 minutes for changes to occur in Assistant.

With the exception of Staffing options, we automatically enable all features supported by your tenant when you set up Workday Assistant. To disable a feature in Workday Assistant, select the check box for that feature on the Edit Tenant Setup - Assistant task.

Examples:

- To disable workers from submitting time off requests in Workday Assistant, check the Disable Request Time Off check box.
- If you disable anytime feedback for your tenant, Workday recommends also disabling Feedback options for Workday Assistant. Assistant won't support those Feedback options, but they may still display in Assistant's Show available capabilities list and confuse users.

Note: Workday Assistant enables many of the actions workers can access in Workday Everywhere. When you disable actions on this task, you also disable those actions in Workday for Microsoft Teams and Workday for Slack.

You can manage tenant-wide settings for Workday Assistant in these areas:

- Worker Data
- Time Tracking on page 19
- Time Off
- Staffing
- Procurement
- Productivity on page 20
- Team
- Personal Data
- Workday Help on page 22
- Job Requisitions on page 23
- Projects on page 23
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- Feedback on page 24
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- Recruiting on page 25
- Custom Help Contact
- Custom Targeted Guide Intents
- COVID-19 Notice on page 27

Worker Data

Option	Description
Disable Worker Information	When enabled, provides a worker's: • Employee ID • Email address • Hire date • Location • Manager • Phone number • Title • Workspace
Disable Manager	When enabled, provides a worker's manager's name.

Time Tracking

Option	Description
Disable Submit Time	When enabled, completes the Submit My Time task.

Time Off

Option	Description
Disable Request Time Off	When enabled, completes the Request Time Off or Request Absence task.
Disable View Time Off Balance	When enabled, completes the Time Off Balance report by providing available balances for all types of time off plans configured.
Disable View Holiday Schedule	When enabled, provides holiday calendar information.
Disable Correct Time Off	When enabled, completes the Correct Time Off task.

Staffing

Note: You can only enable 1 of these Change Job options.

Option	Description
Enable Change Job Templates	When enabled: • Displays a clickable list of job change templates. • Links you to the Start Job Change task in Workday when you select a template. • Automatically populates the What do you want to do? field for your selected template. See ../../../human-capital-management/staffing/cpl1612233420786.dita.
Enable Change Job	When enabled, provides a link to the Change Job business process in Workday.

Procurement

Option	Description
Disable Find Requisitions	When enabled, allows workers to view their current orders.

Productivity

Option	Description
Disable Drive	When enabled, provides a link to Workday Drive if users have access to the Drive security domain.

Team

Workday checks the My Direct Reports report data source to determine who has access to Team intents in Assistant. To protect worker data, Workday recommends that you only secure manager roles to My Direct Reports.

Option	Description
Disable View Team Members	When enabled, provides a list of team members.
Disable View Team Anniversaries	When enabled, provides a list of team members and their work anniversary dates.
Disable View Team Hire Dates	When enabled, provides a list of team members and their hire dates.
Disable View Team Birthdays	When enabled, provides a list of team members and their birthdays.
Disable View Team Time In Position	When enabled, provides a list of team members and the amount of time they've been in their position.
Disable View Team Promotion Dates	When enabled, provides a list of team members and their most recent promotion dates. Requires access to Talent Optimization.
Disable View Team Time Off	When enabled, provides a list of team members and their approved time off dates.
Disable View Team Clock Status	When enabled, provides a list of team members and when they've checked in or out for work. Requires access to Time Tracking.

Personal Data

Option	Description
Disable What is My Location	When enabled, workers can view their work location by asking Assistant.
Disable What is My Title	When enabled, workers can view their job title by asking Assistant.
Disable Who is My Manager	When enabled, workers can view their manager and Supervisory Organization through Assistant.
Disable What is My Birthday	When enabled, workers can view their birthday by asking Assistant.
Disable What is My Hire Date	When enabled, workers can view their Hire Date by asking Assistant.
Disable What is My Anniversary	When enabled, workers can view their Hire Date anniversary by asking Assistant.
Disable What is My Time in Position	When enabled, workers can view how long they've held their current position by asking Assistant.
Disable What is My Promotion Date	When enabled, workers can view their promotion dates by asking Assistant.
Disable What is My Employee ID	When enabled, workers can view their employee ID by asking Assistant.
Disable What are My Organization Details	When enabled, workers can view their business limit by asking Assistant.

Option	Description
Disable What is my Email	When enabled, workers can view their email address by asking Assistant.
Disable What is my Phone	When enabled, workers can view their phone number by asking Assistant.
Disable Change My Personal Info	When enabled, Assistant can link workers to the Change My Personal Information task.
Disable Change My Gender Identity and Sexual Orientation	When enabled, Assistant can link workers to the Change My Personal Information task.
Disable Change My Place of Birth	When enabled, Assistant can link workers to the Change My Personal Information task.
Disable Change My Date of Birth	When enabled, Assistant can link workers to the Change My Personal Information task.
Disable Change My Race/Ethnicity	When enabled, Assistant can link workers to the Change My Personal Information task.
Disable Change My Nationality	When enabled, Assistant can link workers to the Change My Personal Information task.
Disable Change My Marital Status	When enabled, Assistant can link workers to the Change My Personal Information task.
Disable Change My Contact Info	When enabled, Assistant can link workers to 1 of these tasks: • Change My Home Contact Information • Change My Work Contact Information
Disable Change My Legal Name	When enabled, Assistant can link workers to the Change My Legal Name task.
Disable Change My Preferred Name	When enabled, Assistant can link workers to the Change My Preferred Name task.
Disable Change My Photo	When enabled, Assistant can link workers to the Change My Photo task.
Disable Change My Emergency Contacts	When enabled, Assistant can link workers to the Change My Emergency Contacts task.
Disable View My Worker Information	When enabled, workers can view their worker information such as their title, manager, and employee ID by asking Assistant.

Workday Help

Option	Description	More Information
Disable Workday Help Case Creation	When enabled, creates and submits a case. Requires access to Workday Help.	Concept: People Experience on page 1220
Disable Workday Help Articles	When enabled, provides links to available articles relevant to	Concept: People Experience on page 1220

Option	Description	More Information
	your search. Requires access to Workday Help.	
Disable Workday Help Intelligent Answers	When enabled and workers ask questions in Workday Assistant, uses machine learning to provide: • Quick answers sourced from relevant knowledge base articles. • Previews of and links to the relevant knowledge base articles. • Opportunities for workers to give feedback about the helpfulness of the answers. Example: A worker types "How long is paternity leave?" into Workday Assistant. Intelligent Answers either sources and displays the answer ("12 weeks"), or links to a knowledge base article where the worker will likely find the answer, such as an article called *Maternity and Paternity Leave*. Then, the worker can select one of two buttons: This was helpful or This was not helpful.	

Job Requisitions

Option	Description
Disable In-Progress Job Requisition Events	When enabled, provides a list of your in-progress Job Requisition events. Workday Assistant provides a link to the event, as well as details including: • Awaiting actions. • Creation date. • Supervisory organization. • Who's up next.

Projects

Option	Description
Disable Find Projects	When enabled, provides a list of projects you have access to, as well as details including: • Project start and end dates.

Option	Description
	• Project status.

Learning

Option	Description
Disable View Learning Home	When enabled, provides a link to Learning Home.
Disable View My Required Content	When enabled, lists up to 5 of your required courses and their due dates, and provides a link to your full Required Learning report.
Disable View My Learning Transcript	When enabled, provides a link to your Learning transcript.
Disable Continue Learning Content	When enabled, lists up to 5 of your enrolled courses and their due dates, and provides a link to your Continue Learning dashboard.
Disable View My Team's Learning Status	When enabled, provides a link to your My Team's Learning report.
Disable View All Content	When enabled, provides a link to the Browse Learning report.
Disable Enroll in Content	When enabled, provides a link to the Browse Learning report.

Feedback

Option	Description
Disable View Feedback Received	When enabled, provides a link to the View Feedback Received report.
Disable Get Feedback on Self	When enabled, provides a link to the Get Feedback on Self task.
Disable Give Feedback	When enabled, provides a link to the Give Feedback task.
Disable Get Feedback on Worker	When enabled, provides a link to the Get Feedback on Worker task.
Disable View Feedback Requested	When enabled, provides a link to the Feedback Requested report.

Goals

Option	Description
Disable View My Goals	When enabled, provides a link to the My Goals report.
Disable View My Team's Goals	When enabled, provides a link to the My Team's Goals report.
Disable Add Goals to Employees	When enabled, provides a link to the Add Goal to Employees task.

Option	Description
Disable View My Organization Goals	When enabled, provides a link to the View Organization Goals report.
Disable Manage Organization Goals	When enabled, provides a link to the Manage Organization Goals task.

Performance Reviews

Option	Description
Disable View Performance Review	When enabled, provides a link to the most relevant of these options based on your request: • My Reviews report • My Team's Performance Reviews report • Start My Performance Review task • Start Performance Review for Employee task Example: If you search *last year's self evaluation*, Assistant links you to the My Reviews report.

Recruiting

Option	Description
Disable Create Job Requisition	When enabled, provides a link to the Start Job Requisition or Create Job Requisition task, depending on your tenant configuration.
Disable Create Referral	When enabled, provides a link to the Refer a Candidate task.

Custom Help Contact

Option	Description
Contact Type, Email, URL, Phone Number	Select a contact type and enter an email address, phone number, or site URL to add custom contact information to the end of Assistant help messages when users request help.

Custom Targeted Guide Intents

For each Guide Intent, you can customize Workday Assistant responses to users by selecting 1 of these Destination Options:

Option	Description
Override Default Workday Task	Provides a link to a Workday task or custom report configured to be the appropriate location for that action.
External URL	Provides a link to an external URL configured to be the appropriate location for that action, and the security group that has access.

Option	Description
None of the above	Provides a link to the default Workday task for completing that action.

When you select the *None of the above* Destination Option, Workday automatically directs users to these destinations:

Option	Description
401K	When enabled, provides workers based in the United States with a link to the Retirement Savings Elections report in Workday.
Approve Timesheet	When enabled, provides a link to the Review Time report in Workday.
Bonuses	When enabled, provides a link to the Bonus and One-Time Payment History report in Workday.
View a Candidate's Status	When enabled, provides a link to the My Candidates report in Workday.
Check In	When enabled, provides a link to the Check In task in Workday.
Check Out	When enabled, provides a link to the Check Out task in Workday.
Dependents	When enabled, provides a link to the Dependents report in Workday.
Edit W4	When enabled, provides workers based in the United States with a link to the Withholding Elections report in Workday.
Enter Time Block	When enabled, workers can enter their time blocks for that day.
Expense Reimbursements	When enabled, provides a link to the My Expense Reports report in Workday.
Find Jobs	When enabled, provides a link to the Find Jobs report in Workday.
Insurance Policies	When enabled, provides a link to the Benefit Elections report in Workday.
Request Reference Letter	When enabled, provides a link to the Request Reference Letter task in Workday.
Total Rewards	When enabled, provides a link to the Total Rewards report in Workday.
View Direct Deposit	When enabled, provides a link to the Payment Elections report in Workday.
View Download Tax Forms	When enabled, provides a link to the My Tax Documents report in Workday.
View Payslips	When enabled, provides a link to the My Payslips report in Workday.

COVID-19 Notice

Option	Description
Enable COVID-19 Notice Message Title, Message, Link Text, URL	Enter a message and site URL to provide information, and a link to resources related to COVID-19, in an Assistant message when users submit a related question.

Related Information

Concepts

Setup Considerations: Workday Assistant

Reference

2021R2 What's New Post: Workday Assistant for In-Progress Job Requisitions

2021R1 What's New Post: My Info in Workday Assistant

2021R1 What's New Post: Workday Assistant for Change Job Templates

Reference: Edit Tenant Setup - Business Processes

Manage tenant-wide settings for business processes.

Option	Description	More Information
ID Generator for Requests	Select an ID generator that Workday uses to create a sequential request ID. You can create your own ID generator using the Create ID Definition / Sequence Generator task. If this field is blank, Workday assigns an ID code to this business object. Note: When generating a request ID, Workday first checks if an ID generator is configured on the request type. If there isn't an ID generator configured on the request type, Workday checks the tenant setup and uses that ID generator configuration. If neither the request type nor the tenant setup has an ID generator configured, the request isn't assigned a request ID and it remains blank.	Create ID Definitions and Sequence Generators
User for Business Process Time Delay Background Processes	The Workday account to associate with business process steps that have built-in delays.	Maintain Step Delay on page 1015
User to Perform Automated Business Process Actions	Select a user that the *Auto-Manage Businesses Process* service step uses to perform automated actions. You must select a user on the prompt in order for the *Auto-Manage*	Steps: Set Up Auto-Manage Business Processes Service Step on page 1049

Option	Description	More Information
	Business Processes service step to run successfully.	
User to perform Orchestration Launches	To configure a business process to automatically launch an orchestration when it's canceled or rescinded, specify an individual with the appropriate permissions to access fields and perform actions required by the orchestration.	Launch Orchestrations on Business Process Cancel or Rescind
Current Environment	The environment of your tenant.	
Step Delay Schedule Restrict to Environments	Select the environments in which the *Business Process Resume Delayed Steps* background process runs in your tenant. If you don't specify environments, the background process runs in all of your tenant environments.	Maintain Step Delay on page 1015
Enable My Tasks Archive for Terminated Employees	Select to enable terminated employees to view events on the Archive tab of their My Tasks.	
Rescind and Cancel Confirmation Page Threshold	Sets the number of canceled or rescinded business process events that can occur before you must confirm that you're canceling or rescinding the business process. When you don't set a default value, Workday uses 25 events by default. Threshold only applies to: • Parent processes that spawn multiple child processes, such as *Change Benefits for Open Enrollment*. • Organization-related business processes, including *Initiate Compensation Review Process* and *Start Performance Review*. Canceling parent business processes results in the cancellation of multiple child events. Threshold doesn't apply when you mass cancel or mass	

Option	Description	More Information
	rescind a stand-alone business process.	
Subevent Threshold	If the number of subevents is below this threshold, Workday: • Initiates automatic error collection. • Displays the process history of the event. You can adjust this threshold for larger or smaller events to trigger Workday to display all errors and the complete process history. To view errors for events with more subevents than the specified threshold, select Business Process > View Additional Errors from the related actions menu of the event. Run the Event Process History report to view events with more subevents than the specified threshold.	
Users Can Delegate Tasks To	You can select more than 1 option: • *Anyone*: Any workers with a Workday account. • *Peers*: Workers in your supervisory organization only. When you select *Peers*, you can't delegate tasks to workers in other supervisory organizations in your supervisory organization hierarchy. • *Subordinates*: Subordinates in your supervisory organization hierarchy. When you delegate a task, you can drill down on the organization hierarchy when selecting a subordinate. In the Subordinates by Supervisory Organization prompt on the Delegate	Concept: Business Process Task Delegation on page 1079

Option	Description	More Information
	Task task, we display subordinates in prompt folders. When you drill down on a folder, we display workers for the organization. • *Superiors*: Superiors in your management chain. Example: You can delegate to your manager or to your manager's manager. Setting only relates to the supervisory organization hierarchy, not the worker's security.	
Require End Dates	Select to require an end date for the requested delegation. Setting applies to My Tasks delegations only and not to single-task delegations.	
Disable Comments	Select to suppress the Comment field on the business process toolbar. Workday will no longer record or display comments from that time onward. Doesn't apply to actions that require a reason, such as: • *Manual Advance* • *Correct* • *Deny* • *Cancel* • *Rescind* • *Add Approvers* • *Send Back* Updating this setting might impact the Disable Comments setting on the business process security policy. When comments are enabled at tenant level, users can choose to disable comments at the business process security level. When comments are disabled at tenant level, any changes at the business process security level have no impact and comments are always disabled.	

Option	Description	More Information
Enable Attachments	Select to enable users in specified security groups to upload attachments from the business process toolbar for all business processes for which Workday has configured attachments. Updating this setting might impact the business process security policy if no changes are made directly to the Enable Attachments setting on the business process security policy. When changes are made to the Enable Attachments setting on the business process security policy: • Workday always honors the Enable Attachments setting on the business process security policy. • The setting at tenant level will have no impact. When you make changes to the Edit Tenant Setup - Business Processes task, the business process security policy audit trail doesn't display any changes made to the Edit Tenant Setup – Business Processes task. Similarly, when you make changes to the business process security policy, the Edit Tenant Setup - Business Processes audit trail doesn't display changes made to the business process security policy. Workday recommends that you review the audit trails for the Edit Tenant Setup - Business Processes task and business process security policies to view all changes.	Steps: Enable Attachments on an Individual Business Process on page 1051
Enable Advancing Unassigned Tasks	Select to advance unassigned business process tasks to the next step or to completion. To manually advance a business process, the:	Concept: Business Process Management

Option	Description	More Information
	• Business process must allow manual advance. • Manual Advance action in the Who Can Do Actions on Entire Business Process section of the business process security policy must have at least 1 security group.	
Apply Routing Restrictions during Delegation	Select to apply business process routing restrictions to delegates. When routing restrictions prevent Workday from routing a business process to a delegate, Workday routes the business process to an alternate delegate. You can select an alternate delegate when you manage delegation settings. When you clear the Apply Routing Restrictions during Delegation check box and there are alternate delegates configured on manage delegation settings, Workday displays a confirmation page. If you proceed to clear the check box, Workday removes alternate delegates from manage delegation settings. Alternate delegates won't receive delegated items to act on. If you enable the check box, the Alternate Delegate field isn't required in the *Put Business Process Delegation* web service.	Concept: Business Process Delegation
Enable Enhanced Position-Based Approval Chain Routing	Select to route *Approval Chain* and *Consolidated Approval Chain* steps by the management hierarchy of a supervisory organization using the enhanced Position-Based Approval Chain Routing functionality. When a person reports to 1 or more managers in their position, Workday consistently evaluates approvers in the approval level and routes the business process step.	Concept: Approval Chain Routing

Option	Description	More Information
	Workday recommends that you select a constrained role-based security group for *Approval Chain* and *Consolidated Approval Chain* steps when you enable the Enable Enhanced Position-Based Approval Chain Routing check box.	
Return Event Status As Created When Empty	Select to opt into displaying a Created status for business process events that have an empty status. When you select the check box, we display a Created status on: • The Full Process Record. • The View Event page. • Custom reports. Some report fields might return a Created status when you use them in reports. Example: The Status report field. You might notice unintentional behavior if you don't select the check box. Example: If you update information while completing the steps on the *Change Job* business process, we display the new value but don't indicate what changed or display the previous value. Workday recommends that you only select the Return Event Status As Created When Empty check box if business process events in your tenant currently returns a status of Created when the status is empty and you want to continue to view this status on events. By default, the check box isn't selected.	
Change Display Preference in Generate Document	Select to display or hide the Change Display Preferences button in *Generate Document* business process steps.	

eSignature Configuration

Option	Description	More Information
Remove documents awaiting eSignature when Document is Canceled	Select to remove documents awaiting signature when you cancel or rescind a business process containing a *Review Documents* step configured for Adobe Sign. Note: To remove documents from the Adobe Sign server, you must sign a data retention agreement with Adobe.	Set Up Adobe Sign on page 1337
Disable Adobe Sign Completion Email Notifications for Production Tenants	Select to suppress email notifications when someone signs a document using Adobe Sign.	• Set Up Adobe Sign on page 1337 • Reference: Adobe Sign Email Notification Settings on page 1342
Enable Adobe Sign Completion Email Notifications for Non-Production Tenants	By default, the recipient does not receive Adobe email notifications after signing Adobe Sign documents that were distributed through a *Review Documents* step business process in non-Production tenants. Select this check box to enable Adobe Sign completion email notifications. This setting is applied to Sandbox/ Implementation (SBOX/IMPL) tenants. After changing this setting in Production tenants, and to apply the same change in Sandbox, you must first refresh Sandbox tenants. Note: Adobe Email notifications related to the *Distribute Documents or Tasks* business process are not impacted by this check box. You can only disable these notifications by contacting Adobe directly.	• Set Up Adobe Sign on page 1337 • Reference: Adobe Sign Email Notification Settings on page 1342
Authenticate with Adobe	Enter: • The email address associated with your enterprise Adobe Sign account. • Your password. You must have account administrator or group	Set Up Adobe Sign on page 1337

Option	Description	More Information
	administrator access for your Adobe Sign account. For legacy Adobe Sign integrations that are currently authenticated in Workday, a View Adobe Sign Account Detail option is available in the Authenticate with Adobe drop-down prompt on the Edit Tenant Setup - Business Processes task. The View Adobe Sign Account Detail window shows the user account details that were most recently used for authentication. If OAuth Authentication is enabled on a legacy Adobe Sign account, you can also view the associated account details in View Adobe Sign Account Detail. Note: The View Adobe Sign Account Detail option is not available after running the Remove eSignature Configuration task.	
Authenticate with DocuSign	Enter the email and password for your Administrator DocuSign Production or Sandbox account.	Set Up DocuSign on page 1338
Configure DocuSign Anchor Text	Maps custom anchor text to DocuSign tags. Don't use these characters or strings in custom anchor text: • @ • </ • /> Don't include custom anchor text in Business Intelligence and Reporting Tools (BIRT) layouts.	Set Up DocuSign on page 1338

Related Information
Reference
Workday 31 What’s New Post: Generated Documents Local Language Display

Reference: Edit Tenant Setup - Financials

Manage tenant-wide settings for Workday Financial Management in these areas:

- Business Document Sequence IDs on page 36
- Budget Options on page 37

- Projects on page 38
- Defaults on page 42
- Customer Contracts Options on page 43
- Procurement Options on page 44
- Miscellaneous Payment Request Options
- Lease Accounting on page 51
- Cash Basis Accounting on page 52
- Supplier Accounts Options on page 52
- Supplier Options on page 53
- Supplier Portal Options on page 54
- Expenses Options on page 54
- Business Assets Options on page 56
- Banking Options on page 58
- Settlement and Bank Account Options on page 59
- Funding Source Options on page 60
- Intercompany Accounting Journal Options on page 61
- Retained Earnings on page 62
- Customer Accounts on page 62
- Customer Portal Options on page 64
- Journal Options on page 64
- Tax Options on page 64
- Endowments Accounting Options on page 66
- Data Entry Check Options on page 67

Business Document Sequence IDs

Option	Description	More Information
Business Document Sequence IDs	Select an ID sequence generator definition to automatically number documents across all companies. When you specify an ID sequence generator for a company on the Edit Company ID Definitions task, the company ID sequence generator values take precedence. If you leave both the tenant-level and company-level ID sequence generators blank, Workday: • Leaves the ID number on the documents blank. • Uses the Workday-generated reference ID of a document as the only unique identifier. You define ID sequence generators on the Create ID Definition task.	Create ID Definitions and Sequence Generators on page 12

Option	Description	More Information
	Note: Except for ID Generator for Miscellaneous Payment Request and ID Generator for Payment External EFT ID, sequence generator IDs aren't gapless.	
Business Entity Sequence IDs	Select the type of sequence generator to automatically number each new entity. When you leave this field blank, Workday assigns a unique ID to new business entities.	Create ID Definitions and Sequence Generators on page 12

Budget Options

Option	Description	More Information
Generate Budget Source Reference ID as Plan Name	Select this check box to use the plan name as the default budget reference ID for your financial plans and project budget sources. If you don't select this check box, Workday automatically generates the reference ID in the standard format on the Create Plan Template task.	
Group Allocations by Budget Date	Select to opt in to grouping your allocation result lines by the fiscal period on the budget date of source transactions. When you opt in, Workday displays a Budge Date column to these tabs on the allocation results: • Target • Offset • Source To group budget dates for source allocation results, you must configure specific values on allocation definitions, in addition to opting in. We also group allocation results that have no budget dates.	• Setup Considerations: Allocations • Steps: Set Up Allocations • Create Allocation Definitions • Reference: Source Types
Expense Report Default Date	Workday automatically selects the Document Date option as the default budget date for expense reports.	

Option	Description	More Information
	To use the expense line date as the default budget date, select the Expense Report Line Date option. For itemized expense lines, Workday uses the itemization date as the default budget date.	
Procurement Card Default Budget Date	Workday automatically selects the Source Document Date option as the default budget date for procurement card transactions. This option populates the original source document date as the budget date on your transactions. To populate the transaction date as the budget date, select the Document Date option.	
Purchase Order Default Budget Date	Workday automatically selects the Source Document Date as the default budget date for purchase order line items. This option populates the requisition line budget date as the budget date for your purchase order line. To use the purchase order document date as the default budget date, select the Document Date option.	
Supplier Invoice Default Budget Date	Workday automatically selects the Source Document Date option as the default budget date for supplier invoices and supplier invoice adjustments. This option populates the budget date from the purchase order, supplier contract, or requisition line or splits. To populate the budget date from the supplier invoice document, select the Document Date option.	Change the Budget Date for a Spend Transaction

Projects

Option	Description	More Information
ID Generator for Projects	Set your syntax for project IDs when you create a new project. When you leave the Project ID	Create Projects

Option	Description	More Information
	field blank, Workday assigns an incremental ID based on your naming convention. Use to convert basic project worktags to full-featured project definitions.	
Rating Scale	Set the scale by which to rate worker performance for each completed task on a project. The rating scale defines the options in the Rating and Default Rating fields on the Rate Work task and the related business process.	Steps: Configure Projects
Enable Worksheets for Resource Forecast	Select to use Worksheets to edit resource forecasts.	Steps: Set Up Resource Forecasts
Use Resource Plan Dates Use Project Plan Task Dates Use Task Resource Dates	Select to determine a worker's project eligibility. The date range determines when a worker can enter their time in Workday. To apply the most restrictive eligibility range, select multiple date options. When you select multiple options, the time entry date for the worker must be valid for all options.	Setup Considerations: Resource Plans
Include Worktag Types in WIP (Project and balancing worktags included without selection)	Configure to report on work in progress (WIP) with additional worktags from the source transaction. Workday updates WIP accounting journals to include worktags that are: • In the tenant configuration. • On the operational transaction.	Concept: Balancing Worktags on Capital Project Transactions
Configure Find Worker Report	Specify a report for all Find Workers buttons in Workday. By default, Workday uses the Find Worker for Project report. Note: If you specify a custom report, ensure that users have access to it so they can use the Find Workers button. If you configure a custom report, it must use the Workers for HCM Reporting data source.	Reference: Resource Management Reports
Always use Find Available Workers for Project	Select to use the Find Available Workers for Project report for	Reference: Resource Management Reports

Option	Description	More Information
	the Find Workers button. This setting overrides the report specified for Configure Find Worker Report.	
Run Project Worker Days Job	Select to start the Project Worker Days batch job. This job runs in the background and collects 3 years of scheduled daily hours on project workers. Project workers include workers who: • Have a project assignment. • Log time against a project or project plan task. • Are in resource pools. To view this data, you can: • Create a custom report that uses the Worker Utilization Target Sheet report data source. • Use the Utilization Targets for Workers - Monthly report.	Reference: Resource Management Reports
Start Month for Project Worker Days Job Start Day for Project Worker Days Job	Required to run the Project Worker Days job. Sets the 3-year date range for the data collected by the batch job. If the start date is after today, the date range is 2 years in the past and 1 year in the future. If the start date is before today, the date range is 1 year in the past and 2 years in the future.	Setup Considerations: Project Resources
Enable Resource Scheduling	Select to enable scheduling for your project resources. Workday requires resource forecasts for you to effectively use the Manage Worker Assignments report to schedule your resources. When selected: • Workday automatically generates resource forecasts when you create new projects. • You can schedule a job that generates resource	Steps: Set Up Resource Scheduling

Option	Description	More Information
	forecasts for the existing projects that don't already have a forecast. Note: Workday-generated resource forecasts don't display in the user interface, except for reporting. When you create your own forecasts, they replace the Workday-generated forecasts.	
Forecast Frequency View	Select the time interval for generating the resource forecast. Example: Week.	Steps: Set Up Resource Forecasts
Forecast Source	Select the source for generating the forecast hours. Example: Percent Allocation.	Set Up Plan Structures for Project Budgets
Forecast Hours	Select the numerical format for generating the forecast hours. Example: Whole Numbers	Concept: Resource Forecast Calculations
Enable Optimized Search by Project Assignable Role and Worker	Select this option to enable the Project Assignable Role and Worker for Assignable Role prompts in the search dialogs for the Manage Project Billing Transactions and Transfer Project Transactions tasks. When you enable this option and submit, one-time background processes will start immediately: *Initialization of Denormalized Role Assigner* and *Initialization of Denormalized Role Assignment*. These jobs can take a significant amount of time to complete and might affect your system's performance, especially if you have a large number of approved projects. To minimize disruption, we recommend activating this feature during off-peak hours or over a weekend. Users will only see these new prompts in the search dialogs once both initialization jobs have successfully completed. Note: Any subsequent changes to your project hierarchies, such as structure modifications,	Manage Project Billing Transactions

Option	Description	More Information
	parent/child changes, or role assignments, won't show up in search results immediately. Expect a delay until the hourly *Denormalized Role Assigner Audit* and *Denormalized Role Assignment Audit* jobs complete their processing. Also, the Project Assignable Role prompt does not support assignable roles associated with security groups with the access right *Applies to Current Organization and Subordinates to Level*. If you select this type of assignable role, the search doesn't return any transactions. Note: The Project Assignable Role you select may be assigned to more than one role-based security group, and those security groups can each have a different setting for Access Rights to Organizations. In this case, Workday applies access rights following this ranking order: • Rank 1: *Applies to Current Organization and All Subordinates* • Rank 2: *Applies to Current Organization and Unassigned Subordinates* • Rank 3: *Applies to Current Organization Only* • Rank 4: *Applies to Current Organizations and Subordinates to Level*	

Defaults

Option	Description	More Information
Default Company for Automatic Invoice Creation	Specify the company that you would like to use for automatic invoice creation. Workday uses this value only in a web service for legacy integration.	Setup Considerations: Accounting and Worktags for Student Financials

Option	Description	More Information
Default Revenue Category for Automatic Invoice Creation	Specify the revenue category that you would like to use for automatic invoice creation. Workday uses this value only in a web service for legacy integration.	Steps: Manage Revenue Categories
Default Reporting Book	Displays the default reporting Book on reports where you select the book as a parameter. You can change the default book by selecting the Tenant Default check box on the Maintain Books task. When you configure a default book for a company hierarchy or company, it overrides the tenant-level default. Note: If you define more than 1 book and don't set a default book, you must select a Book when you run a financial report. Otherwise, the report returns results for all books and you risk double-counting.	

Customer Contracts Options

Option	Description	More Information
Only Include Non-Recoverable Tax on Billable Transactions	Select to exclude recoverable tax from your expense report and supplier invoice billable amounts.	Setup Considerations: Project Billing
Require Paid Prepayment Status for Prepaid Billing	Select to require that you must apply payments to prepaid installments before you can consume against the installments.	Setup Considerations: Prepaid Billing Using Consolidated Billing Schedules Steps: Set Up Prepaid Billing Using Consolidated Billing Schedules
Invoice Prepaid Installments with Other Transaction Types	Workday automatically enables this check box and bills prepaid installments on the same invoice as other installments and transactions when you create customer invoices.	Setup Considerations: Prepaid Billing Using Consolidated Billing Schedules Steps: Set Up Prepaid Billing Using Consolidated Billing Schedules Create Consolidated Billing Schedules for Customer Contracts

Option	Description	More Information
		Steps: Manage Customer Invoice Proposals Create Customer Invoices from Contracts
Create and Submit Installment for Credit and Rebill	Select to automatically create and submit new installments on customer contract billing schedules when you create credit adjustments or create and rebill customer invoices.	Steps: Credit and Rebill Customer Invoices Create Consolidated Billing Schedules for Customer Contracts Create Installment or Transaction Billing Schedules for Customer Contracts
Include Closed Revenue Recognition Installments in Period-End Revenue Accounting	Select to include closed revenue recognition installments in calculations for period end revenue accounting.	Setup Considerations: Period End Revenue Accounting Steps: Reclassify Customer Contract Assets and Liabilities Reference: Period End Revenue Accounting Reclassification Calculations
Revenue Recognition Default Currency Rate	Select the currency conversion rate for Workday to use when you create new revenue recognition schedules with foreign currency. By default, Workday uses the revenue recognition installment date as the currency conversion rate unless you select a different option from the prompt.	

Procurement Options

Option	Description	More Information
Disable Workday Delivered Duplicate Supplier Invoice Validation on Supplier Reference	Select to disable automatic validation for duplicate supplier reference numbers for the same supplier, on: • Invoices. • Adjustments. You can't save the document if Workday finds a duplicate. When you disable automatic validations, Workday recommends that you validate for duplicates based on your own conditions. Use the Maintain Custom Validations	Create Supplier Invoices

Option	Description	More Information
	task to define condition rules for both supplier invoices and supplier invoice adjustments.	
Default Worker Location on Spend Transactions	Select for Workday to populate the primary job location of the worker in the Worktags field on: • Expense reports. • Requisitions. • Spend authorizations. The worker must be assigned a location to be able to default to a document. Workday copies the worker's location from a Requisition to a Purchase Order. This option applies only to Spend documents that reference a worker in Workday.	Create Requisitions Create Spend Authorizations Create Expense Reports
Use Current Date for Purchase Orders Sourced from Future-Dated Requisitions	Selecting the check box can misalign the accounting dates for purchase orders and requisitions, causing them to be in two fiscal periods. If you use commitment accounting, do not select this option.	Steps: Set Up Procurement
Item Display Option	Select to determine how Workday displays purchase items: • *Item Identifier*: Displays the item identifier. Example: *CRF0078*. • *Item Identifier - Item Name* and 1: Displays the item identifier and item name. Example: *CRF0078 - Safety Pins Jumbo* • *Item Name*: Displays the item name. The option you select displays for all procurement documents. If you aren't using items, no selection is necessary.	Steps: Set Up Purchase Items for Procurement
ID Generator for Purchase Item Identifier	Select a sequential ID generator for Workday to populate a sequential ID number on purchase items. Configure a sequence generator to enable this option. Set the last number used in the	Steps: Set Up Purchase Items for Procurement

Option	Description	More Information
	sequence generator after you've completed your item conversion.	
ID Generator for Purchase Item Event	Select a sequential ID generator for Workday to populate a Request ID number on a Purchase Item Event. This ID is applicable to the Create Purchase Item and Edit Purchase Item tasks.	
ID Generator for Mass Maintain Purchase Items Request	Select a sequential ID generator for Workday to populate a Request ID for purchase item requests made with the Mass Maintain Purchase Items Request task.	
ID Generator for New Purchase Items Request	Select a sequential ID generator for Workday to populate a Request ID for a purchase item requests made with the New Purchase Items Request task.	
Spend Category Hierarchy Root Node for Search Catalog	Select a root node to enable Category Hierarchy as a search option on the Search Catalog task so you can search for items by spend category hierarchies. You must create spend category hierarchies before you can enable this option. Coordinate with your FDM team to create your own custom spend category hierarchy for your items.	Create Requisitions
Disable Category Facet in Search Catalog	Select to hide nonhierarchical spend categories as a search option on the Search Catalog task. Used to prevent too many items returning in search results. Workday recommends standardizing your naming conventions so that a search returns only relevant items.	Create Requisitions
Default Requisition Company From User's Previous Requisition	Select for Workday to populate the Company prompt with the company on the last requisition created. This option minimizes the information a worker must enter when creating a requisition.	Create Requisitions

Option	Description	More Information
Default Requisition Ordering Method	Select an ordering method to set as the default ordering method that Workday recommends to users when they start a new requisition in the Requisitions worklet.	
Default Advanced Checkout in Requisitions Worklet	Select to display the Advanced Checkout in the Requisitions worklet to replace the simple checkout. The Advanced Checkout displays additional requisition details and fields to all workers using the worklet.	
Enable Advanced Ship Notices	Select to enable suppliers to create advanced ship notices (ASNs). Enable ASNs on each supplier to automatically process them. Buyers can also manually create ASNs.	Create Advanced Ship Notices
Enable Purchase Order Acknowledgements	Select to enable suppliers to create purchase order acknowledgments. Buyers can also manually create purchase order acknowledgments	Steps: Create Purchase Order Acknowledgments
Disable Multiple Purchase Order Acknowledgements	Select to accept only 1 purchase order acknowledgement for each purchase order line. Before you select this option, Workday recommends that you cancel any draft and in progress purchase order acknowledgements.	Reference: Purchase Order Statuses
Enable Multi-Company	Select to include multiple companies in lines on: • Purchase orders. • Requisitions. You can't disable this setting when you have active multicompany purchase order or requisition lines. When you select *Requisitions*, Workday automatically enables the *Purchase Orders* option. If you clear the *Requisitions* option, Workday doesn't automatically	Create Purchase Orders

Option	Description	More Information
	disable the *Purchase Orders* option. Business process routing only uses the document header company where applicable.	
Enable Consolidation of Requisitions Across Supplier Contracts	Select to consolidate requisition lines with different supplier contracts to 1 purchase order during sourcing when these values match: • Company. • Supplier. We display the supplier contracts at line level on resulting purchase orders. To automatically source while consolidating, schedule an automatic sourcing job on the Schedule Requisition Auto-Sourcing task. This option doesn’t apply to punchout requisition purchase orders. Each supplier cart returned creates 1 purchase order.	Schedule Automatic Sourcing of Requisitions Reference: Sourcing Requisitions
Only Defined Ordering Units of Measure for Catalog and Supplier Items on Transaction Lines	Select to restrict the unit of measure (UOM) options to the configured ordering UOMs for items with supplier information: • Create Change Order • Create Internal Service Delivery • Create Purchase Order • Source Requisitions	Concept: Multiple Ordering Units of Measure
Enable Catalog Data and Pricing for Purchase Item	Select to edit catalog item information, such as supplier item identifier and units of measure, on the Create Purchase Item task. This allows you to edit the catalog date transferred to the purchase item. If you aren’t using catalogs, don’t select this option.	Setup Considerations: Purchase Items with Supplier Information
Enable Duplicate Names for Purchase Items	Select to configure more than one purchase item with the same name. You can configure names that correspond with the	Steps: Set Up Purchase Items for Procurement

Option	Description	More Information
	item names that manufacturers, suppliers, and item content providers have for your items in their own systems.	
Enable Unit Cost Updates on Purchase Order Lines with Invoices	Select to enable updates on the Unit Cost field on goods lines from purchase orders associated with supplier invoices. You can update the purchase order price using the Create Change Order task when there's an invoice match exception. You can also update the lines for purchase order goods when the associated invoice has a status of *Draft*. When this option is enabled, you can update the unit prices on purchase orders to resolve supplier invoice matching exceptions. If you don't enable this option, you can't update the unit price on a purchase order line when doing a change order.	Steps: Configure the Supplier Accounts Match Process
Enable Patient Charge Information	Select to link purchase items to multiple Charge Description Master (CDM) codes associated with revenue centers and companies. You can use Patient Charge Information when integrating item information with external systems.	
Enable Healthcare Options	Select to capture and view medical procedure information on bill-only requisitions and ad hoc purchase orders. Enable this option to include Procedure Information on procurement documents.	Set Up Purchase Items for Inventory Maintain Par Locations
Disable Fully Receive for Purchase Order Receipts	Select to prevent users from fully receiving goods or services from purchase order receipts. When selected, workers must enter a quantity for each item on the receipt. While enabling full receipt of ordered quantities saves time,	Create Receipt Adjustments

Option	Description	More Information
	it can also increase errors in receipt quantities that may not be found until later.	
Enable Web Item Replacement for Requisition Sourcing	Select to enable web item replacement during auto-sourcing or manual sourcing of requisitions to purchase orders. When enabled, you can create purchase orders with item substitutes instead of the web items. When there isn't an item substitute, the purchase item linked to the web item is used when it has supplier information matching the supplier for that web item.	Steps: Set Up Sourcing of Requisitions
Enable Spend Category/ Supplier Mismatch Alert for Requisitions	Select to display a warning on requisition lines when the requester selects a supplier that hasn't been chosen for the spend category before. Workday also recommends the top 3 suppliers to select.	Steps: Set Up Machine Learning for Spend Category Recommendations
Disable Barcode Scanner on Create Recipe on Mobile	Select to hide the barcode scanner on the Create Receipt task on Workday mobile applications.	
Disable Prompts on Create Receipt on Mobile	Select to disable prompts on the initial screen of the Create Receipt task on Workday mobile applications.	
Enable Cancellation of Draft Receipts with Matched Invoices	Select to enable users to cancel draft receipts with associated supplier invoices that are matched or paid.	
Lead Time	Specify a value for the number of days between the document date of the purchase order and the expected delivery date. • Workday uses the lead time plus document date to calculate the due date on the purchase order. • When there are multiple lead times, Workday selects the lead	Create Suppliers Create Purchase Items

Option	Description	More Information
	time based on this order of priority: • Lead time specified on either the supplier item or catalog item. • Lead time specified on the supplier. • Lead time specified on the tenant.	

Miscellaneous Payment Request Options

Option	Description	More Information
Miscellaneous Payment Request Options	Select 1 of these accounting options for your miscellaneous payment requests: • *Accrual Basis Accounting*: Includes liability accounting and payment accounting. • *Cash Basis Accounting*: Includes payment accounting only. Note: To change the accounting option, all miscellaneous payment requests must be in *Canceled* or *Denied* status.	Setup Considerations: Miscellaneous Payment Requests

Lease Accounting

Option	Description	More Information
Lease Accounting	Use this prompt to: • Create lease-type supplier contracts. • Select applicable reporting. If you select *Operating Lease IFRS or Public Sector*, Enable Multibook Business Asset Accounting on the Business Assets Options section. If you select 2 or more options, you must configure lease contract book code configurations.	Steps: Set Up Lease Accounting Assign Book Codes to Lease Contracts

Option	Description	More Information
	You can't change your settings after you create an operating lease-type supplier contract.	
No Lease Accounting Items	Select to opt out of the lease accounting feature. You can still create financial lease type supplier contracts without configuring lease accounting in your tenant.	
None of the Above	Workday automatically selects the option during creation of tenant.	

Cash Basis Accounting

Option	Description	More Information
Book Code for Cash Basis Accounting	Select the book code to post cash basis transactions to in operational journals.	../../../financial-management/financial-accounting/cash-basis-accounting/steps--set-up-cash-basis-accounting.dita
Book Code for Accrual Accounting	Select the book code to post accrual transactions to in operational journals.	

Supplier Accounts Options

Option	Description	More Information
Hide Custom Validations on the Work Queue	Turns off custom validations in the Supplier Invoice Work Area report. Select the check box when the report doesn't load.	
Exclude from Supplier Invoice Discount	Select which charges you want to exclude from the calculation for the supplier invoice discount: • *Freight Amount* • *Other Charges* • *Tax Amount* When you pay supplier invoices within the discount period, Workday calculates the total amount in the settlement run. After you select the charges, we display these fields on the Supplier Profile: • Exclude from Supplier Invoice Discount	Create Suppliers

Option	Description	More Information
	• Override Supplier Invoice Discount Exclusions, that you can use to change the tenant level setup and configure unique discount calculation options for each supplier.	
Additional Discount Days	Enter the number of days you want to be able to take discounts past the discount period.	
Allow Access to Supplier Invoice Tasks With Detailed Validation Messages	Select to configure custom validations that display when you can't change or cancel supplier invoices or invoice adjustments. You can view the validations when you access the Cancel or Change related action menu from the supplier invoice or invoice adjustment. If you clear the check box, we don't display the Change or Cancel options.	Setup Considerations: Worktags on page 1347
Split Screen Default Option	Select to set up a default split page view preference for attachments on supplier invoices and invoice adjustments.	Reference: Supplier Invoice Split Screen
Enable Management Approval Chain Routing	Select to route supplier invoices for approval through the management chain of the approver. This saves you from having to create multiple roles to approve the invoice.	Set Up Routing through a Management Chain

Supplier Options

Option	Description	More Information
Enable Workday Central Login Provisioning for Supplier Contact	Select this option to activate Workday Central Login for your supplier contacts. Supplier Connector setup is required to enable this option.	Steps: Set Up the Unified Supplier Portal
Select Fields to Use to Detect Duplicate Suppliers	Select fields to use as criteria to detect and display potential supplier duplicates on these business processes: • Create Supplier • Create Supplier Request	Detect and Display Duplicate Suppliers

Option	Description	More Information
	• Create External Supplier Request	
Default Companies for Role Assignment	Select companies to set default responsibilities and permissions. These defaults apply to role assignments when the Supplier's Restricted to Companies field is blank. This also applies to changes in a worker's Supplier Settlement Bank Account Change Event if: • A non-worker created the supplier. • A supplier contact created the supplier. • You delegate the step to a role-based security group.	Create Suppliers

Supplier Portal Options

Option	Description	More Information
Enable Supplier Portal Custom Validations	Select to configure custom validations for supplier documents that external supplier contacts submit though the Supplier Portal.	Steps: Set Up the Supplier Portal

Expenses Options

Option	Description	More Information
Disable Grid View Default for Expense Report Reviews and Approvals	Select this check box to make list view the default view when reviewing or approving expense reports from My Tasks or the Expense Report Work Area report.	
Disable Multicurrency on Expense Reports	Select when your organization doesn't use multiple currencies on expense reports. Selecting this check box prevents workers from changing the expense line currency when creating and editing expense reports. It doesn't disable multicurrency functionality in your tenant.	

Option	Description	More Information
Hide Tax Checkbox on Expense Report	Select to hide the Tax check box when your organization doesn't require tax reporting. From the related actions menu of the saved expense report, workers can select Enable Tax to include tax amounts.	
Hide Spend Authorization field on Expense Report if Worker has no Spend Authorizations	Select to hide the Spend Authorization field if workers don't create spend authorizations for expense reports.	Create Expense Reports
Hide Billable Checkbox on Expense Report and Spend Authorization Line	Select when your organization doesn't bill customers for your worker expenses.	
Bill Expense Lines when Expense Report is Approved (versus Paid)	By default, Workday enables you to bill expense lines to the customers of a project when the expense report is in *Paid* status. Select to enable lines for billing after the expense report is in *Approved* status.	
Make Header the Default Tab for Expense Reports	Select to make the Header tab the landing page instead of the Expense Lines tab, when workers create new expense reports.	
Years to Retain Financial Data for Purged Workers	Specify the number of years to retain financial data for terminated workers to: • Meet the data retention requirements for your country. • Comply with company financial auditing policies. When you configure this option and complete the Purge Person Data task, Workday permanently deletes personal data for terminated workers from: • Expense credit cards. • Expense reports. • Procurement cards.	Setup Considerations: Data Purging
Restrict Selection of Project Worktags by Resource Plan	Select to restrict worker access to only the project worktags associated with their assigned resource plans.	Concept: Resource Plans on Projects and Project Hierarchies

Option	Description	More Information
	When a project hierarchy inherits a resource plan, Workday uses the resource plan from the lowest parent hierarchy of the project.	Configure Worktags for Transactions on page 1358
Enable Cash Advances	Select to configure cash advance requests using a spend authorization.	Steps: Set Up Cash Advance Requests
Enable Tax Defaulting for International Expenses	Select to set default tax to populate tax codes and tax applicability for expense items. After you select this check box, you can't clear it. Workday automatically enables this option for all new tenants, but you must enable it manually in existing tenants.	Setup Considerations: Transaction Tax Rules
Enable Expensing of Booked Travel Booking Records Before Travel End Date	Select to enable payees to expense unpaid travel booking records that are in *Booked* status, before the end date of their trip. When you don't select this check box, Workday prevents payees from expensing unpaid bookings that they might cancel before departure.	Steps: Set Up Travel Booking Records

Business Assets Options

Option	Description	More Information
Enable Multibook Asset Accounting	Select to post financial transactions to 1 or more accounting books for lifecycle events of a single asset. You can: • Depreciate each asset book independently. • Restrict lifecycle events to a specific book. Workday recommends that you don't disable multibook asset accounting after you enable it. Note: You can't expense assets without shares on supplier invoice line splits with multibook asset accounting enabled.	Steps: Set Up Multibook Asset Accounting

Option	Description	More Information
Post Work in Progress to Company Asset Book Codes	Enable asset accounting for multiple books first. You can then select this check box to enable automatic work-in-progress (WIP) reclassification to multiple book codes setup for the company.	Concept: Post Work in Progress to Company Asset Book Codes
Expense Assets in the Common Book Code	Enable asset accounting for multiple books first. When you select this check box, you can override the Accounting Treatment dimension on the spend account posting rule and keep the value set to *Expense*.	Concept: Post Work in Progress to Company Asset Book Codes
Auto Populate Coordinating Cost Center	Select for Workday to populate the Coordinating Cost Center prompt from the selected cost center worktag during asset registration.	Assign Asset Accounting Information
Expense Assets without Shares on Supplier Invoice Line Splits	Select to prevent splits to supplier invoice lines from creating asset shares and automatically set the accounting treatment to *Expense*.	Create a Non-PO Supplier Invoice
Create Multiple Assets from Purchase Order Service Line	Select for Workday to initiate an asset registration event for every partial receipt or supplier invoice you create from a single purchase order service line with a trackable spend category. Workday creates assets for receipts or supplier invoices on the same service line, but not for both. When you don't select this check box, Workday creates only 1 asset for the first receipt or supplier invoice you create from a purchase order service line with a trackable spend category. Note: Workday doesn't update the first asset for subsequent receipts and invoices you create from the same service line. You can perform a cost adjustment and reference a supplier invoice to apply subsequent invoice amounts to the first asset created.	Register Assets

<table>
<tr><th>Option</th><th>Description</th><th>More Information</th></tr>
<tr><td>Always Go to Review Trackable Lines for Trackable Spend Category</td><td>Select to always prompt users to review and edit trackable lines on purchase order line receipts or supplier invoices before registering assets. When you select this check box, Workday populates the accounting treatment on assets based on asset book rules.

When you don't select the check box, Workday:
Bypasses the review of trackable lines for all subsequent invoices or receipts created from the same purchase order line, and doesn't create assets when you:
Partially receive the purchase order line, creating multiple receipts or supplier invoices.
Determine that the asset isn't trackable during your first review of a trackable line.
Populates the accounting treatment on assets based on:
The asset book rules, on your first review.
The accounting treatment from the first review, on subsequent reviews.
This tenant option only applies when you enable the review of trackable lines for assets.</td><td>Concept: Trackable Line Reviews</td></tr>
</table>

Banking Options

Option	Description	More Information
Exclude Bank Account Worktag on Ad Hoc Bank Transaction Accounting Lines	Automatically selects a check box on ad hoc bank transactions to exclude the bank	Create Ad Hoc Bank Transactions

Option	Description	More Information
	account worktag from noncash accounting lines. You can still clear the worktag check box on any ad hoc bank transactions that you create.	

Settlement and Bank Account Options

Option	Description	More Information
Enable Multicurrency Settlement Run	Select to search for items or payments in multiple currencies to add to settlement runs. When selected, Workday settles the payments using the currency of each transaction.	Create Manual Settlement Runs Schedule Automatic Settlement Runs
Bank Account Masking for Payment Election	Select to mask bank account numbers and international bank account numbers on these tasks to secure sensitive information for workers: • Change Account Information • Delete Bank Account Workday also masks the fields on the *Payment Election Enrollment Event* business process for worker profiles. Users with access to the *Person Data: Bank Account Masking* security domain can view the unmasked fields.	Setup Considerations: Payment Elections
Enable Dynamic Supplier Payment Date	Select to enable dynamic supplier payment dates for supplier invoices on these tasks: • Create Settlement Run • Schedule Settlement Run When you create a settlement run, you can use the Dynamic Supplier Payment Date prompt to default supplier payment dates dynamically based on the: • *Invoice Discount Date* • *Invoice Due Date* • *Settlement Run Date* Select theApply Supplier Credit Adjustments to First Payment Due check box to	Create Manual Settlement Runs Schedule Automatic Settlement Runs

Option	Description	More Information
	automatically apply supplier invoice credit adjustments to invoice payments during settlement. Workday nets pending credit memos against supplier invoices irrespective of their due dates.	
Disable BIC Validation for Payment Elections and Settlement Bank Accounts	Select to display a warning when you enter an invalid bank identification code on a payment election or settlement bank account. Clear the check box to display an error that prevents users from entering incorrect bank identification codes. This check box doesn't affect: • Company bank accounts, which always display a warning when you enter an invalid bank identification code. • Web services, which always prevent you from entering an invalid bank identification code.	
Enable IBAN Validation for Payment Elections and Settlement Bank Accounts	Select to display an error when you enter IBANs that contain lowercase characters or spaces on payment elections or settlement bank accounts.	
Consolidate Supplier Payments On Behalf of Multiple Companies	Select to consolidate supplier payments that you pay on behalf of multiple companies to the same supplier into a single payment. Note: You can't consolidate supplier payments when any company that you pay on behalf of uses a tax certificate number.	Setup Considerations: On-Behalf-of Intercompany Activities
Enable Payment Purpose Code	Select to enable payment purpose codes for ad hoc and supplier payments.	Steps: Set Up Payment Purpose Codes Maintain Payment Purpose Codes

Funding Source Options

Option	Description	More Information
Top Project Hierarchy	Specify a top project hierarchy to group project hierarchies	Steps: Set Up Multiple Funding Sources

Option	Description	More Information
	for funding sources separately from projects for the rest of the organization. When you create funding source or funding source rule, you can include any project in the top-level project hierarchy you specify here.	
Disable Funding Source Reclassifications for WIP Lines	Select to restrict Workday from reclassifying work- in-progress (WIP) transactions during processing and reprocessing of funding sources.	Setup Considerations: Multiple Funding Sources
Include Commitment Spend	Select to include requisition spend in the commitments ledger during the processing of funding sources.	Setup Considerations: Multiple Funding Sources
Include Obligation Spend	Select to include purchase order and supplier contract spend in the obligations ledger during the processing of funding sources.	Setup Considerations: Multiple Funding Sources

Intercompany Accounting Journal Options

Option	Description	More Information
No Intercompany Payable/ Receivable Lines when Journals Self Balance by Company	Select to restrict Workday from generating intercompany receivables and payables lines when your journals self-balance by company.	Setup Considerations: On-Behalf-of Intercompany Activities
Group Intercompany Payable/ Receivable Lines	Select to automatically group intercompany receivables and intercompany payables lines when journals don't self-balance by company. Note: This option sums all intercompany receivables and intercompany payables lines as single lines. It doesn't net payables and receivables.	Setup Considerations: On-Behalf-of Intercompany Activities
Unrestricted Intercompany Affiliate Selection	Select to enter a company with a valid intercompany profile on the *Intercompany Affiliate* worktag on the journal line entry. The *Intercompany Affiliate* worktag is no longer restricted to the header company.	Setup Considerations: On-Behalf-of Intercompany Activities

Option	Description	More Information
Copy Attachments to Intercompany Accounting Journals	Select to display attached files on the child intercompany accounting journals.	Attach Files on Associated Intercompany Journals

Retained Earnings

Option	Description	More Information
Include Worktag Types	Specify up to 10 worktag types. Workday includes the worktag types you specify here in addition to the primary and optional balancing worktags when grouping the income statement (current year retained earnings) lines during the year end roll forward process. Note: To facilitate eliminations during consolidation, Workday recommends that you include Intercompany Affiliate as one of the worktag types. Workday saves these worktags on the beginning balance journal lines for retained earnings.	Roll Year-End Balances Forward Set Up Worktag Types for Roll Forward

Customer Accounts

Option	Description	More Information
Enable Unique Invoice IDs for Credits, Debits, and Rebills	Select the check box to create and process adjustments with a unique invoice ID for all companies. It enables you to comply with global accounting requirements. When selected, Workday removes and inactivates ID generators set at the company level, unless you've selected Inherit from Tenant option on the Edit Customer Account Options task.	Set Up Unique Invoice Numbering for a Company
Customer Display Name Format	Select to determine how Workday displays the customer name and associated ID on customer documents: • *Customer ID + Customer Name:* Displays both the ID and the name in the order shown.	

Option	Description	More Information
	• *Customer Name*: Displays only the customer name. • *Customer Name + (Customer ID)*: Displays the name first followed by the ID. Example: *Lexcom (C-007)*	
Restrict Invoice Field Editing	Select to restrict editing of fields that inherit values from awards and contracts. You can then keep customer invoices and adjustments in sync with contract bill amounts. Workday doesn't restrict your ability to edit worktags. You can create custom validations using calculated fields to verify if an invoice derives the worktag from a contract. Opting in this functionality might impact your integrations when you update invoice values.	Reference: Invoice Fields Restricted for Edits
Enable Interest and Late Fees	Select the check box to run the Process Interest and Late Fees task. To opt out in the future, clear the check box and Workday will no longer calculate or display the interest and late fee rules on customer invoices.	Setup Considerations: Interest and Late Fees
Use Payment Date Currency Rate for Cross-Currency Payments	Select the check box to apply cross-currency customer payments using the currency rate from the payment date by default. When you don't select this option, Workday applies cross-currency payments using the payment application date by default. When you specify a currency override rate for your cross-currency application, Workday uses the currency override rate to calculate the payment amount in the invoice currency regardless of the opt-in status.	• Concept: Foreign Currency Customer Payments • Steps: Apply Customer Payments

Option	Description	More Information
Enable GenAI for Collection Letters	Select the check box to enable Generative AI (GenAI) for collection letters. When you select the check box, Workday adds a Generate with AI option to the Email Collection Letter task.	• Steps: Set Up Collection Letters • Email Collection Letters
Enable GenAI for Collection Message Templates	Select the check box to enable GenAI when you create Message Builder templates for collection letters. When you select the check box, Workday adds a Generate with AI option to the Create Message Builder Template task.	Steps: Create Collection Letter Templates

Customer Portal Options

Option	Description	More Information
Customer Portal Payment Type	Select an option to process customer portal payments. You can only select those payment types that have a Payment Method of *Manual*. Once you enable it, you can't leave the value blank.	Configure Bank Accounts for Customer Portal Payment

Journal Options

Option	Description	More Information
Always Reverse Operational and Noncontrolling Interest Journals	Select for Workday to create a reversal journal when you cancel an operational or noncontrolling interest journal.	Concept: Operational Journal Reversals
Always Reverse Accounting and Accounting Center Summary Journals	Select for Workday to create a reversal journal when you unpost an accounting journal, or reverse a summary journal when you cancel an accounting center batch.	Concept: Accounting and Operational Journals

Tax Options

Option	Description	More Information
Enable Tax Point Date Configuration for Transaction Taxes	When you select this check box, you can:	• Create Customer Invoice Adjustments • Create Customer Invoices

Option	Description	More Information
	• Specify the type of tax point date on the Tax Point Date Type prompt. • Enter a Tax Point Date at the document line level for use in tax reporting.	
Enable Address Level Tax Details	Select to enable users to record tax details at the address level for companies, customers, and suppliers. When this functionality is enabled, Workday assigns tax IDs on invoices based on the shipping address, in this order of precedence: • Address-level tax information for the shipping address, where available, or • The country on the shipping address. If neither are available, Workday assigns tax IDs based on the tax code on the invoice line. Example: A customer has a primary address in France and an additional address in Germany. When you create a customer invoice for shipping to the German address, Workday defaults the transaction tax ID for Germany rather than France.	• Steps: Set Up Address-Level Tax Information • Concept: Automatic Assignment of Transaction Tax IDs on Invoices
Enable Company Tax Options for Supplier Invoice Request Invoices	Select to trigger tax defaulting rules for supplier invoices created from supplier invoice requests.	After set up, the Default Tax Option prompt at the supplier invoice header from the company populates when you: • Set up tax defaulting rules. • Enable company tax options for invoices created from supplier invoice requests. If the company tax option is either *Calculate Tax Due to Supplier* or *Calculate Self-Assessed Tax*, Workday populates these fields at the line: • Tax Applicability • Tax Code

Option	Description	More Information
		• Tax Option • Tax Recoverability
Populate Transaction Tax on Supplier Invoices Populate Withholding Tax on Supplier Invoices	Select to enable tax default rules on invoices from contracts and purchase orders. Then, the transaction and withholding tax rules populate on these tasks when you create a supplier invoice: • Create Supplier Invoice • Create Supplier Invoice Adjustment • Schedule Supplier Invoice Creation from Contract Installments • Supplier Invoice Workbench • Supplier Portal	The tax default rules apply to these documents: • Supplier invoices that you create from purchase orders or supplier contracts, including lease-type contracts. • Supplier invoice adjustments for a returned receipt from a supplier contract or purchase order. Tax default rules apply to the supplier invoice only when tax details are blank on a purchase order or supplier contract; otherwise, tax details transfer from the supplier contract or purchase order to the generated supplier invoice.

Endowments Accounting Options

Option	Description	More Information
Book Code for Investment Pool Purchase Book Value Accounting Book Code for Investment Pool Transfer Book Value Accounting Book Code for Investment Pool Sale Book Value Accounting Book Code for Investment Pool Payout	Select the book codes to post the accounting for investment pool purchase, transfer, sale, and payout transactions. Workday generates journal lines for these transactions to post to the associated books. To post to the common book, leave this prompt blank. You can also use the book codes to report on these transactions in financial reports.	Steps: Create Book Codes for Investment Pool Transactions Concept: Book Codes and Books Run Investment Pool Payout Distributions
Book Code for Investment Statement	Select the book code to post the accounting for investment statement activities. Workday generates journal lines for the activities, such as unrealized losses, interest, and dividends, to post to the associated books.	Steps: Create Book Codes for Investment Pool Transactions Steps: Use Endowment Accounting
Enable Net Asset Accounting for Investment Pool Transfer and Sale	Select to enable net asset accounting for investment pool transfers and sales for your tenant.	Steps: Create Book Codes for Investment Pool Transactions Steps: Set Up Net Asset Accounting

Option	Description	More Information
Book Code for Investment Pool Transfer Net Asset Accounting Book Code for Investment Pool Sale Net Asset Accounting	Once enabled, you can select the book codes to post the net asset accounting to the associated books for investment pool transfers and sales.	

Data Entry Check Options

Option	Description	More Information
Switch on Data Entry Check everywhere	Select to enable numerical data entry check in real time. Workday uses machine learning to analyze the numerical data input and displays an alert when the data falls outside historical norms. When you select this check box, Workday enables data entry check in all areas	You must have at least 100 records with the matching dimensions applied in the past 12 months for the machine learning model to analyze the values. Workday limits the data used for analysis to the smaller of these numbers: • The row count of the records in the past 12 months. • The most recent 1 million rows of data.
Select areas to switch on Data Entry Check	You can select areas to which you want to apply data entry check.	Steps: Write Off Receivables

Related Information

Reference

Workday 31 What's New Post: Dynamic Supplier Payment Dates

2020R1 What's New Post: Budget Date on Expense Reports

2021R1 What’s New Post: Consolidate Supplier Payments

2021R2 What’s New Post: Custom Validations on Supplier Portal

2021R2 What’s New Post: Detect and Display Duplicate Suppliers

2022R2 What's New Post: Currency Conversion Rates for Revenue Recognition

Reference: Edit Tenant Setup - Global

Manage tenant-wide language and location settings in these areas:

- Languages on page 67
- Personal Data for Workers on page 69
- Frequently Used Values on page 70
- Other on page 70

Languages

Option	Description	More Information
Hide Translations after Base Value Change	Hides translated values when you edit the base value of	Steps: Manage Translations on page 360

Option	Description	More Information
	a translatable instance. To preserve translated values, clear this check box. The setting is only valid for tenanted translations.	
Available Languages	Identifies each Language, in addition to English, that Workday supports and indicates: • Its name as it displays in the native language (Native Name). • If the language is currently available as a display language for Workday users (Workday-Supported). • The locales for which Workday uses the language as the default (Default for Locales). You can select the Enabled check box for a Workday-supported language to enable it as the default display language for users in its associated locales. Users can select an enabled language as a preferred display language override. Workday doesn't deliver user interface translations in non-Workday-supported languages. However, you can still enable languages that Workday doesn't support and translate tenanted data into those languages, enabling integration system users to support local payroll or other integrations. Note: When you enable a new Workday-supported language, it affects the default display language for all users with locales associated with that language. Instead of seeing the interface in English, users automatically see the interface in the enabled language. Users can change their interface to display in English by accessing the Change Preferences task	Workday Community: Languages

Option	Description	More Information
	and setting their Preferred Display Language to *English*.	

Personal Data for Workers

Option	Description	More Information
Citizenship: Track For Academic Affiliates in These Countries	Tracks Citizenship Status in the academic affiliate's personal information for the selected countries and regions. When displaying fields enabled for specific countries, Workday compares the country associated with an academic affiliate's primary position with the countries selected here.	Steps: Set Up Personal Information Fields
Date Entered Workforce: Track for Workers in These Countries	Tracks the Date Entered Workforce in employee service dates for the selected countries and regions. When displaying fields enabled for specific countries, Workday compares the country associated with a worker's primary position with the countries you select here.	Steps: Set Up Personal Information Fields
Use Date with Day Precision for Education: Track for Workers in These Countries	Tracks education dates to the day, rather than the year, for the selected countries and regions. When displaying fields enabled for specific countries, Workday compares the country associated with a worker's primary position with the countries selected here.	../../../human-capital-management/worker-information/worker-experience/job-history/jai1416516414637.dita
Allow Multiple Ethnicities: Allow in These Countries	Enables you to select more than 1 ethnicity for workers in the selected countries and regions.	Steps: Set Up Personal Information Fields
Allow Multiple Veteran's Preference	Enables you to select more than 1 veteran's preference for workers in the selected countries and regions.	Steps: Set Up Personal Information Fields
Dependents for Payroll Purposes: Track For Workers' Dependents in These Countries	Tracks Dependents for Payroll Purposes in the worker's dependent information for the selected countries and regions.	Steps: Set Up Personal Information Fields

Option	Description	More Information
Place of Birth: • Track Country of Birth for Academic Affiliates in These Countries • Track Region of Birth for Academic Affiliates in These Countries	Tracks the birth place of the academic affiliates for selected countries and regions.	Steps: Set Up Personal Information Fields

Frequently Used Values

Option	Description	More Information
Country	Adds the selected countries to all country prompts.	(Optional) Steps: Set Up Custom Names for Countries on page 352
Preferred Currencies for Prompting	Adds the selected currencies to the Preferred Currencies prompt displayed in the Default Currency field on the Edit Tenant Setup - System task.	Reference: Edit Tenant Setup - System on page 164 Steps: Set Up Currencies on page 336

Other

Option	Description	See Also
Allowed Phone Validations	Enables phone validations by country. When you enable phone validations, Workday validates and formats a valid phone number. If the phone number is invalid, Workday displays an error message.	Steps: Set Up Phone Numbers
Self Service Payment Election Countries	Specify the countries in which workers can make self-service payment elections. Payment election types include payroll and expense reimbursement pay types.	Steps: Set Up Payment Elections
Use Extended Address Format in These Countries	Enables predefined extended address formats for the selected countries, including addresses associated with all business objects, such as: • Accounts • Banks • Companies • Customers • Locations • Workers	Steps: Set Up Address Components by Country

Option	Description	See Also
	Basic address formats conform to postal requirements. Extended address formats conform to local payroll and government requirements in addition to postal requirements. The most common difference between the basic and extended address formats for these countries is that House Number and Street Name are 2 separate fields. When you enable the extended format for a country, the additional fields that make up the extended format are immediately available for data entry. Note: Changing from basic to extended address formats requires a conversion to ensure existing data maps correctly to new fields and that reports and integrations incorporate the new fields.	
Enable Partial National ID Masking for These Countries	Enables the display of a partially masked National ID for selected countries. Each country must have a National ID type configured.	
Enable Unlimited National ID Verification Attempts	Disables the preset limit of 5 attempts to verify a National ID after which you can't make another attempt.	
Verify National ID Custom Message	Enables you to create a custom message to display when a National ID can't be verified. A default message displays if you don't provide a custom message.	
Enable Phonetic Name for Company and Business Entity in These Languages	Enables phonetic name fields in supported languages for: • Bank details • Business entities • Companies • Customers • Payees • Suppliers	

Option	Description	See Also
	You can use these fields to record the correct pronunciation of names and to display phonetic names on specific financial documents.	
Enable Furigana Validation	Enables validations on Furigana data entries.	
Enable Western Script Validation	Enables you to select languages for western script validation.	
Enable Country / Territory Label	Enables you to override country labels with country / territory labels in some Workday tasks. Note: If you enable this setting, we recommend that you also use the Maintain Custom Labels task to create a custom label to override the term country everywhere in your tenant.	

Related Information
Reference
Moving from Basic to Extended Address Format
Name and Address Formats

Reference: Edit Tenant Setup - HCM

Manage tenant-wide settings for Workday Human Capital Management in these areas

- ID Sequence Generators on page 72
- Staffing on page 74
- Job Requisitions on page 80
- Benefits on page 82
- Compensation on page 83
- Educational Institutions on page 88
- Talent on page 89
- Org Chart on page 92
- Payroll Interface on page 92
- Leave of Absence on page 94
- Time Off on page 94
- Time Off: Threshold on page 96
- Time Tracking on page 96
- Learning on page 98
- Packaged Content on page 101
- Learning: Extended Enterprise on page 102
- Data Entry Check Options on page 102
- Generative AI

ID Sequence Generators

Select the formats you want Workday to use when it creates unique ID codes.

Option	Description	More Information
Default Custom IDs for...	Sets custom ID types to use in addition to the Workday ID or the ID Definition.	Steps: Set Up Identification Documents
ID Definition for...	Sets an ID definition to use instead of the Workday-generated ID code. If this field is blank, Workday generates an ID code for this object. The format of the ID definition displays the last ID generated. You can also create your own definitions with the Create ID Definition task, specifying a combination of text, sequence numbers, and dates. When you use the [seq] variable, the ID definition becomes a sequence generator that identifies each person, position, or incident with a unique number.	Create ID Definitions and Sequence Generators on page 12
Include ID in Candidate Name	Displays the candidate's ID with their candidate name.	Create Custom Reference IDs for Candidates
ID Definition for Employee Contract ID	Sets an ID definition to use to generate a contract ID for new contracts. Only applies when you activate the Employee Contract: Generate Contract ID for each New Employment localized field on the Maintain Localization Settings task.	Calculate Employee Contract IDs
Do Not Display Position ID	Hides sequence-generated IDs from position display titles.	Create Hiring Restrictions
Reuse Worker ID	Enables you to: • Reuse an employee ID if available when you convert an employee to a contingent worker. • Reuse a contingent worker ID if available when you convert a contingent worker to an employee.	Convert Contingent Workers to Employees Contract Contingent Workers
Reuse Former Worker ID	Enables you to reuse a former worker ID as the employee ID or contingent worker ID when rehired.	Steps: Manage Former Worker Data
Reuse Worker ID for Academic Affiliate ID	Enables you to reuse a worker ID as the affiliate ID when you	Concept: Academic Affiliates

Option	Description	More Information
	add an affiliate status to a terminated or retired employee.	
Reuse Academic Affiliate ID for Worker ID	Enables you to reuse an affiliate ID as a worker ID when hired.	Concept: Academic Affiliates
Reuse Student ID for Worker ID	Enables you to reuse student IDs for worker IDs when you hire students as workers.	Steps: Hire Students
Include ID in Person Name	Displays either the person's employee ID, contingent worker ID, or universal ID in their name. The universal ID applies to: • Contingent workers • Employees • Pre-hires Ensure that you create ID definitions for these IDs to display. If you don't, empty parentheses display beside the person's name.	Steps: Set Up Worker Names Steps: Set Up Workday IDs

Staffing

Option	Description	More Information
Service Length Type	The method to use when calculating length of service.	Change Worker Service Dates
Position Setup Options	*Multiple Jobs*: • Workday recommends that you select *Multiple Jobs* for your international assignments and additional jobs to be recognized by other features and reports. *Work Hours Profile*: • For hourly workers with nontypical weekly hours, enables Workday to equate their work week to the location standard week for accruals and to annualize compensation. This option requires you to assign a *Work Hours Profile* to every worker.	Reference: Impacts of Enabling Multiple Jobs Set Up Work Hours Profiles
Change Job Default Headcount Option	Specifies whether to backfill, move, or close headcount when the *Change Job* business process moves workers	Steps: Set Up Job Changes

Option	Description	More Information
	between position management organizations. If blank, the default option is to backfill the headcount. You can override this setting on *Change Job* tasks. Note: When you hire a worker to fill a job requisition, the default option is to close or backfill the headcount. You can change the default option on the *Revise Change Job* step. If you change the option to Move this headcount to the new manager, the worker retains the original position with the position restriction from the job requisition. The proposed job requisition remains unfilled.	
Change Job Use Default Organizations for Job Management	Applies when you use the *Change Job* business process to move a worker between job management organizations. When checked, Workday: • Moves the worker into a new job. • Applies hiring restrictions to the new job. • Removes the worker's role assignments. • Populates organization assignments from the job requisition. When there's no job requisition selected, Workday populates the organization assignments from the proposed supervisory organization. • Creates a new position ID for the inbound position. When unchecked, Workday: • Moves the job with the worker. • Doesn't apply hiring restrictions. • Keeps the same organization and role assignments.	Steps: Set Up Job Changes

Option	Description	More Information
	• Keeps the same position ID. When checked, you can automatically reassign roles by configuring the *Copy Role Assignments* service step on the *Change Job* business process definition of the receiving organization. The service step must be after the *Complete* step of the business process definition, and can only reassign roles assigned before the effective date of the job change. This service step isn't for use with: • Future-dated role assignments. • Position Management organizations. • Workers with multiple jobs.	
Change Job Default for Move Team with Manager	Automatically populates *Yes* for the This person is a manager. Do you want to move their teams with them? field. If you don’t select this check box, the Change Job task automatically populates *No*.	Concept: Move Manager's Team
Union Custom Organization Type	Selects a custom union organization. To implement unions, use the union-specific functionality rather than custom organizations.	Steps: Manage Unions
Management Level Hierarchy	Specifies which management level hierarchy to use. You can create new hierarchies with the Create Management Level Hierarchy task. Workday uses the hierarchy you select for Career Hub filtering if you choose to override the default machine learning setting.	Set Up Management Level Hierarchies
Hide Management and Job Levels	Hides the level number in job and management level hierarchies everywhere they display.	Set Up Management Level Hierarchies Set Up Job Level Hierarchies
Job Level Hierarchy	Specifies which job level hierarchy to use. You can create	Set Up Job Level Hierarchies

Option	Description	More Information
	new hierarchies with the Create Job Level Hierarchy task. Workday uses the hierarchy you select for Career Hub filtering if you choose to override the default machine learning setting.	
Enable Job Overlap for Vacating Positions	Enables you to overlap workers in the same position. You can select individual jobs for overlap as part of staffing events that leave positions vacant, such as *Termination* and *Change Job*.	Concept: Job Overlap
Automatically Select Is This Position Available for Overlap on Vacating Events	Automatically selects the Is this position available for overlap? check box on staffing tasks that leave positions vacant, such as *Terminate Employee* and *Change Job*.	Concept: Job Overlap
Enable Job Overlap on Position Restrictions	Enables you to select if a position is available for overlap on the position restriction so that you can backfill a position that already has a worker with an unknown vacating date. The Available for Overlap check box displays on these tasks: • Create Position • Edit Position Restrictions	Concept: Job Overlap
Enable Job Overlap Routing Exclusion Rules	Enables you to specify job overlap positions to exclude from receiving notifications. To activate, set up the *Set Up: Job Overlap Routing Exclusion Rules* security domain. This check box is only available if you've also selected either of these check boxes: • Enable Job Overlap for Vacating Positions • Enable Job Overlap on Position Restrictions	Steps: Set Up Job Overlap
Enable FTE on Position Restrictions	When selected, the Default Weekly Hours, Scheduled Weekly Hours, and FTE fields display on these tasks: • Create Position • Edit Position Restrictions	Create Positions Change Position Restrictions

Option	Description	More Information
	Workday will also default values into the Scheduled Weekly Hours and Default Weekly Hours fields on these business processes: • *Hire* • *Add Additional Job* • *Change Job* • *Contract Contingent Worker* • *Start International Assignment* When there's no work hours profile or job requisition for the position, Workday populates the fields with default values based off the position restrictions.	
Sync Employment/Contract End Dates	Automatically updates the End Employment Date field for fixed-term employees whose Contract End Date or Expected Assignment End Date changes. Any new contract end dates, expected assignment end dates, and employment end dates synchronize to the later date. Note: If there's a future *Contract* event, the Employment End Date synchronizes to the Contract End Date of the most future-dated *Contract* event. The Contract End Date displays the end date of the active contract.	Add Employee Contracts Add International and Domestic Assignments
Allow Override of Restrictions on Staffing Events	Enables you to override these hiring restrictions on staffing actions, such as *Hire* or *Change Job*: • Job Profile • Location • Time Type • Worker Type	Concept: Hiring Restrictions
Hide Former Worker Personal Data when Rehired	Hides the personal data of rehired former workers in their former worker records.	Steps: Manage Former Worker Data
Use Job Profile Values for Position Restrictions Tasks	Automatically updates position restrictions after you edit these fields on a job profile: • Critical Job • Difficulty to Fill	Change Hiring Restrictions

Option	Description	More Information
	• Job Description • Job Profile Summary	
Mass Change Organization Assignments Defaulting	Sets the defaulting behavior for the *Change Organization Assignments* subprocess of the *Move Workers (Supervisory)* business process. You can change the option when performing a specific transaction.	Move Workers in Supervisory Organizations
Precompute Manager/Leader Name for Organization Search	Calculates role assignments in advance to improve performance on searches that include large or complex organizations.	../navigation/cww1590707327779.dita
Precompute Manager/Leader for Organization Chart	Calculates role assignments in advance to improve performance on people-view organization charts.	../../organizations/lah1480533274925.dita
Precompute Manager/Leader in Organization Name	Calculates role assignments in advance to improve performance on reports that display a large number of supervisory or matrix organizations configured to include Manager/Leader in an organization name.	../../organizations/dan1370797386252.dita ../../organizations/dan1370797887973.dita
Correct Supervisory Organization on Hire	Enables you to correct the supervisory organization on the *Hire* business process.	Concept: Corrections to Staffing History
Automatically Reassign My Tasks Items	Enables Workday to automatically reassign My Tasks items awaiting action after you correct the supervisory organization on the Hire business process. A background job reassigns all worker events that are awaiting action to all new role assignees, which functions the same as the *Reassign Business Process Step* mass operation type. Reassignment security permissions for the impacted events aren't individually assessed.	Set Up Mass Operations on page 1037

Job Requisitions

Option	Description	More Information
Enable Organization Defaults on Create Job Requisition	Populates organization assignments on the *Job Requisition* business process according to the staffing model: • Job management: From the supervisory organization. • Position management: From the supervisory organization of the new position, or the Defaulting Behavior for Position Management Job Requisitions option for new job requisitions for an existing position.	Reference: Default Job Requisition Data
Enable Job Requisitions for Position Management	• Require Job Requisitions for all Position Management staffing events: Requires job requisitions for all staffing events in supervisory organizations that use position management. • Enable Job Requisitions for Position Management based on rules: Requires job requisitions for staffing events based on rules. Configure exit conditions on business processes affected by staffing events (such as *Hire* or *Change Job*) to determine when job requisitions are required. Example: Require job requisitions for hiring, but not on transfers or when adding jobs. If you don't configure exit conditions for a given business process, using job requisitions for staffing events within that process is optional. • None of the above: Disables job requisitions for supervisory	Steps: Manage Job Requisitions

Option	Description	More Information
	organizations that use position management. Note: If you're accounting for commitments on your open positions, you can't disable job requisitions for position management. You can still select Require Job Requisitions for all Position Management staffing events.	

Defaulting Behavior for Position Management Job Requisitions	• Default from most recently filled position on Create Job Requisition: Configures these fields to populate from the most recently filled position:
	  • Job Profile
	  • Primary Location
	  • Time Type
	  • Worker Sub-Type
	  • Worker Type
	• Default from Position Restriction on Create Job Requisition: Configures the same fields to populate from the position restriction when you create job requisitions from position restrictions and there's only 1 value for any given field.
		Steps: Manage Job Requisitions

Default Job Description and Job Description Summary from Job Profile	Configures the Job Description and Job Description Summary fields to populate from the job profile when creating a job requisition for an existing position.	Steps: Manage Job Requisitions
Enable Job Requisitions for Job Management	(Required for Recruiting) Supervisory organizations that use the job management staffing model can use job requisitions to fill openings.	Steps: Manage Job Requisitions
Enable Primary and Secondary Questionnaire Removal or Replacement on Evergreen and Job Requisitions	Enables you to remove or replace primary or secondary questionnaires on evergreen and job requisitions, even if candidates have already applied.	Steps: Set Up Questionnaires for Recruiting Change Questionnaires Assigned to Job Requisitions

Option	Description	More Information
Route Create Job Requisition Events	Note: This option is for Adaptive Planning only. Select security groups for routing Create Job Requisition events that are initiated in Adaptive Planning.	

Benefits

Option	Description	More Information
Default Event Type for Retirement Savings	Maps a *Benefit* event to the Change Retirement Savings related action. The event type you select determines the changes an employee can make to retirement savings plans. Workday reprocesses, puts on hold, or uses coordination of events for only those events that *don't* match the default event type.	Create Retirement Savings Plans
Include an additional HSA Coverage Target Option	(For HSA plans only) Enables *Other* as a target coverage option.	Steps: Set Up Employee Benefit Plans
IRS Limit for additional HSA Coverage Target Option	Enables you to select *Family* or *Employee* as the IRS limit for the additional HSA coverage target option. If you don't make a selection, Workday selects *Employee*. Available only if you select Include an additional HSA Coverage Target Option.	Steps: Set Up Employee Benefit Plans
Trigger Change Benefit Elections BP Step if Worker Changes Benefit Groups	Initiates the *Change Benefit Elections* and *Change Benefit Jobs* business process steps on any business process definition that uses them if a worker changes benefit groups.	Change Benefit Elections Steps: Set Up Multiple Jobs for Benefit Eligibility
Enable Zero Amount and Percentage Elections for Payroll Interface	Enables you to provide zero amount and percentage elections to Payroll Interface. Zero amount and percentage elections are ongoing elections that the worker can't waive.	Change Benefit Elections
Enable Mobile Benefits	Enables employees to select and submit enrollment elections using a mobile device. Adds the	Steps: Set Up Open Enrollment

Option	Description	More Information
	Benefits worklet to the device during open enrollment.	
Disable Emergency Contact, Dependent, and Beneficiary Linking	Disable linking between emergency contacts, dependents, and beneficiaries so that administrators and employees can add or delete them without overriding other relationships. When selected, Workday hides these options on the Add Dependent subtask during open enrollment: • Use an Existing Emergency Contact or Beneficiary option. • Use as Beneficiary check box. Workday also hides the *Add Beneficiary Using Existing Contact* option from the Add Beneficiary Using Existing Contact prompt on the Change Benefit Elections task.	Manage Personal Relationship Types Manage Dependents and Beneficiaries
Restrict Response Changes for Dependent Tobacco Use	Prevents workers from changing a dependent's tobacco use status with the Edit My Dependent task.	Set Up Benefit Enrollment Instructions Manage Dependents and Beneficiaries
Use Persisted Benefit Groups	Enables you to use stored eligibility information from the daily eligibility check for a worker. Improves performance for tasks, reports, and integrations that use the stored eligibility status for a benefit group.	Create Benefit Groups Change Wellness Data
Enable Coordination of Events for the Change Benefits Web Service	Reprocesses future events created through Workday, instead of an EIB or integration, if an earlier event is created using the *Change Benefits* web service.	Steps: Set Up Enrollment Events and Rules Concept: Coordination of Benefits Enrollment Events

Compensation

Option	Description	More Information
Enable Compensation Setup Segment Security	Enables you to divide access to compensation setup data among multiple Compensation Partners.	Set Up Segmented Security by Compensation Plans

Option	Description	More Information
	Example: A business with sites in Canada, the United States, and Mexico might require a separate Compensation Partner for each country.	
Hide Total Salary & Allowances	Hides total salary and allowances in worker profiles and related actions.	
Enable Actual End Date	Displays the Actual End Date field on the: • Rollout Compensation Plans to Employees task. • *Propose Compensation* step of business processes such as *Hire* and *Change Job*.	Roll Out Compensation Plans to Employees Propose Compensation for Employees or Positions
Enable Employee Visibility Date	Enables compensation administrators to select a future date after which employees signed in as Employee as Self can view their updated pay-related compensation data. If you configure the Employee Visibility Date, Workday hides updated pay-related compensation data from the worker until the date. If left blank, Workday uses the effective date of the process.	FAQ: Employee Visibility Date
Enable Multiple One-Time Payments	If selected, you can configure multiple one-time payments for an employee. Each payment can have different one-time payment plans and scheduled payment dates while sharing the same reason and effective date. If not selected, Workday prevents you from adding a one-time payment during the *Termination* process when the employee has a clawback payment.	Request One-Time Payments for Employees
Remove Prior Compensation for Rehires	Enables you to rehire previously terminated workers without reassigning or displaying compensation from their previous employment in the *Propose Compensation Hire* step of the *Hire* process.	Concept: Remove Prior Compensation for Rehires

Option	Description	More Information
Route Business Processes Based on Costing Overrides	If you use worktags on these business processes, Workday routes business process steps to the managers associated with the worktags: • *Period Activity Pay*. • *One-Time Payment for Referral*. • *Request One-Time Payment*. • *Request One-Time Payment Offer/Employment Agreement*. You can't disable this option after you select it and click OK.	Steps: Set Up Period Activity Pay
Use 100% FTE for Pay Range Comparisons	If selected, Workday divides part-time employee salary by the FTE % before comparing it to the salary range midpoint when calculating these fields: • Compa-Ratio • Position in Range • Pay Range Segment	Create Compensation Grades
Compa-Ratio Midpoint	• Use Calculated 50% Value: Workday uses the midpoint between the minimum and maximum of the grade range. • Use Configured Midpoint Value: Workday uses the configured midpoint of the range to calculate the compa-ratio.	Create Compensation Grades
Default Frequency	The default value for a compensation component frequency unless specified.	Create Frequencies
Disable Create New Compensation Review Statement functionality for Employee on View Compensation Review Statements	Hides the Create New Statement button on the View Compensation Review Statements view for Employee as Self.	Steps: Create Custom Compensation Review Statements
Preferred Compensation Review Employee Awards Grid Limit	Workday limits the number of employees belonging to the same organization hierarchy to display to a Planner during a Shared Participation Compensation Review. Workday uses this option if you set it to greater than zero.	Steps: Prepare for Compensation Reviews

Option	Description	More Information
	Otherwise, Workday uses the Default Compensation Review Employee Awards Grid Limit. If the number of employees in the organization hierarchy exceeds the limit, Workday displays a message instructing the Planner to refine search criteria. When the search criteria reduce the number of employees below the limit, Workday displays the grid.	
Enable Dynamic Display for Compensation Plan Sections	If selected, Workday displays only relevant compensation plan sections during the: *Propose Compensation Change* business process when used as a step on the *Change Job* business process. This applies to either an internal job change or an internal hire. Workday determines the relevant plan sections based on worker eligibility and the security permissions for the user performing the compensation change.	../../../human-capital-management/compensation/manage-compensation-plan-assignments/xoi1500481994162.dita
Run Eligibility Rules when there is Requisition Compensation	If configured, Workday runs eligibility rules during the selected business processes even when default compensation exists on the job requisition. Workday persists individual overrides from default compensation on the job requisition if the candidate is still eligible for the plan as of the hire date on the process.	FAQ: Compensation Defaulting
Enable Defaulting Based on Changes to Guidelines	If configured, enables you to apply compensation defaulting for compensation plan assignments when you both: • Base eligibility rules on Guidelines fields. • Change any field in the Guidelines section that the eligibility rules are based on.	FAQ: Compensation Defaulting

Option	Description	More Information
	Select the business processes you want to enable defaulting for: • *Add Additional Job (Propose Compensation Hire)* • *Change Job (Propose Compensation Change)* • *Employment Agreement (Propose Compensation Offer/Employment Agreement)* • *Hire (Propose Compensation Hire)* • *Job Requisition (Requisition Compensation)* • *Job Requisition Change (Requisition Compensation)* • *Offer (Propose Compensation Offer/ Employment Agreement)* Example: You enable this option for your relevant business processes, including the *Change Job (Propose Compensation Change)* business process, which you then initiate to propose a compensation change for a worker, Wendy. You update Wendy's grade manually. A compensation eligibility rule is based on the new grade that you selected on the Grade field. Workday applies compensation assignment defaulting based on Wendy's new grade. Workday formerly only enabled compensation defaulting based on guidelines for the *Change Job (Propose Compensation Change)* business process. If you had previously selected this option, Workday now displays the *Change Job (Propose Compensation Change)* business process as selected and all other business processes as unselected. You can update this setting to select additional business processes or to deselect the default option.	

Option	Description	More Information
Internal Compensation Benchmark Threshold	Enter the number of employees in outside organizations that a manager must have access to before Workday includes them for internal compensation benchmark calculation. A higher threshold value ensures the security of sensitive pay information. A low threshold value might enable a manager to deduce the pay of specific employees in outside organizations.	Steps: Configure Internal Compensation Benchmarks
Enable Eligibility Rule Performance Enhancement for Compensation Plan Profiles	If selected, Workday stops evaluating compensation plan profiles when it finds the first profile that the employee is eligible for. If an employee isn't eligible for any plan profiles, Workday uses the default plan target. If not selected, Workday evaluates all plan profiles. If an employee is eligible for only 1 plan profile, Workday uses it. If an employee isn't eligible for any plan profiles or is eligible for more than 1, Workday uses the default plan target. Selecting this option is permanent. You can't clear or undo your selection once you submit.	Setup Considerations: Compensation Eligibility Rules
Enable Total Rewards Data Visualization Card in the Benefits and Pay Hub	If selected, Workday displays the Total Rewards donut chart without masked monetary values in the Overview worklet of the Benefits and Pay hub. If you don't select this checkbox, Workday displays the Total Rewards Annual Compensation card with masked monetary values in the Overview section of the Benefits and Pay hub.	../../../human-capital-management/compensation/manage-compensation/mtl1658352925946.dita

Educational Institutions

Option	Description	More Information
Enable Educational Institution Features	Enables you to track academic pay.	Steps: Manage Academic Pay

Option	Description	More Information
Enable Period Activity	Enables you to pay employees for fixed-term activities and payment arrangements.	Steps: Set Up Period Activity Pay
Apply Payroll Costing Validations to Period Activity Pay Costing Overrides	If selected, any costing validations you configure on the Maintain Payroll Costing Validations task also apply to costing overrides on the Manage Period Activity Pay Assignments task.	Manage Period Activity Pay Assignments
Display Tenure Settings on Worker Profile: Job Details	Select to display these tenure fields on the worker profile Job Details report: • On Tenure Track • Tenured Faculty	Create Hiring Restrictions Steps: Manage Job Requisitions

Talent

Option	Description	More Information
Default Rating Scale	Populates employee review templates with this rating scale.	Create Rating Scales
Default Scale for Competency Assessment (3, 4, or 5 point scale)	The My Competency Rating Assessment report won't run until you configure a default scale. The report uses this scale to normalize all scales in the review before displaying the graph. The default scale must be a 3, 4, or 5 point scale. If using additional reviewers, the *Begin/End Range* values in the scale must be nonzero for the Additional Reviewer rating to display on the My Competency Rating Assessment graph. Workday averages these values because employee reviews can include many additional reviewers.	Start Employee Reviews
Talent Card for Talent Review Layout Override	Sets a custom layout for printing talent cards from a talent review. Overrides the Workday standard layout: • On the Print Talent Cards for Talent Review task. • When you print talent cards for talent reviews	Steps: Create Custom Talent Card Layouts

Option	Description	More Information
	from worker or talent profiles. Create the custom layout with Report Designer in Workday Studio.	
Talent Card for Worker Layout Override	Sets a custom layout for printing talent cards for individual workers, organizations, or talent pools. Overrides the Workday standard layout: • On the Print Talent Cards for Organization task. • On the Print Talent Card for Talent Pools task. • When you click View Talent Card on the worker or talent profiles. Create the custom layout with Report Designer in Workday Studio.	Steps: Create Custom Talent Card Layouts
Enabled Opportunities within Opportunity Marketplace	Determines which opportunities are available for employees to browse in the Opportunity Marketplace. This also enables Workday to use machine learning to provide employees: • Opportunity recommendations. • Match analysis to display how well their skills and interests fit an opportunity.	Steps: Set Up Talent Marketplace
Enable Learning within the Opportunity Marketplace	Enables Workday to suggest learning courses to employees viewing their match analysis with an opportunity. Workday makes course recommendations based on the skills requirements that an employee is missing.	Steps: Set Up Talent Marketplace
Default Job History Company	Populates the Company prompt for the *Manage Job History (Sub Process)* step on these business processes: • *Add Additional Job* • *Change Job* • *Hire* • *Title Change*	Steps: Set Up Job History

Option	Description	More Information
Enable Additional Details within Job Match Analysis	Provides users with more information about their skills and gaps related to the opportunity, and how they match with a job posting.	Steps: Set Up Career Hub
Restrict Suggested Jobs to User's Primary Location	Limits suggested jobs to the worker's primary location. Enabling this option overrides the Suggested Jobs options workers select in Opportunity Marketplace Preferences.	Steps: Set Up Talent Marketplace
Default Job History Company	Populates the Company prompt for the *Manage Job History (Sub Process)* step on these business processes: • *Add Additional Job* • *Change Job* • *Hire* • *Title Change*	Steps: Set Up Job History
Enable Employee Engagement in Manager Insights Hub	Enables Manager Insights Hub to display the Employee Engagement section when you use Workday Peakon Employee Voice. The Employee Engagement section displays these insights: • Engagement Score • Highlighted Drivers of Engagement • Latest Comments	Steps: Set Up Manager Insights Hub
Talent Highlights Help Text	Enables you to add help text to the Generate Talent Highlights for Employee and View Talent Highlight tasks.	Steps: Set Up Talent Highlights
Talent Highlights Location Exclusion	Enables you to exclude locations from Talent Highlights. Employees with an active primary or additional position in an excluded location are ineligible for Talent Highlights.	Steps: Set Up Talent Highlights
Talent Highlights Location Hierarchy Exclusion	Enables you to exclude location hierarchies from Talent Highlights. Employees with an active primary or additional position within an excluded location hierarchy are ineligible for Talent Highlights.	Steps: Set Up Talent Highlights

Option	Description	More Information
Development Item Help Text	Enter text to replace the default help text that appears during the Create Development Item and Generate Development Item tasks when GenAI development items are enabled.	Steps: Set Up Career Hub
GenAI Development Items Location Exclusion	Employees with a primary or additional position in these locations will not be able to access GenAI development items.	Steps: Set Up Career Hub
GenAI Development Items Hierarchy Exclusion	Employees with a primary or additional position within these regions will not be able to access GenAI development items.	Steps: Set Up Career Hub

Org Chart

Option	Description	More Information
Enable User Facing Filters	Enables users to hide contingent workers and open positions on the Org Chart. The fields you select here will be automatically removed from the Always Hide option.	../../organizations/lah1480533274925.dita
Always Hide	Prevents users from viewing these items on the Org Chart: • Contingent workers. • Open positions. • A side panel that displays matrix or supervisory organizations that the worker belongs to.	../../organizations/lah1480533274925.dita

Payroll Interface

Option	Description	More Information
Supported Countries	Enables you to assign selected countries to a pay group by accessing the View Pay Group report. Select Organization > Edit Organization from the related actions menu of the pay group, and select a value in the Country field.	Create Pay Group for Third-Party Payroll
Enable External Payroll Code	Enables duplicate external codes for earnings and	Manage External Payroll Earnings

Option	Description	More Information
	deductions, providing flexibility when an external payroll system doesn't use unique codes. Displays an External Payroll Code column on the Maintain External Payroll Earnings and Maintain External Payroll Deductions tasks where you can specify the duplicate external codes.	
Enable Next Payment Date for External Payslips	Enables you to display Next Payment Date for external payslips on mobile. This option provides employees with clear information about their upcoming payment date.	Steps: Set Up Import External Payslips Integration Steps: Set Up External Payroll Documents Integration
Enable Dynamic Membership Rule Evaluation Optimization	Enables Workday to generate semi-dynamic relationships for dynamic membership rules to help performance for Cloud Connect for Third-Party Payroll (CCTPP) integrations. Dynamic membership rules remain dynamic. CCTPP integrations reference the semi-dynamic relationship to evaluate membership and eligibility rules once Workday populates the date and time. We recommend you enable this option for these integrations: • *Payroll Effective Change Interface* • *Worker Effective Change Interface* After you enable the new check box and Workday completes the initial generation of semi-dynamic relationships for dynamic membership rules, Workday displays the Optimization Start DateTime next to the check box on the Edit Tenant Setup - HCM task. Workday doesn't continue to update the date/time, but reevaluates memberships every 4 hours just like semi-dynamic membership rules. When you deselect the Enable Dynamic Membership Rule	../../../integrations/Global-Payroll-Connect/Payroll-Interfaces/payroll-effective-change-interface-connector/jas1414779774550.dita ../../../integrations/Global-Payroll-Connect/worker-effective-change-interface/hvf1527005454622.dita

Option	Description	More Information
	Evaluation Optimization check box, Workday removes the semi-dynamic relationships for dynamic membership rules and the Optimization Start DateTime.	
Restrict Constrained Security Groups Access to External Payroll Documents	Enables you to limit the access of constrained role-based security groups to workers' external payroll documents based on pay group or organization.	../../../integrations/Global-Payroll-Connect/External-Payroll-Documents-and-Results/external-payroll-documents/set-up-contextual-security-for-external-payroll-documents.dita

Leave of Absence

Option	Description	More Information
Allow Job Overlap for Leave	Enables you to overlap workers in the same position when the incumbent starts a leave of absence. Automatically applies to any position filled by a worker who goes on leave.	Concept: Job Overlap
Leave Case Number Sequence Generator	Enables you to set up a sequence generator for the Case Number report field to automatically assign case numbers to leave events.	Create ID Definitions and Sequence Generators on page 12

Time Off

Option	Description	More Information
Edit Time Off Type	Enables workers to change the time off type when they correct an approved time off request.	Correct Approved Time Off Requests
Disable Absence Calendar Balance Totals	Select to hide the Total field in the balances sidebar of these calendars: • Correct Absence • Correct My Absence • Enter Absence • Request Absence	
Disable Absence Worklet Balances	Select to hide workers' available balances on these worklets: • Time Off • Absence	
Maximum Days Allowed for Time Off Requests	Enter the maximum number of days allowed for each time off request. The default limit is 730	

Option	Description	More Information
	days. To optimize performance, we recommend that you enter a number less than 730.	
Number of Months	Note: Enter a value into this field only when instructed to do so by Professional Services.	
Balances as of date in the New Absence Calendar Experience	Select either of these options to set the Balances as of Date value on the Request Absence task and Manage Absence report: • *Balances as of today* • *Balance as of end of calendar year*	
Remove Absence Setup Component 12-Month Effective Date Limit	Enables you to edit absence setup components like time off, time off plan, or accrual with an effective date older than 12 months.	Concept: Effective Dating for Absence
Enable Quantity per Occurrence on Absence Table Tiers	Select to display the Quantity per Occurrence column on these tasks: • Create Absence Table • Edit Absence Table	Create Absence Tables
Enable Time Off and Leave Label for Absence Events	By default, this check box isn't selected. When you select this check box, Workday changes the label for events related to time off and leave of absence. The Absence label of report fields on these business objects are automatically replaced with Time Off or Leave: • Leave Request Event • Leave Return Event • Time Off Event • Time Off Request Event • Worker Business Process You'll also notice the label change in any custom reports and integrations that use any of the report fields on the business objects. Example: When you select the check box, Workday replaces the Absence label of report fields on the relevant business objects with:	Reference: Absence Calendar Experience Comparison

Option	Description	More Information
	• Leave on leave events, such as: ◦ Absence Request: Kevin Turner (On Leave) displays as Leave Request: Kevin Turner (On Leave). ◦ Absence Return for Kevin Turner displays as Leave Return for Kevin Turner. • Time Off on time off events, such as: ◦ Absence Correction: Kevin Turner displays as Time Off Correction: Kevin Turner. ◦ Absence Request: Kevin Turner displays as Time Off Request: Kevin Turner.	

Time Off: Threshold

Option	Description	More Information
Display Absence Thresholds	Set up how absence threshold data displays on absence calendars and tasks. Display absence threshold values as: • *Display Name Only* • *Numbers* • *Percentage* Select Display when Threshold % is greater than or equal to sets the threshold limit that must be met before the threshold displays.	Steps: Set Up Absence Thresholds.

Time Tracking

Option	Description	More Information
Defer Time Clock Event Processing	Postpones matching collected time clock events from the time clock or mobile check-in or check-out to a later time.	Steps: Defer Time Clock Event Matching

Option	Description	More Information
	Deferring processing improves Time Tracking efficiency if you have a large number of workers creating time clock events at the same time. This improvement doesn't apply to time clock events imported through a web service. Note: Workday plans to retire the Defer Time Clock Event Processing in a future release. Enabling this feature could impact performance in your tenant. Contact Workday Professional Services before using this feature.	
Use Automated Scheduling	Automatically schedules and runs the *Process Time From Events* job in the background every 15 minutes. Available when you defer time clock event processing.	Steps: Defer Time Clock Event Matching
Run Calculations with Time Off Approval	Automatically runs time calculations when approving a time off request for the weeks containing the time off request.	Concept: Time Calculations
Run Calculations after Date	Automatically runs time calculations only for the weeks where the time off date is on or after the specified date. Available only if you select Run Calculations with Time Off Approval.	Concept: Time Calculations
Enable Standard Mobile Check-In	Enables mobile users to enter time types, worktags, and comments for check-ins and select reasons for check-outs.	Steps: Enable Time Tracking for Mobile
Position Display Options	Select a display option for time entry, time approval, and position-based time off requests. Selecting an option helps multiposition workers and their time approvers to differentiate between positions.	
Additional Info on Position Display	Select to display the worker's location or supervisory organization during time entry, time approval, and on position-based time off requests.	

Option	Description	More Information
Run Time Calculation Eligibility Day by Day	Evaluates worker eligibility for time calculations daily. We recommend you set up the Country / Country Region prompt on the time calculation groups to limit the performance impact before you select this check box.	• Concept: Daily Evaluation of Worker Eligibility for Time Calculations • Concept: Time Calculations
Start Daily Evaluation on Date	When you select a date in the middle of the week, daily evaluation applies to the entire week. Available only if you select Run Time Calculation Eligibility Day by Day.	• Concept: Daily Evaluation of Worker Eligibility for Time Calculations • Concept: Time Calculations
Enable Mass Time Requests	Enable managers and administrators to submit a single time request to cover multiple workers.	Concept: Time Requests

Learning

When you update Learning settings, Workday processes requests for up to 5 minutes before the changes take effect in your tenant.

Option	Description	More Information
Enable Rating on Learning Content	Enables users to rate all content that they've enrolled in and any stand-alone lessons within the learning catalog.	Steps: Set Up Learning
Enable Security Categories	Displays a Security Category prompt on these tasks, enabling you to restrict access by security category segment: • Create Course • Create Program • Edit Course • Edit Program	Steps: Maintain Access to Learning Content
Enable Express Interest	Adds an Express Interest button to the View Course report for course offerings unless you select the Disable Express Interest check box on these tasks: • Create Course • Edit Course This option enables users to express interest in courses	Steps: Set Up Express Interest for Learning Courses

Option	Description	More Information
	when there are no suitable offerings available to them in a specified location and date range.	
Enable Learning Paths	Displays an Add to drop-down menu on these reports, enabling learners to add content to learning paths: • View Course • View Digital Course • View Learning Lesson	
Enable Language Preferences	Allows learners to set their preferred languages for content displayed in learning recommendation sliders, Career Hub, Manager Insights Hub, and Opportunity Graph.	Set Up Language Preferences for Learning Recommendations
Enable View Content Again On Successful Completion	Updates the course overview page to: • Display a View Course Again button when a learner successfully completes a course or if there aren't open offerings available to retake it. • Display a Retake Course button when a learner fails a course and there are open offerings available. • Enable learners to click on lessons once they have an active enrollment. The lesson list isn't interactive for expired courses or when retraining is due. This check box is selected by default. Clear the check box if you prefer: • Workday to display the Retake Course button regardless of whether the learner passes or fails as long as there are open offering available. • Lesson lists aren't interactive.	

Option	Description	More Information
Time Zone for Training Credit Mappings	Controls the time zone in which new training credit mappings become effective. If you don't select a time zone, Workday uses Pacific time.	Steps: Set Up Pricing for Learning
Enable Pricing Configuration for Person Types	Enables pricing configuration for workers and extended enterprise learners. Once enabled for at least 1 person type, you can configure: • Learning organization payment configurations. • Pricing rules. • Prices for individual courses and course offerings. • Training credit mappings.	Steps: Set Up Pricing for Learning
Enable Related Content Recommendations	Enables you to display the You Might Also Be Interested In worklet on learning courses.	Steps: Set Up Machine Learning for Learning Recommendations
Select Virtual Classroom Integrations	Enables you to select a Microsoft Teams or Zoom integration. Selecting a Microsoft Teams or Zoom integration displays these 2 fields and check box, which you can use to track attendance for your virtual classroom: • Minimum Percentage for Full Attendance • Minimum Percentage for Partial Attendance • Track Non-Attendance for Virtual Classroom	FAQ: Attendance Synchronization for Virtual Classroom Integration with Microsoft Teams and Zoom
Enable Calendar Integration	Enables you to automatically send calendar invites when you schedule classroom training and webinars in course offerings. This functionality integrates with Microsoft Outlook or Google Calendar, and enables you to send invites to any email client.	Configure Microsoft Outlook Calendar for Learning
Disable AI Summarized Feedback	Hides the AI Summarized Feedback tab on the administrator view of the learning content and disables the ability to generate summaries of employee	

Option	Description	More Information
	feedback for the learning content.	

Packaged Content

Option	Description	More Information
Enable Packaged Content	Enables you to upload packaged media content in course lessons.	Create Learning Courses
Enable Packaged Content on Mobile	Enables users to view packaged content for learning lessons on: • Android • iOS	Concept: Mobile Devices and Features on page 192
Enable Packaged Content Interaction Reporting	Enables you to report on learner responses in courses that contain media lessons with packaged content. This setting applies to interaction response data for new completions of packaged content going forward.	
Enable Completion Without Exit for SCORM 2004 Enable Completion Without Exit for SCORM 1.X Enable Completion Without Exit for AICC	Enables lesson status to be marked as complete as soon as Workday receives the status event from the packaged content.	FAQ: Packaged Content
Align Workday and Packaged Content Sessions	Enables you to align Workday and packaged content sessions so that both remain active while learners consume packaged content.	FAQ: Packaged Content
Send Learner Name to Third-Content Provider	Enables you to opt into the Learner Name feature for packaged content. When you select this check box, it displays these options: • Display Learner ID • Display Learner Name The steps for enabling this feature depend on your organization's subscription service agreement.	

Learning: Extended Enterprise

Option	Description	More Information
Enable Self-Service Time Zone Management for Extended Enterprise	Displays a Preferred Time Zone prompt on the Preferences task on the Learning dashboard for Extended Enterprise Learners. When enabled, each user can select the time zone they want Workday to use when processing expiration rules for course enrollments.	Create Extended Enterprise Learners

Data Entry Check Options

Switch on Data Entry Check everywhere	If selected (default), Workday enables the Data Entry Check (DEC) functionality for HCM. If you want to use DEC for only select items, select Select areas to switch on Data Entry Check and configure which items to enable for DEC.	• ../../../human-capital-management/compensation/set-up-compensation-reviews/steps--configure-compensation-review-grid-profiles1.dita • ../../../human-capital-management/compensation/one-time-payment-plans/dan1370796595716.dita

Generative AI

Opt Out of Workday Writing Prompts - Workforce	Enables you to opt out of generative AI writing assistance prompts on the rich text editor within certain tasks across HCM.	2025R2 Feature Release Note: Workday Writing Prompts for Rich Text Editor

Related Information

Concepts

Concept: Organization Charts on page 863

Concept: Membership Rules on page 880

Tasks

Set Up Supervisory Organizations on page 840

Steps: Set Up Org Studio on page 888

Steps: Assign Membership Rules in Custom Organizations on page 874

Manage Membership Rules on page 879

Reference

2020R1 What’s New Post: Enrollment Events Redesign

2021R1 What's New Post: Move Team with Manager

2021R2 What's New Post: Correct Supervisory Organization on Hire

The Next Level: PATT Touchpoints with Assignments

Reference: Edit Tenant Setup - Help

Manage tenant-wide settings for Workday Help.

Option	Description	More Information
ID Sequence Generators	The format for sequential case IDs.	dan1370796358261.dita
Messages	The brief message that displays when a user creates a confidential case. The default message is 'This case is confidential. Only a select group of case solvers can access this case.' You can accept the default or specify a custom confidential case message of your own.	
Notifications	Specifies whether case notifications include potentially sensitive information or are limited to recording case actions.	
Case Solver Visibility	Specifies whether case solvers have access to nonconfidential cases that they create, regardless of which teams the cases are routed to.	
Case Sharing	Specifies whether case solvers can share nonconfidential cases with other active Workday workers who aren't members of the Help service teams. Note: Workers outside of the service team require domain access to add messages or internal notes to a case that a case solver shared with them.	
Case Type and Service Category	Specifies whether case types display either a high or more granular level of detail when creating a case. Note: The mobile app doesn't support the display of case type descriptions. Additionally, Workday Assistant doesn't support the option to group case types at a granular level.	
Email Case Creation	• Specifies if external users can create cases by email.	Steps: Set Up Email Case Creation

Option	Description	More Information

	• Specifies the email address that Workday uses to create a case.
	  ◦ If you select Use the Original Sender as the Case Creator, Workday creates a case for the contact who initially sent the email (the original sender).
	  ◦ If you select Use the most recent sender in the email ingestion delivery chain as the case creator, Workday creates a case for the most recent email address that forwarded or redirected the email.
	• Specifies email addresses that Workday excludes as case creators when using the Use the most recent sender in the email ingestion delivery chain as the case creator email case creation option.
	• Enables you to manually assign a case owner if the case owner can't be easily identified.	

External Cases	Specifies the default case type for cases created by email. Note: You must specify a default case type in this field to enable case creation by email functionality.	
Case Communication	Specifies if users can communicate with case solvers by email.	
Case Linking	Specifies whether case solvers can link cases together.	
External Record Linking	Specifies whether you can link external cases from other	

Option	Description	More Information
	systems to Help cases using the External Records REST APIs.	
Business Process Case Creation	Specifies the default external case contact for cases created by a business process. If a business process fails to add an external case contact as a case creator, Workday uses the contact defined in this field as the case creator and enables the business process to move forward.	
Information Message on Create Case	Specifies the custom text and Knowledge article that displays for users on theCreate Case task when creating a new case.	
Reopen Cases	Specifies whether case owners can reopen resolved cases from the Help Center. If enabled, case owners can reopen case resolved for less than 7 days. This option does not apply to external case owners.	
AI Features	Specifies whether article authors can use the AI Article Summarization and AI Article Translation features.	• ../../../human-capital-management/hcm-innovation-services/workday-help/knowledge-management/summarize-articles-with-ai.dita • ../../../human-capital-management/hcm-innovation-services/workday-help/knowledge-management/translate-a-help-article-with-ai.dita
Audience Evaluation	Specifies whether Workday indexes your Knowledge article users and articles audiences. If enabled, Workday retrieves an article and determines if the active user has permission to view that specific article more quickly.	

Related Information

Reference

2021R1 What's New Post: Case Visibility

2021R2 What's New Post: Case Collaboration

2021R2 What's New Post: Categorized Case Types

2023R1 What's New Post: Case Communication by Email

2023R1 What's New Post: Case Linking
2024R2 Feature Release Note: Case Owners Can Reopen Cases

Reference: Edit Tenant Setup - Integrations

Manage tenant-wide settings for integrations.

Studio Settings

Option	Description	More Information
Require Source Code	Requires you to include Studio source code when you deploy Studio integrations to your tenant.	

Integration Subscription Settings

Option	Description	More Information
Disable Integration Subscriptions	Disables integration subscription notifications for all integration systems in your tenant.	

Integration Processing Priority Guidelines

Option	Description	More Information
• High Priority. • Medium Priority. • Low Priority.	• Workday prioritizes integration events that don't meet the criteria for any rule as Medium. • Priority is relative. If you configure all integrations with high priority, Workday prioritizes the integrations as if you configure all integrations with low priority. • Workday can allocate resources without regard to priority if resources are available. • You can't add more than 15 priority configurations across all priority levels. • Workday doesn't apply these rules to deprecated or retired templates.	
Categorization	Select the category of integration that you want to apply the priority to.	

Option	Description	More Information
Value	Select one or more integration items based on the categorization.	
Trigger	Select the schedule trigger type.	

Reference: Edit Tenant Setup - Notifications

Manage tenant-wide settings for notifications in these areas:

- Default Email Settings on page 107
- Email Compliance on page 108
- General Email Notification Settings on page 109
- General Notification Restrictions on page 111
- Reminder Settings on page 113
- SMS Compliance on page 114
- Mobile App Notification Settings on page 114
- Notification Delivery Settings on page 115

Default Email Settings

Workday sends notifications in the language that the recipient specifies as their default locale preference. If no translation is available, Workday sends notifications in the base language of the tenant.

Option	Description	More Information
Default SMTP Configuration	Sets a default Simple Mail Transfer Protocol (SMTP) server configuration for Workday email notifications. You can select an existing email server configuration or create a new configuration from the prompt. When you set a *Customer SMTP* configuration, Workday delivers all emails using the Inbound Integrations IP addresses. You can configure different Customer SMTP configurations to use on custom business process notifications. When you select the Customer SMTP configuration on the notification, Workday displays the From Address you specify in the Customer SMTP configuration as the sent From email address.	Set Up Mail Servers for Email Notifications on page 260
Daily Digest SMTP Configuration	(Optional) Sets a different SMTP server configuration to use for daily digest email notifications. You can select an existing server configuration or create a new configuration from the prompt.	Set Up Mail Servers for Email Notifications on page 260

Option	Description	More Information
	Recipients of daily digest emails receive a link that directs them to your Workday tenant. Workday recommends that you only send daily digest emails to internal workers. When you set a *Customer SMTP* configuration, Workday delivers all emails using the Inbound Integrations IP addresses.	
Daily Digest Start Time	The start time for generating daily digest emails is based on either the Default Timezone of your tenant, if configured, or Pacific Time. A Daily Digest email lists new notifications, triggered in the last 24 hours, for all notification types selected for the daily digest. Workday doesn't send a separate Daily Digest email for each notification type. Workday limits Daily Digests emails to 50 action items and 50 notification items. When there are more than 50 action or notification items, Workday includes a link to the remaining items within the notification. To avoid Daily Digest email generation interference from your maintenance window, Workday recommends that you select a start time that corresponds with the end of your maintenance window. Example: When your maintenance window starts at 02:00:00 and lasts for 4 hours, select 06:00:00 as your Daily Digest Start Time.	

Email Compliance

Option	Description	More Information
Email Footer Company Address	Sets the address to display in the footer of Workday email notifications: • For recipients who have a Workday account,	Enable Candidates to Unsubscribe from Marketing Notifications

Option	Description	More Information
	the Workday address displays as the company address if left blank. • For recipients who don't have a Workday account, nothing displays for the company address if left blank.	
Email Footer Company Name	Sets the company name to display in the footer of Workday email notifications: • For recipients who have a Workday account, *Workday* displays as the company name if left blank. • For recipients who don't have a Workday account, nothing displays for the company name if left blank.	Enable Candidates to Unsubscribe from Marketing Notifications
Unsubscribe Page Display Text	Text that displays on the configurable email unsubscribe page when recipients click the Unsubscribe link. The unsubscribe link displays in email notifications sent to recipients who don't have a Workday account. Examples of notification types that can display the unsubscribe link include: • Recruiting Marketing • Student: Nontransactional External email client user interfaces can also display a one-click unsubscribe feature for Workday marketing email notifications. One-click unsubscribe enables recipients to unsubscribe from the type of email notification they received.	Enable Candidates to Unsubscribe from Marketing Notifications

General Email Notification Settings

Add a Restriction (or a set of restrictions) to disable or redirect email notifications.

When you add any email restriction, recipients copied on campaign item reminders don't receive the email notification.

Note: Ensure that no campaigns or processes are running before you create or update a restriction to disable or redirect notifications in a non-Production tenant. Updates that occur while notifications are being processed can have unintended consequences, such as causing notifications to be sent to the actual recipient instead of the redirect recipient during testing. To ensure no processes are running during your update, you can create a restriction for a non-Production tenant in your Production tenant, and then request a tenant refresh from Production to non-Production. This ensures the restriction is applied correctly to your non-Production email notifications.

Option	Description	More Information
Channel	Select *Email*.	
Disable All Notifications	Disables all email notifications, including security authentication notifications configured on the Edit Tenant Setup - Security task. Note: Workday won't send One Time Passcode (OTP) emails to users for multifactor authentication if you select Disable All Emails. This setting doesn't affect One Time Passcode - SMS multifactor authentication, however.	Reference: Edit Tenant Setup - Security on page 144
Redirect All Notifications to Contact	Enables you to test your email notifications by sending all notifications to the specified person.	
Redirect All Emails to Email Address	Enables you to test your email notifications by sending all emails to the specified address.	
OMS Environment Selected for Restriction	If you don't select an environment, the restriction applies only to the current environment you're using. Select 1 or more environments if you want the restriction applied to other environments that receive a tenant refresh from the current environment. If you also want the restriction to apply to the current environment, select it from the prompt in addition to the other environments that you selected. Example: Your company does a weekly refresh from Production to your Implementation Preview and Sandbox Preview environments. You want to ensure that test email notifications from your non-Production environments don't get sent to your customers after a Production refresh. In your	

Option	Description	More Information
	Production environment, you create a restriction that redirects all email notifications to a specified email address in your Implementation Preview and Sandbox Preview environments by selecting the *IMPL* and *SANDBOX* options from the OMS Environment Selected for Restriction prompt. When these environments receive a refresh from Production, Workday applies the restriction you set up, causing email notifications to be redirected rather than sent to customers. Note: To apply the notification restrictions to your Sandbox Preview or Implementation Preview tenants, select *SANDBOX* or *IMPL* respectively. Those environments also apply to the respective preview tenants.	
Preview Only	Applies the environment restriction to Preview tenants only. Predefine different configuration settings for the Sandbox and Sandbox Preview tenants to keep the Sandbox Preview tenant settings each time your Production tenant refreshes this tenant. Selecting the Preview Only check box has no effect if you are in the PROD environment.	

General Notification Restrictions

Add a Restriction (or a set of restrictions) to disable or redirect email and SMS notifications.

When you add any email restriction, recipients copied on campaign item reminders don't receive the email notification.

Note: Ensure that no campaigns or processes are running before you create or update a restriction to disable or redirect notifications in a non-Production tenant. Updates that occur while notifications are being processed can have unintended consequences, such as causing notifications to be sent to the actual recipient instead of the redirect recipient during testing. To ensure no processes are running during your update, you can create a restriction for a non-Production tenant in your Production tenant, and then request a tenant refresh from Production to non-Production. This ensures the restriction is applied correctly to your non-Production notifications.

Option	Description	More Information
Channel	Select either *Email* or *SMS*.	
Disable All Notifications	Disables all email and SMS notifications, including security authentication notifications configured on the Edit Tenant Setup - Security task. Note: Workday won't send One Time Passcode (OTP) emails to users for multifactor authentication if you select Disable All Emails. This setting doesn't affect One Time Passcode - SMS multifactor authentication, however.	Reference: Edit Tenant Setup - Security on page 144
Redirect All Notifications to Contact	Enables you to test your email and SMS notifications by sending all notifications to the specified person. For SMS notifications, you must use a mobile phone number, including the country code, for which you have an active one-way messaging configuration.	Steps: Set Up Workday Messaging on page 296
Redirect All Emails to Email Address	Enables you to test your email notifications by sending all emails to the specified address.	
Redirect All Notifications to Phone Number (Include Country Phone Code)	Enables you to test your SMS notifications by sending all SMS notifications to a specified mobile phone number. Include the country code in addition to the mobile phone number for which you have an active one-way messaging configuration.	Steps: Set Up Workday Messaging on page 296
OMS Environment Selected for Restriction	If you don't select an environment, the restriction applies only to the current environment you're using. Select 1 or more environments if you want the restriction applied to other environments that receive a tenant refresh from the current environment. If you also want the restriction to apply to the current environment, select it from the prompt in addition to the other environments that you selected.	

Option	Description	More Information
	Example: Your company does a weekly refresh from Production to your Implementation Preview and Sandbox Preview environments. You want to ensure that test email notifications from your non-Production environments don't get sent to your customers after a Production refresh. In your Production environment, you create a restriction that redirects all email notifications to a specified email address in your Implementation Preview and Sandbox Preview environments by selecting the *IMPL* and *SANDBOX* options from the OMS Environment Selected for Restriction prompt. When these environments receive a refresh from Production, Workday applies the restriction you set up, causing email notifications to be redirected rather than sent to customers. Note: To apply the notification restrictions to your Sandbox Preview or Implementation Preview tenants, select *SANDBOX* or *IMPL* respectively. Those environments also apply to the respective preview tenants.	
Preview Only	Applies the environment restriction to Preview tenants only. Predefine different configuration settings for the Sandbox and Sandbox Preview tenants to keep the Sandbox Preview tenant settings each time your Production tenant refreshes this tenant. Selecting the Preview Only check box has no effect if you are in the PROD environment.	

Reminder Settings

Option	Description	More Information
Enable Reminders	Enables you to configure reminder notifications for:	Create Campaigns on page 1373

Option	Description	More Information
	• Campaign items. • Learning courses and lessons. • Personal reminders. • Recruiting Candidate Reminders.	
Campaign Reminder Sync Hour	When you enable reminders, you can select an hour, using the Pacific Standard Time (PST) time zone, for Workday to use each day to sync campaign item reminder data.	

SMS Compliance

Option	Description	More Information
Customer Name	Enter your customer name to let recipients know who a message is from.	
Default Terms and Conditions	Enter the terms and conditions that Workday displays when a recipient opts in to SMS messaging.	
Agreement Consent	Workday defines the agreement consent language and you can't edit it.	

Mobile App Notification Settings

Option	Description	More Information
Enable Apple Push Notifications	Enables you to select Apple Push Notification as a notification channel for all parent notification types and individual notification types.	Set Up Mobile Push Notifications on page 191
Enable Google Cloud Messaging	Enables you to select Google Cloud Messaging as a notification channel for all parent notification types and individual notification types.	Set Up Mobile Push Notifications on page 191
Environment(s)	Restricts mobile push notifications to the selected environments. If you don't select any environments here, we enable mobile push notifications for all environments. Note: To apply the mobile app push notification settings	

Option	Description	More Information
	to your Sandbox Preview or Implementation Preview tenants, select *SANDBOX* or *IMPL* respectively. Those environments also apply to the respective preview tenants.	

Notification Delivery Settings

Parent notification type settings apply to all notification types under the selected parent notification type, unless you override settings for individual notification types.

Option	Description	More Information
Routing - Rule	Enables you to use a notification routing rule for all notification types under the parent. You can use the default rule in Workday for each parent notification type, or you can create your own.	Create Notification Routing Rules on page 252 Concept: Notifications on page 256
Delivery Override - Channel	(Optional) Enables you to select a notification channel for which you want to override the routing rule delivery configuration.	
Delivery Override - Configuration	(Optional) Overrides the Simple Mail Transfer Protocol (SMTP) server configuration for any email notifications under the parent. You can select an existing server configuration or create a new configuration.	Set Up Mail Servers for Email Notifications on page 260

Override parent notification type delivery settings for individual notification types with these settings.

Option	Description	More Information
Notification Type	The individual notification types under each parent notification type.	Concept: Notifications on page 256 Reference: Notification Types for Student Steps: Set Up Time Off Notifications
Override Notification Parent Type Settings	Enables you to override the routing rule made at the parent level for this particular notification type.	
Routing - Rule	When you select the Override Notification Parent Type Settings check box, you can select a routing rule that overrides the parent notification type routing rule. You can select	Create Notification Routing Rules on page 252 Concept: Notifications on page 256

Option	Description	More Information
	the Workday default routing rule for each individual notification type, or create your own.	
Delivery Override - Channel	(Optional) Enables you to select a notification channel for which you want to override the routing rule delivery configuration.	
Delivery Override - Configuration	(Optional) Overrides the Simple Mail Transfer Protocol (SMTP) server configuration for email notifications of this individual notification type. You can select an existing email server configuration or create a new configuration.	Set Up Mail Servers for Email Notifications on page 260

Reference: Edit Tenant Setup - Payroll

Manage tenant-wide settings for Workday Payroll in these areas:

Enabled Countries

Option	Description	More Information
Enabled Countries	Sets the countries where you're licensed and planning to use Workday Payroll. Also determines the values available in the Countries field on various payroll tasks and reports.	

Payroll Input

Option	Description	More Information
Proposed End Date for Ending Payroll Inputs	Select the date to suggest for the Proposed End Date on the	Steps: Set Up End Payroll Inputs for Terminated Workers

Option	Description	More Information
	End Payroll Inputs task. When you don't select any values, Workday uses the later of the: • Pay through date. • End date of the worker's last completed pay period. When you run the task, you can edit the date as needed.	
Payroll Web Services - Do Not Allow Add/Update for Worker as Self	Prevents workers from uploading payroll input for themselves when they run Enterprise Interface Builder (EIB) integrations using any of these web services: • Import Payroll Input. • Import Payroll Off-Cycle Payment. • Put Payroll Off-cycle Payment. • Submit Payroll Input.	

Pay / Retro Calculations

Option	Description	More Information
Enable Continuous Payroll Calculation	Enables Workday to recalculate on-cycle payroll results automatically as pay-impacting events occur. Applies only to regular run categories.	Setup Considerations: Continuous Payroll Calculation
Pay Component Proration for Multiple Jobs	When a pay calculation includes a midperiod company or pay group transfer and you: • Select the check box, pay component proration occurs and Workday creates Gross-To-Net (GTN) results for each combination of companies and pay groups that you configure for the entire pay period of the pay group. • Don't select the check box, GTN proration occurs. This is the default configuration and only applies to the worker's primary position. Additional positions	

Option	Description	More Information
	continue pay component proration with the default configuration.	
Lock Pay Groups To Block All Pay Calculations on Payroll Results	When you enable the check box, all on-cycle payroll results must be in *In Progress* status to lock the pay group detail, and a pay group detail must be locked to run pay complete. On-cycle, off-cycle, and retro can't be calculated, canceled, or completed; and pay accounting can't be run for a locked pay group. Also, you can't complete individual on-cycle results, you can only run pay complete for the entire pay group. Note: If you're a professional employer organization or you want a restrictive workflow for processing payroll, you must enable this check box. If you want the Payroll Processor or Administrator to run payroll caclulations while the pay group detail is locked, you shouldn't enable this check box.	Steps: Set Up Pay Group Lock for Auditing
Maximum Months Allowed For Retro Processing	Defines the maximum number of months to consider when processing retro transactions. Enter a number between 1 and 72. Example: When set to 24, Workday processes retro transactions up to 24 months in the past. For optimized performance, Workday recommends that you enter a period of 24 months or less. After a retro pay calculation, Workday advances a worker's No Retro Processing Prior To (NRPPT) Date to respect the maximum number of months for retro processing. Workday finds the current period start date of a worker's primary pay group and sets the NRPPT date to the date that precedes the current period start date by the number of months you define.	

Option	Description	More Information
Maximum Months Allowed For Terminated Worker Retro Processing	Defines the maximum number of months to consider when processing retro transactions for terminated workers. Enter a number between 1 and 72. Example: When set to 24, Workday processes retro transactions up to 24 months in the past. For optimized performance, Workday recommends that you enter a period of 24 months or less. After a retro pay calculation, Workday advances a worker's No Retro Processing Prior To (NRPPT) Date to respect the maximum number of months for retro processing. Workday finds the current period start date of a worker's primary pay group and sets the NRPPT date to the date that precedes the current period start date by the number of months you define.	
Enable Retro Processing in Primary Pay Group	For workers with retro differences from other pay groups, brings these differences into the pay results of their primary pay group.	Concept: Retro Events from Other Pay Groups

Exclude Current Period Completed On Demand Additional Results	When you calculate retro for a completed on-demand additional payment with a supported retro event in the current period:
	
	• With the check box selected, Workday:
	    • Doesn't evaluate the completed on-demand additional results in the current period when determining which periods to process.
	    • Doesn’t list the supported events as unprocessed in retro reports.	

Option	Description	More Information

	• With the check box deselected, Workday:
	  ◦ Evaluates the completed on-demand additional results in the current period.
	  ◦ Lists the supported events as unprocessed in retro reports.
	  ◦ Processes the event during pay calculation in the current period on-cycle.
	
	Workday recommends that you select this check box to avoid unnecessary auditing of unprocessed retro entries.
	
	Example: As a payroll administrator, you select the check box. You then calculate and complete an on-demand additional payment for a worker in the current period 6/1 - 6/15. The worker has approved time entry or time off for the current period and then you run retro pay calculation. Workday doesn't evaluate or list the time entry or time off event as an unprocessed event in retro reports.	

Disable Automatic Retro Differences Processing for Non-Active Workers	Disables processing of pay components with retro differences for terminated workers or workers on leave in the scope of the run category. Select this check box to use your pay component configuration on the Nonactive tab for the run categories when processing retro entries in the pay calculation.	
Target Next Period When Current Period Replacement Payment is Complete	For workers with completed off-cycle replacement payments in the current period, targets retro differences in the next period.	

Option	Description	More Information
	Leave clear to process retro differences in the current period.	
Enable Retro Processing from Different Tax Authorities to On-Cycle Payroll	Forwards all retro differences to on-cycle payroll and calculates taxes based on your current period tax authorities. You can still forward retro differences to off-cycle payroll when you select this check box.	
Enable Taxes on Retro Amounts from Prior Tax Authorities	To enable this feature, you must also select Enable Retro Processing from Different Tax Authorities to On-Cycle Payroll . With both features enabled, Workday forwards all retro differences to on-cycle payroll and calculates taxes for the retro pay based on the tax authorities in effect for the retro period.	
Enable Negative Tax Withholding for Negative Wages on Payroll Result	When selected, and you process retro pay input and a negative wage results, Workday calculates the taxes to credit by multiplying the percentage of reversed year-to-date taxable wages against the actual year-to-date tax withheld.	

FLSA and Flat Sum Bonus (USA)

Option	Description	More Information
Disable FLSA Period Alignment for Flat Sum Bonus Coverage Date	When you input aggregated hours and don't align the hours with an FLSA workweek, Workday automatically aligns the hours with an FLSA workweek. We provide this check box for you to select if you don't want Workday to extend the coverage dates. When disabled, Workday picks up only the hours that are entirely within a workweek and ignores partial weeks. Note: To achieve compliance with California overtime law, you must either report daily hours with coverage dates or report aggregated hours with coverage	Concept: Overtime Payments for Flat Sum Bonuses (USA)

Option	Description	More Information
	dates that align with an FLSA workweek.	
Disable Company Tax Relationships for FLSA and Flat Sum Bonus	When you set up a Single Legal Entity or a Common Pay Master Company relationship, Workday automatically calculates FLSA overtime by aggregating the hours and wages worked by a shared worker between 2 or more companies. If you don't want Workday to automatically calculate FLSA across companies you can Disable Company Tax Relationships for FLSA. When you select the check box, Workday calculates the FLSA overtime independently for each company.	Setup Considerations: FLSA Company Relationships

Tax Elections / Taxes

Option	Description	More Information
Display National ID on Tax Elections (USA-Federal, State, Local, CAN-Federal, Province)	For security, Workday automatically masks workers' national ID numbers on all tax withholding elections. Select this check box to display national ID numbers for all workers.	
Enable Hours Worked for Employer SUI	When enabled: • Workday includes the hours worked at the *SUI (ER)[USA]* pay component level within the *Get Quarterly Worker Tax Filing Data* web service. • U.S. tax filing integrations output hours worked within their respective quarterly tax files for the *SUI (ER)[USA]* pay component. Before you enable this option, you must configure the *Reporting: SUI ER Hours Worked [USA]* pay component group.	Steps: Report Hours Worked for SUI
Enable Canadian Bonus Tax Calculation on Retro Pay Earnings	When enabled, retroactive payments (configured using the *Income Taxable (Withhold Taxes)* and *Quebec Taxable (Withhold*	

Option	Description	More Information
	Taxes) pay component groups) are treated as bonus taxable wages when the worker doesn't have an active TD1X configured or pay component groups with QC Commission earnings. Example: A worker receives a retroactive compensation increase. Their retroactive salary increase amount is taxed as bonus income when you select the check box and their pay meets the criteria. Workers who have a TD1X tax election or pay component groups with QC Commissions configured are taxed normally. This option is unchecked automatically. Select it to enable the feature.	

Withholding / Court Orders

Option	Description	More Information
ID Definition for Withholding Orders	Associates a withholding order sequence generator for the Withholding Order ID field on the Record US Withholding Order for Worker and the Record CAN Withholding Order for Worker tasks. Use the Create ID Definition/ Sequence Generator task to create the sequence generator.	dan1370796358261.dita
Allow Partial Fees	Select this check box to enable Workday to deduct partial fees when taking the entire fee would cause the deduction to exceed the maximum amount to withhold.	
Disable Monthly Limit on Electronic Withholding Orders	Workday automatically calculates the withholding order monthly limit for child support orders issued by the Office of Child Support Enforcement (OCSE) and recorded using the Process Electronic Income Withholding Order (e-IWO) task. Workday annualizes the order amount and then de-annualizes	Steps: Set Up Electronic Income Withholding Orders (USA)

Option	Description	More Information
	the amount based on pay period intervals. This can result in under-withholding for workers paid weekly or biweekly. To enable manual entries of monthly limits, select the Disable Automatic Calculation of Monthly Limit check box.	

Arrears

Option	Description	More Information
Enable Countries Where Workers View Arrears Balances	Select the country or countries where you want to enable employee self-service with arrears balancing. Only the countries where you've enabled payroll in Enabled Countries display for selection in this box. Only workers in pay groups in the selected countries can view their arrears balances on the Arrears tab, which displays on the worker profile, when configured, and in the Benefits and Pay Hub - Pay > Arrears section.	
Arrears Tooltip Text - Use Default	Displays the message provided by Workday when employees view their arrears balances.	
Arrears Tooltip Text - Override	Select to create your own tenanted message to employees when they view arrears balances.	

Payslips

Specify whether employees can print or view payslips from self-service pages when the *Self-Service: Payroll (My Payslips)* domain is enabled.

Option	Description	More Information
Disable Payslip Printing (Business Form)	Prevents display of the Print Payslip Image button and PDF version of the payslip. In Workday mobile apps, prevents display of the View PDF Statement button when displaying the mobile payslip details. Workday Payroll for France recommends that you disable payslip printing in self-service for all workers.	Steps: Set Up Payslip Printing Options

Option	Description	More Information
Disable Payslip Viewing (Online Version)	Prevents display of the View Payslip button and online version of the payslip. In Workday mobile apps, the YTD Gross and YTD Net amounts don't display in mobile payslip details. Workday Payroll for France recommends that you disable payslip viewing in self-service for all workers.	
Print Payslips Using Report Designer Layout in Self Service	Enables you to select a Report Designer layout for printing payslips from employee self-service tasks. Not required for XSLT custom payslips. Not applicable to Workday Payroll for France.	Steps: Set Up Custom Report Designer Payslips
Report Designer Layout	Sets the Report Designer layout for printing payslips from employee self-service tasks. When you don't select a layout, Workday automatically sets the tenant payslip layout to *Payslip (Report Design)*. You can override this setting with country-specific Report Designer layouts using the Maintain Payroll Payslip Configuration task. Not applicable to Workday Payroll for France.	Define Payslips
Enable for Self-Service	Enables the Print Multiple Payslips task for self-service, so a worker can print multiple payslips to a single PDF.	Print Multiple Payslips for a Worker
Enable for Administrator	Enables the Print Multiple Payslips task for administrators so you can print multiple payslips for a worker to a single PDF.	Print Multiple Payslips for a Worker
Following Pay Complete	Automatically saves absence balance values for payslips as of the end of the pay period, after Run Pay Complete. Selecting this check box can improve performance when viewing or printing payslips if you:	

Option	Description	More Information
	• Use Workday Absence to track absence balances. • Have a large population of workers. If you don't save absence balances, Workday has to recalculate them each time anyone displays or prints a payslip. Workday recommends that you monitor this process in the Process Monitor to ensure that it completes before you settle payroll.	
Only for Workers With Check Payments or Payslip Printing Enabled	Limits the Persist Absence Data for Payslips job to workers who: • Receive their pay by check. • Typically print their payslips. • Have been terminated. Selecting this check box can improve the performance of the job that saves absence balances after Run Pay Complete.	

Payroll Costing

Note: You can configure Payroll Costing options on the Maintain Payroll Accounting Options task. The options and your selections display on the Edit Tenant Setup - Payroll task but in a read-only format.

Option	Description	More Information
Enable Mid Period Costing	When you enable midperiod costing, Workday prorates labor costs according to the costing allocation begin and end dates using the proration rule defined on the pay component. Workday prorates costing allocation by the proration type on the pay component. Costing always prorate regardless of pay component proration. When you don't select midperiod costing, Workday applies the cost allocations according to the costing rules on the pay period end date regardless of midperiod changes.	Steps: Set Up Labor Costing

Option	Description	More Information
Enable Related Worktags	Enables you to configure allowed and required related worktag functionality for costing allocations.	Steps: Enable Worktags for Cost Allocations
Require Position	Makes the Position field required when allocating a worker's labor costs through the Assign Costing Allocation task or web service. When *Assign Costing Allocation* is a subprocess of the *Leave of Absence* business process, you can allocate costs for positions on leave, but not for workers on leave. Add step condition logic to the *Leave of Absence* business process to skip costing for worker-based leaves. Otherwise, worker-based leave requests stop the *Leave of Absence* business process and you need to cancel them.	Define Cost Allocations for a Worker
Disable Date Selection for Existing Allocations	Disables the From and To date fields for the Assign Costing Allocation task and business process. If you disable the date selection, you can't filter through your costing allocations and it might impact your performance if you have a large number of costing allocations.	Define Cost Allocations for a Worker
Display Costing Allocation Event Number	Assigns a unique ID number to completed costing allocation events and displays this number in various reports. Retroactively assigns ID numbers to past costing allocation events with a completed status.	Steps: Set Up Labor Costing
Employer Paid Expense Default Costing - Exclude Negative Result Lines	Enables you to exclude negative earnings while calculating your employer-paid default costing. It ensures that you don't have highly inflated employer-paid expense costing distributions.	Concept: Default Allocation of Employer-Paid Expenses
Disable Forward Accrual Costing to Worker Defaults when Employer Paid Statutory Taxes Over Allocate	When forward accrual calculations include inflated employer-paid statutory taxes due to negative earnings on the payroll result and:	Concept: Forward Accruals Costing for Employer-Paid Statutory Taxes

Option	Description	More Information
	• You select the check box, Workday costs all employer-paid statutory taxes based upon the earning proration. • You don't select the check box, Workday continues to cost all employer paid statutory taxes 100% to worker defaults.	

Payroll Accounting

Note: You can configure Payroll Accounting options on the Maintain Payroll Accounting Options task. The options and your selections display on the Edit Tenant Setup - Payroll task but in a read-only format.

Option	Description	More Information
Off-Cycle - Use Payment Date as Accounting Date	Sets the payment date as the accounting date in journal lines for off-cycle payments. By default, Workday uses the period end date. The accounting date determines which ledger period to post the journal lines to. If this date falls within an open ledger period, Workday posts the journal lines to this period. If the ledger period is closed, Workday posts the journal lines to the next open ledger period.	Steps: Set Up Payroll Accounting
Account Posting Rules - Use Primary Position Attributes when Evaluating	Uses the primary position attributes of a worker (Position Worker Type, Pay Rate Type, Position Time Type, Job Profile, Job Classification, Job Category, and Job Family) while evaluating these account posting rules: • Payroll Deduction • Payroll Expenses • Payroll Earnings	
Intercompany Accounting - Enable	Enables you to charge payroll expenses between multiple companies within an organization.	Setup Considerations: Payroll Intercompany Accounting
Adjustments - Enable Payroll Result Type to Default to On-Cycle and Off-Cycle	Configures both on-cycle and off-cycle as the default payroll result type on the Create Payroll Accounting Adjustments task.	Create Payroll Accounting Adjustments

Option	Description	More Information
Budget Date - Use Period Schedule Payroll Payment Date	Sets the transaction budget date as the pay period payment date from the Period Schedule when processing on-cycle payments. For off-cycle on-demand payments, Workday uses the payment date related to the process. By default, Workday uses the pay period end date from the period schedule.	Steps: Set Up Payroll Accounting
Grants - Enable Alternate Costing for Begin / End Dates	Use for awards and grants that you set up in Workday Financials to indicate how to manage grants with begin or end dates within a processing pay period. When selected, Workday prorates the grant journal lines and substitutes costing to the grant with the worker's default organizational assignment. The grant worktag persists on the journal lines with the worker's default organizational assignments. For grants that have more than 1 begin or end set of dates within the pay period, Workday respects only the first set of dates	Steps: Set Up Grants
Grants - Use Position Restriction Costing Override for Begin / End Date	Use for awards and grants that you set up in Workday Financials to indicate how to manage grants with begin or end dates within a processing pay period. When selected, Workday prorates the grant journal lines and substitutes costing to the grant with the position restriction costing allocation if one exists. If none exists, Workday uses the worker's organization default assignments. To select this check box, you must also select Enable Alternative Costing for Grant Begin and End Dates for Awards. If you disable Enable Alternative Costing for Grant Begin and End Dates for Awards, then Workday	Steps: Set Up Grants

Option	Description	More Information
	automatically disables this check box.	
Effort Certification - Enable View Attachments	Enables you to view attachments that are added with the initial creation of the *Effort Certification* business process. After you select the check box, Workday displays the effort certification attachments while reviewing the *Create Payroll Accounting Adjustment for Effort Certification* business process from your inbox.	Setup Considerations: Payroll Accounting Adjustments
Salary Over the Cap - Enable	Enables salary over the cap feature for payroll accounting. The Salary Over Cap suballocation grid provides costing based on worker defaults. You can edit this costing as needed. This feature is available when you've either: • Workday Payroll only. • Workday Payroll with Grants Management.	Steps: Set Up Labor Costing
Salary Over the Cap - Allow Grant Worktag in Suballocations	Enables you to allocate the over the cap portion of a worker's salary to grant worktags other than their parent grant.	../../../payroll/payroll-for-the-us/salary-over-the-cap/allocate-over-the-cap-salary-costs-to-additional-grants.dita
Salary Over the Cap - Use Academic Pay Annual Work Periods	Calculates the salary over-the-cap amount for a pay period using the number of work periods in the academic year. Select this check box, when you use specialized configurations of academic pay using both an: • Earning for the annual work period. • Offset earning for the accrual payment.	
Salary Over the Cap - Use Costing Overrides when Earning isn't in the Pay Component Group	Enables you to allocate earnings not configured in a Salary Over the Cap pay component group to under the cap override worktags you've configured.	Set Up Cost Allocations for Earnings
Salary Over the Cap - Evaluate 0% FTE as 100%	Evaluates a worker's scheduled weekly hours of 0 or 0% FTE as 100% to include their earnings	

Option	Description	More Information
	in the Salary Over the Cap calculation.	
Allocate Net Pay Liability based on earning proration	Enables you to allocate net pay liability, creating journal lines that align with the distribution of earnings paid to the worker.	
Allocate Net Pay Liability - Exclude Negative Result Lines	Enables you to exclude negative earnings when calculating the earnings-based proration for net pay liability allocation, preventing inflated distributions or miscalculations.	

Payroll Commitments

Note: You can configure Payroll Commitments options on the Maintain Payroll Accounting Options task. The options and your selections display on the Edit Tenant Setup - Payroll task but in a read-only format.

Option	Description	More Information
Enable Salary Over the Cap	Calculates costing and standard salary cap proration for payroll commitment transactions: • Initial Commitments • Commitment Adjustments • Liquidations	Steps: Set Up Labor Costing Steps: Process Payroll Commitment Accounting
Use Earning Frequency Override	Enables initial commitments and adjustments processes to respect the override frequency on an earning so they align with payroll actuals on a different scheduled pay period frequency. Applies if the earning has an override frequency, the frequency differs from the worker pay period frequency, and is the same frequency type. Doesn't apply to academic pay or period activity pay.	Steps: Set Up Payroll Accounting
Enable Journal Details	Displays commitments in your finance journals in a detailed (nonaggregated) form so you have easier access to detailed commitments data for review and update as needed. By default, Workday displays commitments in the ledger as summarized (aggregated) yearly journal data.	Create Initial Payroll Commitments

Option	Description	More Information
Include Payroll Forward Accruals for Budgetary Control	Enables you to add forward accruals to your budget, to improve budget accuracy.	Configure Payroll Commitment Options
Include Fringe Basis on Fringe Benefit Expense	When calculating fringe expenses, enables you to: • Split fringe benefit journal lines by pay component. • Add the new Fringe Basis worktag on the fringe benefit journal lines. Note: This feature doesn't impact already liquidated periods for commitments and obligations, and completed journal lines for payroll actuals.	Concept: Fringe Basis Worktag
Enable Forward Accruals for Payroll Fringe Benefit Expense	Enables you to create forward accruals and reversals for fringe benefit expense.	Steps: Create Forward Accruals for Fringe Benefit Expense
Allocate Net Pay Liability based on earning proration	Enables Net Pay Liability Allocation to create multiple actuals journal lines consistent with the distribution of the earnings paid to the worker.	
Allocate Net Pay Liability - Exclude Negative Result Lines	Enables you to exclude negative earnings when calculating the earnings-based proration for Net Pay Liability Allocation, preventing inflated distributions or miscalculations.	

ROE (CAN)

Option	Description	More Information
Select Submit by default on Approve ROE task	Select this check box to select the check box to submit an approved ROE automatically.	
Preserve ROE period and separation payment overrides when re-creating ROE (default option)	Select to enable the Preserve ROE period and separation payment overrides check box automatically on ROEs when you enter overrides for period and separation payments.	
View linked or multiple ROEs for a worker in list view	When you select the check box and view a worker's ROE or ROEs, Workday displays: • A list view of multiple ROEs for a worker in multiple jobs.	

Option	Description	More Information
	• Linked ROEs (example: Original and Amend) for workers in one position.	

Year End

Option	Description	More Information
Form Alignment Override Top	Sets the distance in millimeters between the top margin of the W-2 and W-2C forms and the start of the topmost quadrant boxes. If necessary, override the default alignment of W-2 and W-2C form stock.	Generate and Print Year-End Tax Forms (USA) Generate and Print Year-End Tax Correction Forms (USA)
Form Alignment Override Left	Sets the distance in millimeters between the left margin of the W-2 and W-2C forms and the start of the leftmost quadrant boxes. If necessary, override the default alignment of W-2 and W-2C form stock.	
Electronic Signature Text - Use Default	Displays the message provided by Workday when employees change their elections for receiving printed W-2s and W-2Cs. Applicable only when you enable employees to opt out, using the Company Payroll Printing Options task. Clear the check box to enter and display a custom message.	Set Up Year-End Tax Document Printing Options for Workers
Electronic Signature Text - Override	The message employees see when they change their year-end tax document printing election.	
Output File - Maximum number of W-2s in each PDF	Each PDF that Workday creates displays the selected number of W-2s.	
Electronic Signature Text for T4, T4A, and RL-1 - Use Default Electronic Signature Text for T4A-RCA, RL-2 and NR4 Forms - Use Default	Displays the message provided by Workday when employees change their elections for receiving printed year-end tax documents. Applicable only when you enable employees to change	Set Up Year-End Tax Document Printing Options for Workers

Option	Description	More Information
	their elections, using the Company Payroll Printing Options task. Clear the check box to enter and display a custom message.	
Electronic Signature Text for T4, T4A, and RL-1 - Override Electronic Signature Text for T4A-RCA, RL-2 and NR4 Forms - Override	The message employees see when they change their year-end tax document printing election.	

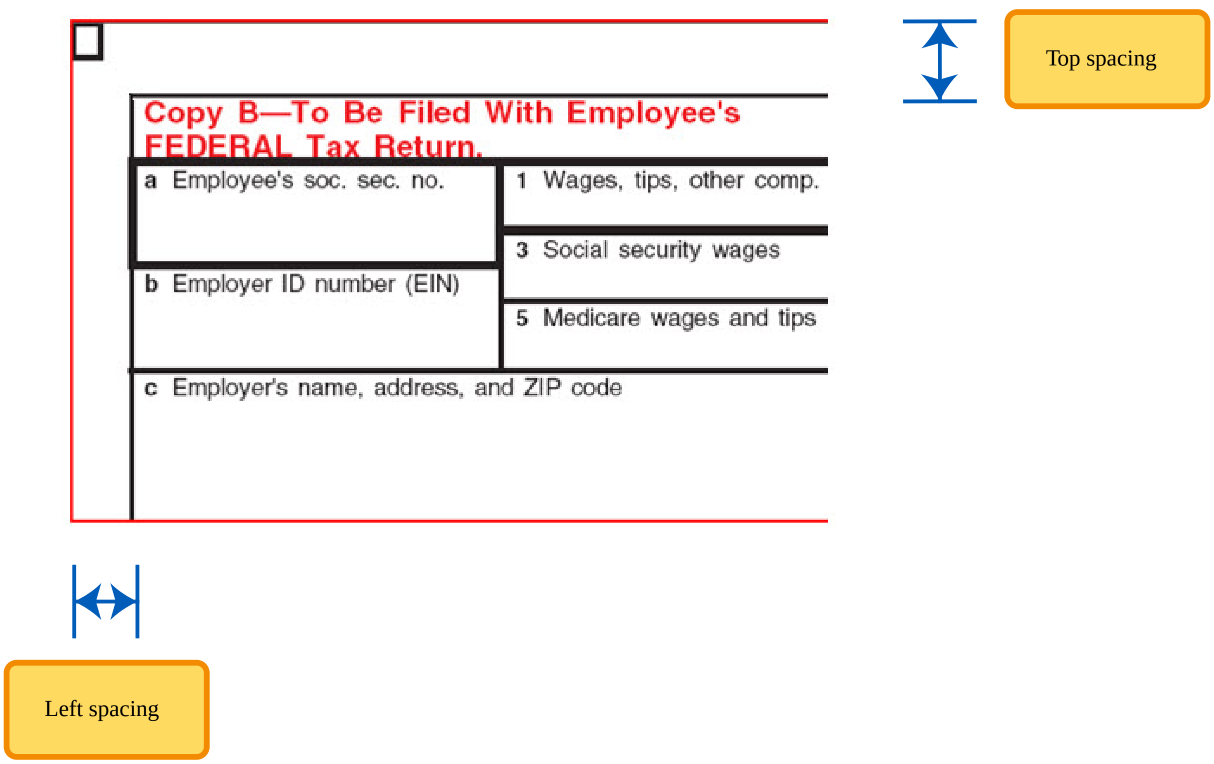

Figure 1: W-2 Form Margin Alignment Override

Payroll Administrator Results

Option	Description	More Information
Disable Payroll Result Profile	Workday disables the Export to Excel and View Related Information functions, accessible as icons on the top right of most reports, to improve performance of the *View Payroll Results* report. Disabling these functions on this report enables data to load more rapidly. Select this check box if you want to use these functions.	View Payroll Results
Disable Pay Worklet	Select to hide the Pay worklet from workers. If selected, workers can't access their pay information using the Pay worklet either on desktop or mobile. Workers can access their pay information in the Benefits and Pay Hub. The checkbox is cleared by default.	Reference: Benefits and Pay Hub

Data Entry Check Options

Option	Description	More Information
Switch on Data Entry Check everywhere	Enables you to receive data entry check messages from all areas of Payroll that are enabled for the feature.	2025R1 Feature Release Note: Data Entry Checking and Payroll Input
Select areas to switch on Data Entry Check	Enables you to choose which areas to receive messages if you turn off messaging for data entry check everywhere in Payroll.	

Related Information

Reference

2023R1 What's New Post: Retroactive Payroll and Bonus Tax Calculation

Reference: Edit Tenant Setup - Recruiting

Manage tenant-wide settings for Workday Recruiting.

Option	Description	More Information
Enable Recruiting Job Areas	Enables the person referring a candidate to select a job area, in addition to a job requisition. Job areas are the same as job families.	Steps: Set Up Referrals

Option	Description	More Information
Hide Referral Ranking on My Referral Activity	Enables you to hide workers' referral ranking on the My Referral Activity dashboard.	Steps: Set Up Referrals
Enable Recruiting Referral Levels	Enables the person referring a prospect to select a referral relationship to indicate how they know the prospect.	Steps: Set Up Referrals
Referral Ownership Level	Enables you to select whether a referring worker owns the: • Candidate referral. • Job application they referred the candidate to.	Steps: Set Up Referrals
Referral Ownership Period (Months)	Sets a referral ownership period between 1 - 99 months. This field only displays if you select one of these options on the Referral Ownership Level setting: • Candidate Level • Job Application Level	Steps: Set Up Referrals
Duplicate Referrals Policy	Prevents potential duplicate employee referrals. If you select any of these options, Workday displays an Enable Exact Match for Duplicate Referrals check box: • Prevent referral if candidate already applied for the job requisition • Prevent referral if there's a potential duplicate prospect for the same job requisition or area • Prevent referral if this person already exists for any job requisition or area • Prevent referral if the candidate has a duplicate referral with an active owner	Concept: Manual Candidate Merging and Linking Concept: Automatic Candidate Merging
Enable Exact Match for Duplicate Referrals	This check box restricts potential duplicate referrals to candidates whose first and last names are an exact match. In addition, at least one of these fields must be an exact match: • Email address. • Phone.	

Option	Description	More Information
	• A social network username or URL. Workday doesn't display this check box when you opt in to the Duplicate Management Framework, configure Candidate Level referral ownership, and select a duplicate referrals policy. The Duplicate Management Framework identifies duplicates based on your configured referrals policy and match rules.	
Duplicate Referrals Message	Enables you to enter a message that a worker making a referral sees when Workday detects a duplicate. The message displays based on the Duplicate Referrals Policy selected.	Concept: Manual Candidate Merging and Linking Concept: Automatic Candidate Merging
Enable Automatic Candidate Merging	Automatically merges duplicate candidates when: • Candidates apply to a job posting on an external career site. • You use the *Put Candidate* web service to upload candidate information.	Concept: Automatic Candidate Merging
Recruiter Overload Count	Sets a limit for job requisition assignments for primary recruiters. Workday displays an alert on the Manage Recruiter Workload report when a recruiter exceeds this limit.	
Enable Interview Scheduling Calendar Integration	Enables you to integrate with 1 of these options when scheduling interviews: • Microsoft Outlook. • Google Calendar.	Steps: Set Up Interviews
Location Types for Interview Scheduling	Enables you to select the organization-related location type for an interview when you don't integrate with 1 of these options: • Microsoft Outlook. • Google Calendar.	Steps: Set Up Interviews
Web Conference Integration System	Enables you to select a Workday Studio integration to	Steps: Set Up Integration to Web Conference Provider

Option	Description	More Information
	add web conference links to interview schedules.	
Candidate Home Account Intro Message	This text displays on the Candidate Home account creation form. You can't report on this field in custom reports. Workday recommends that you place any legal text that you'll need to report on for auditing reasons in the Terms and Conditions field.	
Require Candidate Home Account	Requires a candidate to create an account before they can submit a job application from an external career site. Otherwise, candidates have the option of creating one. If you select this check box, Workday populates these fields: • Account Creation Consent Message • Candidate Consent	Steps: Set Up Recruiting Concept: User Accounts for External Sites
Account Creation Consent Message	Workday enables this field if you select the Require Candidate Home Account check box. If you enter text, Workday adds a check box for candidates to acknowledge that they agree to the terms and conditions.	Steps: Set Up Notifications for Candidate Home Tasks Concept: User Accounts for External Sites
Candidate Consent	Workday enables this field if you select the Require Candidate Home Account check box. If you enter text in this field, Workday displays this message to candidates to acknowledge when they create an account.	
Enable Candidate Verification Email	Requires that candidates who create an account verify their account through an email.	Steps: Set Up Recruiting Concept: User Accounts for External Sites
Candidate Social Sign-In Providers	Select the providers you want to enable candidates to sign into their external career site accounts. Selecting a provider activates the Candidate Social Sign-In Consent Message field. Apple and Google are the active providers at this time.	
Candidate Social Sign-In Consent Message	This rich text field appears when you select at least one provider	

Option	Description	More Information
	from the Candidate Social Sign-In Providers field. Enter a message for external candidates using their social accounts to sign into the External Career site. Add helpful text and links to improve the account sign in experience for external candidates.	
Enable Candidate School Look Up for External Career Sites	Enables external candidates completing job applications to search for and select schools that exist in your tenant. You can maintain your tenant's list of schools using the Maintain Schools report. Workday recommends that you review your list of schools before you make it available to an external audience. If you enable this feature, external candidates won't be able to add a school if it isn't in your tenant. You can create an option for candidates to select when their school isn't in your tenant but they still need to submit their education details. Workday recommends that you: • Use the Create School task to create a school with a name such as *School Unavailable*. • Include instructional text on the job application that mentions this option to candidates.	Steps: Set Up Education
Hide End Date and Time Left to Apply on Job Postings	Enables you to opt out of showing Job Posting End Date and Time Left to Apply on Job Postings.	Concept: Job Posting End Date and Time Left to Apply
Enable Candidate Fields in Notifications	Enables Workday to create a notification system account for all candidates that enables them to view notifications properly with dynamic fields.	Steps: Configure Access to Fields in Candidate Notifications
Reapply to Job Requisition	You can enable whether or not candidates can reapply from Candidate Home to an evergreen or job requisition.	

Option	Description	More Information
Enable Alternate External Career Site URL	Enables you to add an additional external career site URL.	
Days of Open Candidate Conversation After Move to Hire	Enables you to enter the duration to keep candidate conversations open after Move to Hire. If no duration is set, Workday closes candidate conversations at the end of the day in the Job Requisition's time zone on Move to Hire or after 180 days if there is no Move to Hire.	../../../../../../Writer--In-Work--Folder/John-Mugumya-In-Work/steps--send-sms-to-candidates.dita
Days of Open Candidate Conversation After Disposition	Enables you to enter the duration to keep candidate conversations open after Disposition. If no duration is set, Workday closes candidate conversations at the end of the day in the Job Requisition's time zone on Disposition or after 180 days if there is no Disposition.	
Copy Personal Information from Job Application on Initiate Hire	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. This is the personal information that Workday copies from the candidate job application: • Date and place of birth. • Disability information. • Ethnicity. • Gender identity and preferred pronoun. • Marital status and date. • Military service. • Nationality and citizenship. • Religion.	Merge or Link Duplicate Candidates Setup Considerations: Duplicate Candidate Merging

Option	Description	More Information
	• Sexual orientation. • Social benefits locality.	
Copy Personal Information when Copying Job Applications	When copying the job application of a candidate to another job requisition, Workday also copies this personal information: • Date and place of birth. • Disability information. • Ethnicity, including whether they identify as Hispanic or Latino. • Military service and veteran status. • Nationality and citizenship. • Religion. • Sexual orientation and gender identity.	Take Action on Multiple Candidates
Collect Preferred Name	If you select this field, Workday enables you to collect both a preferred and a legal name for your candidates and prospects.	
Privacy Policy Link URL	Enter a URL using 1 of these formats: • http:// • https:// You can only configure 1 Privacy Policy Link URL for all external career sites.	Workday 32 What's New Post: External Career Site Privacy Policy
Privacy Policy Link Text	Enter up to 100 characters. You can translate Privacy Policy Link Text using the Translations business object.	
Candidate Skills Match Location Exclusion	Select which business site locations you want to exclude from Candidate Skills Match. Workday won't score candidate applications of job requisitions with a primary or additional location that you exclude.	Steps: Set Up Candidate Skills Match Concept: Candidate Skills Match
Candidate Skills Match Location Hierarchy Exclusion	Select which location hierarchies to exclude from Candidate Skills Match. Workday won't score candidate applications of job requisitions with a primary or additional	Steps: Set Up Candidate Skills Match Concept: Candidate Skills Match

Option	Description	More Information
	location within an excluded location hierarchy.	
Configure LinkedIn Integrations	You can enable Apply with LinkedIn and LinkedIn Recruiter System Connect.	Steps: Set Up LinkedIn Recruiter System Connect
Time to Fill	Defines the Start and End Time for Average Time Calculation 1 - 4 calculations. Average Time Calculation 1 used in the standard Time to Fill report. You can create a copy of the report and use the other Average Time Calculations in that version of the report.	Configure the Time to Fill Report
Job Application Stage Order	Define the order that you want the recruiting stages to display in Workday.	Steps: Set Up Recruiting Hub

Reference: Edit Tenant Setup - Reporting and Analytics

Manage tenant-wide settings for Workday reporting and analytics in these areas:

- Report Run History on page 142
- Worker Trending on page 142
- Scorecarding on page 143
- Mobile on page 143
- Prism Analytics on page 143
- Dashboard Run History on page 143

Report Run History

Option	Description	More Information
Enable Access to Report Run History	Captures report run history data for your organization. Use this data with the Workday-delivered Report Run History report or your own custom reports.	Reference: Report Run History

Worker Trending

Option	Description	More Information
Enable Worker Trending	Collects trended worker data. Select this option to use trended worker data in trending reports.	Concept: Trending Reports

Scorecarding

Option	Description	More Information
Enable Scorecarding	Enables the use of scorecards.	Concept: Workday Scorecards

Mobile

Option	Description	More Information
Disable Email Annotations	Disables the annotate and email reports feature on Workday for iPad.	

Prism Analytics

Option	Description	More Information
Enable Prism Dataset View History	Captures dataset view history data in the audit log. Use this data with the Workday-delivered Dataset View History report.	
Enable Prism Dataset View Transformations	Enables users with Dataset Viewer permission to view dataset transformations. Workday recommends that you don't select this check box if you share a dataset that contains potentially sensitive data.	

Dashboard Run History

Option	Description	More Information
Enable Access to Dashboard Run History	Captures dashboard run history data for your organization.	Steps: Set Up Custom Dashboards

Reference: Edit Tenant Setup - Search

Manage your tenant's search category and synonyms:

Option	Description
Search Category	Select a search category for your tenant. Common is the default. You can access the Change Preferences task to select All of Workday as your Preferred Search Category.
Search Synonyms	For each Workday Term, specify 1 or more Custom Terms or synonyms using the tenant base language. Doing so to makes it easier to find Workday tasks and standard reports. Separate multiple synonyms using commas. Example: *PTO*, *vacation*, *holiday*. You can list synonyms in different languages. To do so: • Define them in the tenant base language.

Option	Description
	• Use the Translate Business Object report to create translations in other languages. A search for a synonym in any language returns the Workday task or standard report in your preferred language. Example: You can define synonyms such as *Vacation* or *PTO* for the Workday term *Time Off*. When you search for the terms *Vacation* or *PTO*, Workday tasks and standard reports with *Time Off* in the title display in the search results.

Reference: Edit Tenant Setup - Security

Manage tenant-wide security and authentication settings in these areas:

- Security Email Settings on page 144
- WebAuthn (FIDO2) on page 148
- Single Sign-On on page 148
- OAuth 2.0 Settings on page 150
- SAML Setup on page 151
- OpenID Connect Settings on page 157
- Mobile Authentication on page 157
- Sensitive Data Enumeration on page 158
- Trusted Devices on page 159
- Multifactor Authentication Settings on page 159

Security Email Settings

Option	Description	More Information
Enable Security Emails	Required for sending: • Password reset emails. • Trusted device emails. • X.509 and PGP certificate expiration notifications. Enables the task Workday Account > Manage Password Challenge Questions (Do Not Use) on the related actions menu of each worker. Note: Workday plans to retire challenge questions in a future release. If checked: • Send to work email only: All Workday-generated emails go only to the work email address listed in each account. • Send to work email, else home email: If the worker has no work email address on file, Workday	Concept: X.509 Certificates in Workday Concept: PGP Certificates in Workday

Option	Description	More Information
	sends the email to the home email address. • Send to home email, else work email: If the worker has no home email address on file, Workday sends the email to the work email address. If unchecked: • Users can only reset their password online. • Workday won't notify you about expired X.509 and PGP certificates for your tenant. Such expired certificates can prevent successful sign-ins to Workday. Password reset emails initiate when: • Users reset their passwords. Workday emails a one-time reset link. • You initiate a password reset using a business process. Workday emails a temporary password. • You initiate a password reset using the Generate Random Password option on the Edit Workday Accounts task. Workday emails a temporary password, except when you set and verify a new password.	
Bypass Login Redirect for New Accounts	Includes a URL in new Workday account emails that enables users to: • Sign in to Workday using their username and password. • Not be redirected to your SSO Login Redirect URL. Example: Enable recruiting agency users with new Workday accounts to sign in to Workday for the first time using their username and password.	

Option	Description	More Information
	Workday sends the new Workday account emails with the login redirect URL to new hires and rehires.	
Email Temporary Password to New Accounts	Generates temporary passwords automatically and emails the password to the new worker instead of requiring new workers to get their temporary password from their Workday administrator.	
Enable Forgotten Password Reset	Enables users to reset their password through the Forgot Password link on the sign-in to Workday page. The Disable All Emails restriction on the Edit Tenant Setup - Notifications task overrides this option and suppresses the Forgot Password link. If checked: • Reset Password Online requires users to answer 3 challenge questions before entering a new password and signing in to Workday. Note: Workday plans to retire challenge questions in a future release. • One Time Use Link requires users to enter their username and work or home email address. Workday emails a single-use link that they click to reset their password online. Workday must include the email address they enter in the contact information of their profile in Workday. The address is subject to the Enable Security Emails setting. Example: Users must enter their work email address if you've selected Send to work email only under Enable Security Emails.	Configure Password Reset

Option	Description	More Information
Enable Change Password Link	Displays a link to the Change Password task on the Workday sign-in page.	Configure Password Reset
Enable Email Notification On Account Lockout	Sends a notification to the primary email address of the user the next time they try to sign in after Workday locks their account: • If an administrator locks the account manually, the email instructs the user to contact an administrator. Workday sends a notification on subsequent sign-in attempts every 30 minutes if the account remains locked. Example: An administrator manually locks a user out at 9:00 AM. When the user tries to sign in at 9:01 AM, Workday sends an email. If the account for the user remains locked, and they try to sign in again at: ◦ 9:15 AM, Workday doesn't send an email. ◦ 9:20 AM, Workday doesn't send an email. ◦ 9:31 AM, Workday sends another email. • If Workday locks the account due to excessive failed sign-in attempts, the email instructs the user to sign in later. You can specify when users can sign in again on the Maintain Password Rules task. Example: A user exceeds the maximum unsuccessful sign-in attempts and Workday locks their account at 9:00 AM. When they try to sign in again at 9:01	

Option	Description	More Information
	AM, Workday sends an email about a 10-minute lockout period. If the user has another unsuccessful sign-in attempt at 9:11 AM, Workday sends another email. If the user signs in successfully at 9:11 AM, Workday doesn't send another email. Select the Enable Security Emails check box for users to receive these notifications.	

WebAuthn (FIDO2)

Option	Description	More Information
Enable Web Authentication	Enables you to specify web authentication as an allowed authentication type on authentication policies. With web authentication enabled, your users can enroll in and use web authentication for passwordless sign in to Workday on supported web browsers.	

Single Sign-On

Option	Description	More Information
Default Delegated Authentication System (Do Not Use)	Requires workers to sign in with usernames and passwords stored in an external identity management system. You can use the Edit Workday Account task to set an alternative delegated authentication system for individual Workday accounts. You can use this option simultaneously with a Security Assertion Markup Language (SAML) system. Note: Workday plans to retire delegated authentication in a future release. We recommend that you use other forms of authentication that we support.	Enable Delegated Authentication
Delegated Authentication Timeout (Do Not Use)	Specifies the number of seconds before Workday stops	Enable Delegated Authentication

Option	Description	More Information
	trying to use the selected delegated authentication system, due to a slow response from the delegated authentication web service. Note: Workday plans to retire delegated authentication in a future release. We recommend that you use other forms of authentication that we support.	

Redirection URLs	Alternate URLs that Workday references when a specific action occurs. Redirect URLs must use HTTPS.
	
	• Redirect Type determines if Workday redirects all users to:
	  ◦ The single set of sign-in redirect URLs specified on this task for sign-in (Single URL).
	  ◦ The sign-in redirect URLs on the selected Authentication Selector for sign-in, rather than URLs specified on this task (Authentication Selector).
	• (Applies to desktop only) Login Redirect URL is an alternative URL to reference when workers make unauthenticated sign-in requests. Workday uses this URL instead of the Workday sign-in page or email links that reference Workday-authenticated URLs.
	• (Applies to desktop and mobile) Logout Redirect URL is an alternative URL to reference when workers exit Workday using the Sign Out link for the selected Environment.
	• (Applies to desktop and mobile) Timeout Redirect URL is an alternative URL
		Set Up Authentication Selectors

Option	Description	More Information
	to reference when the Workday session of a worker times out for the selected Environment. • (Applies to mobile only) Mobile App Login Redirect URL is an alternative URL to reference when a worker attempts to sign in to Workday on Android, iPad, or iPhone for the selected Environment. • (Applies to mobile only) Mobile Browser Login Redirect URL is an alternative URL to reference when a worker attempts to sign in to Workday on a mobile browser for the selected Environment. • Preview Only applies the redirect URLs to Preview tenants only. You can't select Preview Only if you select the Production environment. You can select up to 2 redirect URLs for each environment. If you do, you must mark 1 as Preview Only; Workday will use the URL marked as Preview Only in Preview tenants, and the other in Production tenants. Note: To apply the redirection URLs to your Sandbox Preview or Implementation Preview tenants, select *Sandbox* or *Implementation* respectively at the Environment prompt. Those environments also apply to the respective preview tenants.	

OAuth 2.0 Settings

Option	Description	More Information
OAuth 2.0 Clients Enabled	Enables OAuth 2.0 clients to access the Workday API for your tenant.	Register API Clients

SAML Setup

To enable:

- SAML for your tenant, select the Enable SAML Authentication check box.
- Workday-delivered multifactor authentication for SAML on authentication policies, select the Enable Native Multi-Factor Authentication check box.

You can use SAML authentication and delegated authentication concurrently.

Configure options for *each* SAML IdP for your tenant.

Option	Description	More Information
Disabled	You can disable an IdP if it's currently assigned to an authentication policy. You can't disable an IdP if it's in use.	
Identity Provider Name	Unique human-readable name for the SAML IdP.	Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication
Issuer	Unique identifier for the SAML IdP. Workday validates a SAML authentication attempt only if: • The Issuer in the incoming SAML message is 1 of these configured Issuer values. • The environment type of the tenant is 1 of the valid environment types for the SAML IdP.	Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication
x509 Certificate	X.509 public certificate to verify the signature on SAML sign-in and sign-out requests.	Create an X.509 Public Key
Enable IdP Initiated Logout	Workday: 1. Accepts SAML sign-out requests from an external IdP. 2. Signs a worker out of a Workday session. 3. Sends a SAML sign-out response to your IdP.	Configure SAML Single Logout
Logout Response URL	URL to which Workday sends a successful sign-out response when the IdP initiates the sign-out.	Configure SAML Single Logout
Enable Workday Initiated Logout	Workday: 1. Generates signed SAML sign-out requests. 2. Sends them to your IdP.	Configure SAML Single Logout

Option	Description	More Information
	3. Redirects the SAML sign-out response message.	
Logout Request URL	URL to which Workday sends a sign-out request when it initiates the sign-out.	Configure SAML Single Logout
Use Unspecified Name ID Format for Logout Request	Workday generates a SAML logout request with an unspecified Name ID format, rather than X509SubjectName.	
SP Initiated	Workday uses this IdP for SP-initiated SAML authentication in the selected environment.	Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication
Service Provider ID	The Service Provider (SP) ID configured for the Workday tenant in the SAML IdP setup. It identifies Workday as the service provider in SAML messages sent to this IdP.	Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication Configure SAML Single Logout
Sign SP-initiated Request	Workday signs the SAML requests it sends to the SAML IdP using your SAML public key.	Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication
Do Not Deflate SP-initiated Request	Disables deflate compression of SAML requests that Workday sends to a SAML IdP endpoint. Workday automatically uses deflate compression and Base64 encoding when sending SAML requests. Certain SAML IdPs can't parse the SAML request if Workday compresses the SAML request with deflate.	Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication
Always Require IdP Authentication	(For SP-initiated SAML authentication) Requires the SAML IdP to force users to reauthenticate, even if they have an existing IdP session. Select *ForceAuthn and RequestedAuthnContext* if the IdP expects both of these values to force users to reauthenticate.	Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication
IdP SSO Service URL	(SP Initiated selected) - The URL to which Workday sends SAML authentication requests during SP-initiated SAML authentication. Complete this field for any IdP that Workday will use for SP-initiated SAML authentication.	Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication

Option	Description	More Information
	(SP Initiated cleared) - The URL to which Workday sends SAML authentication requests.	
Managed Device Attribute	The IdP returns an attribute as part of the SAML assertion when it's configured to use a mobile device management (MDM) provider to determine managed device status. The value you enter in this field must exactly match that attribute name. Example: If the IdP returns isWDManagedDev as the managed device attribute in SAML assertions, you must enter *isWDManagedDev* in this field.	Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication
Used for Environments	If you don't select an environment, Workday uses the same IdP for all environments. Note: To configure the IdP for use in your Sandbox Preview or Implementation Preview tenants, select *Sandbox* or *Implementation* respectively at the Used for Environments prompt. Those environments also apply to the respective preview tenants.	
Preview Only	Enables the SAML IdP for Preview tenants for the selected environments only. If the selected environment is Production, you can't select Preview Only. • If you don't select Preview Only for any IdP in an environment, Workday uses all IdPs for that environment. • If you select Preview Only for 1 or more IdPs in an environment, Workday uses them for Preview tenants in that environment. Workday uses the IdPs for which the Preview Only check box isn't selected for Production tenants in that environment.	

Configure options for *all* SAML IdPs for your tenant.

Option	Description	More Information
x509 Private Key Pair	X.509 private key pair to use with SAML IdP-initiated sign-outs and Workday-initiated sign-outs. With SAML IdP-initiated sign-outs, Workday uses the X.509 private key pair to sign the SAML sign-out response. With Workday-initiated sign-outs, Workday uses the X.509 private key pair to sign the SAML sign-out request.	Create an X.509 Private Key Pair
Enable Mobile Browser SSO for Native Apps	Redirects users to a mobile browser to complete Single Sign-On (SSO) when they sign in to Workday on Android, iPad, and iPhone. After successful sign-in, Workday redirect users to the Workday app on their device. You can't enable this feature if you've enabled certificate-based SSO. If you enable this feature: • You can't enable dynamic or standard certificate pinning. • When users sign out of their mobile application, Workday doesn't terminate the SSO session. To enable hardware authentication such as YubiKey on mobile devices, you must select this option.	Enable Single Sign-On (SSO) for Mobile on page 197
Enable Microsoft Edge for Login to Native Mobile Apps	Redirects users to the Microsoft Edge web browser to complete Single Sign-On (SSO) when they sign in to Workday on Android, iPad, and iPhone. After successful sign-in, Workday redirect users to the Workday app on their device.	Enable Single Sign-On (SSO) for Mobile on page 197
Enable DOM Storage	Enables DOM (Document Object Model) storage for Single Sign-On (SSO) configurations that were configured to use DOM storage to work correctly. Depending on the configuration,	Enable Single Sign-On (SSO) for Mobile on page 197

Option	Description	More Information
	DOM storage can optimize load times through client-side storage.	
Enable Certificate Based SSO	Enables certificate-based SSO for Workday on Android, iPad, and iPhone.	Enable Single Sign-On (SSO) for Mobile on page 197
Enable Dynamic Certificate Pinning	(For Workday on Android, iPad, and iPhone) Ensures authentication requests from mobile clients to your SSO providers are made only through hosts associated with the Trusted Domain Certificates. Dynamic certificate pinning is only available for Workday on Android if you also enable certificate-based SSO.	Enable Single Sign-On (SSO) for Mobile on page 197
Trusted Domain Certificates	The trusted domain certificates that you store in Workday for dynamic certificate pinning. When Workday attempts to connect to an SSO provider from the mobile client, it checks the trusted domain certificate that you've stored for the SSO provider domain against the certificate presented by the SSO provider host. Workday enables the connection only if the certificates match. Note: The Workday mobile client permits domain names for which Workday doesn't have a trusted domain certificate.	Enable Single Sign-On (SSO) for Mobile on page 197
Service Provider ID (Will be deprecated)	Workday plans to retire this field. Use the Service Provider ID field in the SAML Identity Providers grid instead.	Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication
Enable SP Initiated SAML Authentication (Will be Deprecated)	Workday plans to retire this field. Use the SP Initiated field in the SAML Identity Providers grid to configure IdPs for SP-initiated SAML authentication.	Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication
IdP SSO Service URL (Will be deprecated)	Workday plans to retire this field. Use the IdP SSO Service URL field in the SAML Identity Providers grid instead.	Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication

Option	Description	More Information
Sign SP-initiated Authentication Request (Will be deprecated)	Workday plans to retire this field. Use the Sign SP-initiated Request field in the SAML Identity Providers grid instead.	Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication
Do Not Deflate SP-initiated Authentication Request (Will be deprecated)	Workday plans to retire this field. Use the Do Not Deflate SP-initiated Request field in the SAML Identity Providers grid instead.	Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication
Always Require IdP Authentication (Will be deprecated)	Workday plans to retire this field. Use the Always Require IdP Authentication field in the SAML Identity Providers grid instead.	Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication
Authentication Request Signature Method	(For SP-initiated SAML authentication) Workday requires that you use SHA256.	Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication

Enable Signature KeyInfo Validation	Workday compares the optional SAML `keyInfo` element in incoming SAML messages with the SAML public key that your tenant stores. If the element contains an X.509 public key and:
	• If the public key in `keyInfo` matches the SAML public key Workday stores in your tenant, Workday processes the authentication request.
	• If the values don't match, Workday:
	    • Rejects the authentication request.
	    • Displays an error message on the Signons and Attempted Signons report.
		Steps: Set Up SAML Authentication

Additional Negative Skew (in minutes) Additional Positive Skew (in minutes)	The number of minutes to add to the `NotBefore/NotOnOrAfter` time (the current time minus/plus the skew time) when processing the validity of a SAML assertion. Workday enforces a combined 3-minute maximum in either direction	Steps: Set Up SAML Authentication

Option	Description	More Information
	from the `issueInstant` of the message and the current Workday server time. Skew is the difference between the Workday server time and your IdP server time.	

OpenID Connect Settings

To enable:

- OpenID Connect for your tenant, select the Enable OpenID Connect Authentication check box.
- Workday-delivered multifactor authentication for OpenID Connect on authentication policies, select the Enable Native Multi-Factor Authentication check box.

Option	Description	More Information
OpenID Connect Provider	Enables you to configure connection information for the OpenID Connect provider. Google is the only OpenID Connect provider Workday supports.	Enable OpenID Connect Authentication

Mobile Authentication

Option	Description	More Information

Enable Biometric Authentication	Enables fingerprint authentication for:
	• These Android devices that support biometrics:
	  • Google
	  • HTC
	  • Huawei Nexus 6P
	  • LG
	  • Motorola
	  • Samsung
	  • Sony
	• iPad or iPhone devices supporting Touch ID.
	Also enables users with supported iPhone devices to authenticate using Face ID. Workday automatically enables biometric authentication in the tenant.
		Steps: Set Up Mobile Authentication on page 196

Enable Mobile PIN Authentication	Enables mobile PIN authentication for your tenant so that users can sign in to Workday for Android, iPad, and iPhone using a PIN.	Steps: Set Up Mobile Authentication on page 196

Option	Description	More Information
PIN Min Length	The minimum PIN length is 4. Workday automatically populates the field with 6.	Steps: Set Up Mobile Authentication on page 196
PIN Max Length	The maximum PIN length is 8. Workday automatically populates the field with 8.	Steps: Set Up Mobile Authentication on page 196
PIN Max Failed Signin Attempts	The number of failed mobile PIN sign-in attempts, from 2 to 5, before Workday deletes the PIN. The user must then sign in to Workday using another authentication type. Workday automatically populates the field with 3. Note: This setting affects only mobile PIN authentication. For biometric authentication, the number of failed sign-in attempts is 3, after which the user must sign in to Workday using another authentication type.	Steps: Set Up Mobile Authentication on page 196
Max Mobile Authentication Age (in days)	The number of days, from 30 to 365, before Workday expires mobile PIN and biometric authentication. Upon expiration, the user must reset the PIN and reenable biometric authentication if they're using those features.	Steps: Set Up Mobile Authentication on page 196

Sensitive Data Enumeration

Option	Description	More Information
Disable Sensitive Data Enumeration Feature	Opts out of the sensitive data enumeration feature for the tenant. The sensitive data enumeration feature signs out all sessions and locks user accounts that repeatedly access these sensitive data groups over a short period of time: • Bank Account Number. • Person Birth Place. • Person Date of Birth. • Person Global Identifier. • Tax ID.	

Option	Description	More Information
	Example: Workday signs out user sessions and locks user accounts used by a malicious script that repeatedly accesses sensitive data groups.	

Trusted Devices

Option	Description	More Information
Disable Trusted Devices	Opts out of the trusted devices feature for the tenant. Workday automatically enables trusted devices in the tenant. Workday resets the trust relationship for all trusted devices in the tenant if you disable the trusted devices feature.	Steps: Set Up Trusted Devices

Multifactor Authentication Settings

Option	Description	More Information
Maximum Grace Signin Count	Sets the maximum number of times users can sign in before Workday requires them to enroll 1 of the multifactor authentication types you've enabled for them. Set to zero to enforce multifactor authentication enrollment for all users.	Edit Workday Accounts
Add Multi-Factor Authentication Provider	Click to add these multifactor authentication providers: • Authenticator App • Backup Codes • Duo • One Time Passcode - Email • One Time Passcode - SMS Add authenticator app before you add backup codes. Workday removes this button from the task once you've added all providers.	Steps: Set Up Multifactor Authentication Using Authenticator App Steps: Set Up Multifactor Authentication Using Duo Security Steps: Set Up Multifactor Authentication Using Emailed One-Time Passcode Steps: Set Up Multifactor Authentication Using SMS One-Time Passcode
Edit (for Authenticator App multifactor authentication provider).	Click to change the state of the Enabled check box.	Steps: Set Up Multifactor Authentication Using Authenticator App

Option	Description	More Information
Edit (for Backup Codes multifactor authentication provider).	Click to change the state of the Enabled check box and access this setting: • Max Backup Code Count: The number of authenticator app backup codes that Workday supplies to the user.	Steps: Set Up Multifactor Authentication Using Authenticator App
Edit (for Duo multifactor authentication provider).	Click to change the state of the Enabled check box and access these settings: • Auth Integration Key • Auth Secret Key • Admin Integration Key • Admin Secret Key The public and secret keys provided by Duo Security to protect the Workday and Admin API applications for your Duo trusted access account. See the Duo documentation for information on obtaining these keys and the API Hostname. • Username Format: Duo compares the information from Workday accounts that you specify here to identify Workday users in the Duo service.	Steps: Set Up Multifactor Authentication Using Duo Security Duo Protection for Workday
Edit (for One Time Passcode - Email multifactor authentication provider).	Click to change the state of the Enabled check box and access these settings: • Passcode Timeout (in minutes): Ensure that the default tenant and individual user session timeouts are more than 10 minutes if you set this parameter to 10 minutes. • Email Address for Passcode: Ensure that you also set up email addresses for users in the security groups you enable for One Time Passcode - Email	Steps: Set Up Multifactor Authentication Using Emailed One-Time Passcode

Option	Description	More Information
	multifactor authentication. Example: You: • Select Send to home email only here. • Configure a security policy to require One Time Passcode - Email multifactor authentication for the Benefits Administrator and Compensation Administrator security groups. Ensure that the users in those security groups have home email addresses included in their worker profiles. Note: The Email Address for Passcode setting is independent of the Enable Security Emails setting. You don't have to enable security emails for your users to receive one-time passcode emails.	
Edit (for One Time Passcode - SMS multifactor authentication provider).	Click to change the state of the Enabled check box and access these settings: • Passcode Timeout (in minutes): Ensure that the default tenant and individual user session timeouts are more than 10 minutes if you set this parameter to 10 minutes. • Allow Home Mobile for One Time Passcode: Enables users to select a mobile phone number for work or home from their contact information. They'll then receive a one-time passcode for accessing Workday at the selected mobile phone number.	Steps: Set Up Multifactor Authentication Using SMS One-Time Passcode

Option	Description	More Information
	• Carrier Name: Mobile phone carrier names must be unique. Note: Workday doesn't display the Carrier Name, SMS Email Gateway Prefix, and SMS Email Gateway Domain settings if you're using Twilio-based OTP delivery for SMS passcodes. SMS multifactor authentication that uses carrier-based delivery of SMS passcodes requires that mobile phone carriers support email to SMS gateway functionality without throttling. • SMS Email Gateway Prefix: Check with your mobile service provider for the Short Message Service (SMS) email gateway prefix for your carrier. To include the country code of the user dynamically in the SMS email gateway prefix, enter [country]. To include the number of the user in the prefix dynamically, enter [number]. • SMS Email Gateway Domain. Note: If you remove mobile phone carrier information for a carrier that's in use, users configured only for SMS one-time passcode through that carrier can't access Workday.	

Reference: Edit Tenant Setup - Student

Note: Workday does not guarantee or certify Federal or State regulatory compliance through use of its software. We provide tools that can help your institution be compliant. You are always responsible for ensuring you are compliant with your Federal and State regulatory obligations.

Manage tenant-wide settings for Student in these areas:

- ID Sequence Generators on page 163
- Tenant Options on page 163

- External Accounts on page 164
- Data Entry Check Options on page 164

ID Sequence Generators

Option	Description	More Information
ID Generator for Course Section Offering ID	Workday uses this generator to create the Offering ID on course sections. You can create your own ID generator using the Create ID Definition / Sequence Generator task.	Create ID Definitions and Sequence Generators on page 12 Create Course Sections
ID Generator for Student ID	Select an ID generator to identify each student with a unique number. Student IDs are specific to a student's identity as a student in Workday. They don't apply to any other identities the student might have in Workday.	Steps: Set Up Student IDs

Tenant Options

Option	Description	More Information
Use Universal ID instead of Student ID	Use Universal IDs for students and student prospects.	Steps: Set Up Student IDs
Include Student ID or Universal ID in Student Name	Includes the student ID or universal ID in student profiles.	Steps: Set Up Student IDs
Override Display ID for Student Worktag	Enables you to configure student worktags to display either: • Student name with student ID appended. • Student ID only. • Student name only.	Setup Considerations: Accounting and Worktags for Student Financials
Hide Institutions from Student Profile Subtitle	Removes all associated institutions from student profiles.	Steps: Set Up Student Data
Allow Applies to All Holds	Enables the use of the Applies to All hold context on student holds. When you clear this option, the Applies to All hold context isn’t available to select as a hold context.	Concept: Student Holds
Select Default Profile View	Displays the profile that you want to have as the default profile view for student workers.	Steps: Set Up Student Data
Enable Processing of Merged Student in Web Services	Enables you to process Education Test Results and Transcript data of an existing	Merge Student Prospect and Student Applicant Records

Option	Description	More Information
	duplicate student during a merge event using these web services: • *Import External Student Results* • *Import External Student Transcript* • *Put External Student Results* • *Put Internal Student Transcript*	

External Accounts

Option	Description	More Information
Student External Account Name	Displays the account name in the subject header of the account verification and password reset emails used for the External Student site. When the field is blank, Student displays in the email subject header by default.	Steps: Set Up Student Sites

Data Entry Check Options

Option	Description	More Information
Switch on Data Entry Check everywhere	If selected (default), Workday enables the Data Entry Check (DEC) functionality for Student. If you want to use DEC for only select items, select Select areas to switch on Data Entry Check and configure which items to enable for DEC.	Edit Cost of Attendance Manage Instructor Load

Reference: Edit Tenant Setup - System

Manage tenant-wide settings for Workday in these areas:

- Information on page 165
- Default Values on page 168
- Time Zone Configuration on page 170
- Name & Address Display on page 174
- System Setup on page 175
- Activity Stream Settings on page 178
- Mobile on page 178
- Location Services on page 181
- My Tasks Settings on page 182
- Customer Central on page 182
- User Activity Logging on page 182

- User Feedback on page 183
- Media Settings on page 183

Information

Option	Description	More Information
System Title	Sets the name that displays on Workday-generated emails. Workday also includes this title in the delivered text at the bottom of the Workday sign-in page.	Note: We plan to retire System Title in a future update.
Signon Formal Note	Sets any Workday terms and conditions specific to your company that display in the Notice to Users. Example: A required notice from a government agency or a notice about protecting intellectual property. You can select your own colors, fonts, and emphasis. You can provide translations for this field. The note you enter here displays only on the Workday sign-in page. It won't display on the Single Sign-On (SSO) sign-in page if you use SSO.	Reference: Set Up Help for Self-Service Users on page 332
Signon Custom Message	Sets any additional information to display on the sign-in page. You can select your own colors, fonts, and emphasis. You can provide translations for this field. The message you enter here displays only on the Workday sign-in page. It won't display on the Single Sign-On (SSO) sign-in page if you use SSO.	
Error Message for Browser	Sets the custom message that displays to users who aren't using a Workday-supported browser. If you don't configure this message, Workday displays a default message that it doesn't support the browser.	
Media Marking Text	Sets the custom text that displays on printable pages such as report pages. Use the	

Option	Description	More Information
	custom text to remind workers that content might include: • Sensitive information. • Intellectual property. • Personal data. • Items that are for business or official use only. Workday restricts Media Marking Text to 1 line. If the text exceeds 50% of the page width, Workday automatically truncates the text to fit on the page.	
Signon Tenant Logo	Sets the logo to display on the sign-in page. You can select an existing logo or upload your own. The graphics file should be no larger than 250 x 95 pixels. Workday doesn't support the CMYK color space. The logo you select here displays only on the Workday sign-in page. It won't display on the Single Sign-On (SSO) sign-in page if you use SSO.	
Print Tenant Logo	Sets the logo to display on printed pages of documents.	
Signon Tenant Image	Sets the image that displays across the entire Workday sign-in page. The Signon Tenant Image must be a landscape image. As you select an image, consider that Workday: • Covers the left portion of your image with a transparent, blue overlay. • Stretches or crops the image to fit different display resolutions. Use a high-resolution image with 1920 x 1080 pixels, and test how the image displays on the display resolution that most of your users have. The image you select here displays only on the Workday sign-in page. It won't display on	

Option	Description	More Information
	the Single Sign-On (SSO) sign-in page if you use SSO.	
Quick Tips 'Learn More' Link	(Optional) Sets the Quicklink to use for the Learn More button that displays with landing page tips when your users sign in for the first time. Workday recommends that you create a Quicklink to your help or training documentation and select it from the prompt. If you don't select a Quicklink, the Learn More button doesn't display. When displaying the Learn More button, Workday adheres to the security and condition rules of the selected Quicklink. You can specify more than 1 Quicklink to provide different links to different users, based on the security and condition rules. If the security and condition rules resolve to more than 1 link for a given user, Workday selects 1 link.	
Always Show Guided Tours	Enables you to display all guided tours that you configure on tasks in your tenant automatically.	Set Up Guided Tours on page 316
Disable Blue Primary Buttons	Changes blue buttons in Workday to orange. Sign out and sign in for the change to take effect.	
Opt-out of Right Aligned Buttons	If selected, Workday aligns the default button and toolbar on the left for languages that read left to right. For languages that read right to left, Workday aligns the default button and toolbar on the right. Users must sign out and sign back in to Workday for the changes to take effect.	
'Help' Link	(Optional) Enables the Help option on the main menu with a link to the URL for your end-user documentation.	Reference: Set Up Help for Self-Service Users on page 332
Downtime Service URL	Enter a URL for a page that external users see during the weekly maintenance	Workday 32 What's New Post: Configurable Downtime URL

Option	Description	More Information
	service window in this format: `https://...` The Downtime Service URL might not be available during quarterly and monthly Workday maintenance windows. You can only test the Downtime Service URL during the Workday maintenance service window. See: • Workday Community: Scheduled Maintenance. • Workday Community: Weekly Service Updates. If you don't configure a URL, external users see the standard Workday downtime page. If users attempt to access Workday from a bookmarked URL with *authgwy* in the web address during the maintenance service window, they see the standard Workday downtime page. Point the Downtime Service URL to a customer maintained web page that informs users that the Workday application is unavailable. Don't point the Downtime Service URL back to a Workday tenant URL.	Workday Community: Scheduled Maintenance

Default Values

Option	Description	More Information
Default Currency	Sets the default for all currency-related values in Workday. In the Currency prompt: • Preferred Currencies are set in the Frequently Used Values section on the Edit Tenant Setup - Global task. • Retired Currencies apply to older transactions; don't use these options.	Steps: Set Up Currencies on page 336
Default Currency Rate Type	Sets the rate type for the Default Currency for the tenant. To set a default currency rate type for	Concept: Rates, Rate Types, and Conversion

Option	Description	More Information
	a company, use the Currency Rate Type Override on the Edit Company Accounting Details task.	
Preferred Currency Rate Type	Sets the currency rate type for the worker-selected Preferred Currency.	
Default Country for Name and Address	Sets the default country to use for a worker whose business site location is undefined.	
Country Phone Code	Adds the selected country calling code when entering a new phone number.	
Phone Number View Format	Sets the phone number display format in Workday for all phone numbers that you can view: • E164: +19256578675 • International: (default) +1 925-657-8675 • National: (925) 657-8675 • Workday Traditional Phone Format: +1 (925) 6578675	
Default Locale	Sets the default locale for each new user and determines which country-specific data a user sees. Workday uses this setting to format items such as currency, date, and time. Workday displays some system-generated text, such as day and month names, in the language associated with the locale. Applies only to users that: • Don't inherit a locale or display language from a business site location. • Haven't used the Change Preferences task to set a locale or display language.	Concept: Country-Specific Information, Locales, and Languages on page 356
Default Display Language	Identifies the display language associated with the Default Locale. Specify a Preferred Display Language to override this setting for the tenant.	
Preferred Display Language	Sets the preferred display language for users that inherit	

Option	Description	More Information
	their locale from the Default Locale for the tenant. Overrides the Default Display Language. Applies only to users that: • Don't inherit a locale or display language from a business site location. • Haven't used the Change Preferences task to set a locale or display language.	
Include National Prefix	Includes the National Prefix when you save a new phone number. This setting affects: • How Workday displays new phone numbers that use the Workday Traditional Phone Format. • Web service fields that use an Area Code. This setting doesn't affect phone numbers that use E164, International, or National formats.	

Time Zone Configuration

Option	Description	More Information
Default Timezone	Sets the default time zone for this tenant. If you don't select a time zone, Workday uses Pacific Time. Use the Configure Preferred Time Zones task to configure the time zones that Workday displays in this prompt. Workday honors all IANA (Internet Assigned Numbers Authority) supported time zones, regardless of the preferred time zones you configure.	
Role Assignment Time Zone Option	Sets the time zone to use for role assignments: • Tenant Default: Workday uses the time zone in the Default Timezone prompt to determine when role assignments take effect.	Concept: Role Assignments and the Snapshot Date Model on page 916 Concept: Roles Assignments, Positions and Role Inheritance on page 913

Option	Description	More Information
	• Assignee Location: Workday uses the time zone of the role holder's position. When you configure 1 of these time zone options, Workday recommends that you also: • Opt in to the Workday 32 - Time Zone functionality by accessing the Maintain Feature Opt-Ins report. • Configure the *Manage: Role Assignment Time Zone* domain so that you can override default time zones in role assignment tasks. Workday uses Pacific Time for role assignments when you select: • Assignee Location and you use the Assign Role task from the related actions menu on an organization. • Either Tenant Default or Assignee Location and you assign a role using a subprocess of some role-related business processes. Once you select 1 of these options: • You can't disable the time zone functionality. • When adding, removing, or changing a role assignment on a task or business process, you can specify the time zone. If you don't select an option, role assignments take effect based on Pacific Time.	
Business Process Date Calculation Time Zone	Workday uses the selected time zone for calculating the date of a business process step delay and custom notification delay. Available options are:	Maintain Step Delay on page 1015

Option	Description	More Information

	• Workday Default Time Zone Settings (PST): Workday automatically selects this option, which defaults to Pacific Standard Time (PST). When you select this option, Workday resumes all delayed steps and notifications in PST.
	• Tenant Default Time Zone Settings: Workday uses the value from the Default Timezone prompt to calculate step delay and notification delay. Workday resumes all delayed steps and notification delays based on the selected time zone. When you don't select a value in the Default Timezone field, we use:
	    • PST to calculate the step delay.
	    • The time zone of the person receiving the custom notification to calculate the notification delay. But if the person receiving the notification doesn't have a time zone, we use PST to calculate the notification delay.
	• Event Related Time Zone: Workday resumes delayed steps and notifications based on the time zone in the following order. When the:
	    1. Event is about a worker, we use the time zone of that worker.
	    2. Event isn't about a worker (such as a supplier invoice) but a	

Option	Description	More Information
	worker initiates the event, we use the initiator's time zone to calculate when the delay trigger begins. When the initiating action is delegated, we use the time zone of the delegator and not the delegate's time zone. 3. Notification is sent to a person, we use the time zone of that person. Note: This only applies to notification delays and not step delays. 4. Person receiving the notification doesn't have a time zone, we use the Default Timezone field configuration. But if the Default Timezone field doesn't have a value, we use PST to resume notification delays. Note: This only applies to notification delays and not step delays. 5. Event isn't about a worker and wasn't initiated by a worker, we use PST to resume step delays.	
Business Process Configuration Time Zone	Enables you to override the default time zone on business process configuration tasks. Example: adding steps, creating condition rules, or creating notifications. If you select the check box, a Time Zone prompt displays on	

Option	Description	More Information
	business process configuration tasks. If you don't select the check box, Workday uses Pacific Time.	

Name & Address Display

Option	Description	More Information
General Name Display Type	Sets the name display type for all tasks and global search results in Workday: • Legal displays the legal name of the worker and candidate (if applicable). • Preferred displays the colloquial name of the worker and candidate (if applicable). • Legal and Preferred displays both the legal and colloquial names of the worker and candidate (if applicable). Workday uses the General Name Display Type in reports and global search results that include a worker instance, even if you select a different Reporting Name Display Type.	Steps: Set Up Worker Names
General Name Display Format	Sets the name display format for all tasks in Workday: • Long: Full name format (David Alan Smith). • Reporting: Last-name-first format (Smith, David Alan). • Short (Recommended): Short name format (David Smith).	Steps: Set Up Worker Names
Reporting Name Display Type	Sets the name display type for all reports in Workday, either Legal or Preferred.	
Reporting Name Display Format	Sets the name display format for all reports in Workday, either Long, Reporting, or Short.	

System Setup

Option	Description	More Information
Default Sequence Generator Notification Group	Sets the security groups to which Workday sends notifications when a sequence generator approaches an overflow condition. An overflow condition occurs when the sequence number generated by a sequence generator reaches the limit imposed by its Padding value. If you don't select default sequence generator notification groups on this task, Workday automatically sends notifications to the security groups assigned in *Set Up: System* domain for all sequence generators. You can override the default sequence generator notification groups for a specific sequence generator on the create or edit tasks for that sequence generator.	Create ID Definitions and Sequence Generators on page 12
ID Definition for Universal Id	Sets the ID definition to use for identifying a person with a unique number. Universal IDs remain consistent for a person across these person types: • Contingent Workers • Employees • Pre-hires • Prospects • Students	Create ID Definitions and Sequence Generators on page 12 Steps: Set Up Workday IDs Steps: Set Up Student IDs
Enable Postal Code Validation	Validates postal codes for US and Canadian addresses that you enter after enabling this option.	
Allow Attachments within Emails	Enables attachments in notification emails. You can select from a list of predetermined fields defined for the business process definition. This option displays only if the Allow Attachments within Emails option is selected in the business process security policy. If you enable attachments, a list of predefined attachments displays as report fields. You can't select a file	

Option	Description	More Information
	from your computer. Workday doesn't scan attachments for viruses.	
Allotted Insight Foundation Storage (TB)	Indicates the amount of storage allotted for Workday Insight Foundation data. You can't change this setting.	
Maximum Attachment Size (KB)	Specifies the maximum file size for attachments, such as resumes or backup for invoices. You can't change this setting.	Reference: File Size and Printing Limits on page 720
Maximum Image Size (KB)	Specifies the maximum file size for images. You can't change this setting.	Reference: File Size and Printing Limits on page 720
File to be Deleted After (Days)	Specifies the number of days that Workday retains generated documents or reports that don't have a specified retention period.	
Force printed PDFs to download	Disables a default data security feature that opens printed PDF files of all business form layouts directly in the web browser. Enable only if you want to force all these PDFs to download.	
File Type Setup Instructions	Sets the file types that users can upload into Workday: • Allow All File Types accepts any file type supported by Workday. • Allow ONLY Specific File Types restricts the list of supported file types. The list of file type restrictions doesn't apply to Workday Media Cloud. Refer to the Supported Video File Types section on our Streaming Video Community page for more details. To view a list of all supported file types for your tenant, select the Allow ONLY Specific File Types prompt, then select All. If you select Allow ONLY Specific File Types, verify that the list of allowed file types includes all file types that your	

Option	Description	More Information
	Workday tenant needs to support. Blocked file types: • bas • bat • com • exe • js • lnk • ocx • reg • sct • sys • vb • vbe • vbs • wsc • wsf • wsh	
Enable Content Delivery Network	Enables the Content Delivery Network (CDN) to cache Workday data locally on servers nearer to your users. The CDN can improve web performance for offices located in low-bandwidth areas or far from Workday data centers.	Concept: Content Delivery Network (CDN)
Disable Content Delivery Network for Customer Data with China Domains	Disables media and packaged content from caching on China domains. When you select both Enable Content Delivery Network and Disable Content Delivery Network for Customer Data with China Domains, you enable local caching in all regions except China.	
Disable My Shortcuts In Quick Access	Disables shortcuts on the Quick Access menu and prevents users from viewing Workday-delivered tasks they don't need access to. Note: When you select this check box, changes don't apply until after 30 minutes. Workday recommends that you sign out of Workday and then sign in again for this setting to take effect.	

Option	Description	More Information
Restrict Org Hierarchical Prompt Based on Visibility	Restricts the *Active Organizations by Hierarchy* option on Organizations prompts to display only hierarchies that the user can see based on visibility settings on the organization.	
Disable Clicking on Phone Numbers	Disables hyperlinks that enable users to call telephone numbers on Workday for Android, iPad, and iPhone. This feature is available for mobile devices only and isn't supported on desktop.	
Purging Warning Message	Sets a custom message that Workday displays when you confirm a purge of person privacy data. Workday displays the custom message above and in addition to the standard disclaimer.	Steps: Purge Person Privacy Data
Enable Workday for Outlook	Enables Workday for Outlook® in your tenant. Workday for Outlook® is currently unavailable for new accounts. You must have completed Workday for Outlook® setup configurations previously to use this feature.	Note: Workday plans to retire the Workday for Outlook® feature in a future update. To approve time off requests and look up worker information from within Office 365, we recommend using Workday for Microsoft Teams.

Activity Stream Settings

Option	Description	More Information
Selected Objects for Activity Stream	Enables activity streams for the selected objects.	Steps: Enable Activity Stream on page 1364
Environment(s)	Enables activity streams for the selected environments. Note: To enable activity streams for your Sandbox Preview or Implementation Preview tenants, select *SANDBOX* or *IMPL* respectively. Those environments also apply to the respective preview tenants.	Steps: Enable Activity Stream on page 1364

Mobile

These settings only apply to Workday mobile applications, not Workday on mobile web browsers.

Option	Description	More Information
Enable Attachments to be Imported From or Shared With External Sources	Ensures that users have access to Workday documents and attachments on their mobile devices using third-party mobile apps. By default, this check box is unchecked, which means: • Workday on iPad and iPhone users can preview most Workday documents and attachments. The mobile devices need a third-party application to open XLS and XLSX files. • Workday on Android users can preview most Workday documents and attachments. The mobile devices need a third-party application to open.doc, .docx, XLS, and XLSX files. Consider the limitations of leaving this check box clear and your company security policies. You might require users to install and use apps from trusted publishers only. Workers can access Payslips regardless of this setting.	Concept: Mobile Devices and Features on page 192
Disable Check In/Out on Mobile	Disables mobile check-in and check-out on Workday for: • Android • iPad • iPhone	
Disable Org Chart on Mobile	Disables display of organization charts on Workday for: • Android • iPad • iPhone	
Disable My Reports On Mobile	Disables access to My Reports on Workday for: • Android • iPad • iPhone	
Disable Add To Contact	Disables the Add To Contact command from the Action menu on worker profiles on mobile devices.	

Option	Description	More Information
Disable Mail To	Prevents native mail apps from opening on a mobile device when users click a mail link within Workday mobile apps on: • Android • iPad • iPhone	
Deter Screenshots	Deters users from taking screenshots while signed in to Workday mobile apps by: • Alerting users who take screenshots on iPad and iPhone devices that your company prohibits taking screenshots. • Obscuring the display of screenshot images when users on Android devices attempt to open them.	
Disable Mobile App Store Links	Disables the links that direct users to either Google Play or the App Store to download Workday on Android, iPad, and iPhone. You can access these links from the pop-up that displays: • On the Home page, when you sign in to Workday on a desktop web browser. • On the web banner, when you sign in to Workday on a mobile device web browser. Only users with access to mobile security domains can see the pop-up.	Concept: Best Practices for Mobile Adoption on page 194
Enable Voice in Assistant on Mobile	Enables users to use voice interactions to communicate with Workday Assistant on mobile applications. When you select the check box, users must also enable these permissions on their mobile device: • Microphone for Android devices. • Microphone and speech recognition for iPad and iPhone devices.	Steps: Set Up Workday Assistant

Option	Description	More Information
	When you enable voice interactions, Workday Assistant doesn't read personal or private information out loud.	
Disable Automatic Tenant Configuration Links	Enables users to scan a QR code using any QR code scanner on their mobile device to connect to your tenant automatically. Users can access the unique QR code for your tenant from the pop-up that displays: • On the Home page, when they sign in to Workday on a desktop web browser. • When they click Organization ID on the My Account menu on desktop, Android, iPad, and iPhone. To use this feature, clear the Disable Mobile App Store Links check box. Note: The QR code uses Google Firebase Dynamic Links to automatically populate the correct tenant and web address for users. If you disable this feature, users can only scan the QR code with the QR code scanner built into the Workday mobile application.	Concept: Best Practices for Mobile Adoption on page 194
Hide Links to Workday on Web	Hides buttons that direct users to Workday on the mobile browser instead of Workday on Android, iPad, and iPhone.	

Location Services

Option	Description	More Information
Disable Location Service	Select to turn off Google or Apple location services for Workday mobile features that use them: • On a worker profile, Location uses Google or Apple Maps to display work location.	Reference: Edit Tenant Setup - HCM on page 72

Option	Description	More Information
	• When a user checks in or checks out, Workday uses Google or Apple Maps to display the work locations for your company centered on the user. This functionality is disabled if you use Standard Mobile Check-In. • If you configured geofences for mobile, Workday uses native mobile location services to disable check-ins and check-outs for users outside configured geofences.	

My Tasks Settings

Option	Description	More Information
Limit My Tasks Badge Count	Limits the task count on your My Tasks icon to 999 when you have 1000 or more tasks, enabling Workday to load faster. You can still receive new tasks in My Tasks when you have 1000 or more tasks.	

Customer Central

Option	Description	More Information
Enable Customer Central Access	Enables Customer Central to access the tenant. Customer Central is a separate Workday tenant designed to simplify and centralize the deployment process. You can only enable Customer Central access for nonproduction tenants.	Workday Community: Customer Central

User Activity Logging

Option	Description	More Information
Enable User Activity Logging	Enables Workday to log user activity events within the tenant. You can clear the check box to stop logging user activity	Concept: User Activity Logging on page 707

Option	Description	More Information
	events. When you disable user activity logging, Workday doesn't display user activity events in the View User Activity report. Note: Review your internal security and privacy (GDPR) procedures to determine how you want to use the user activity logging functionality.	

User Feedback

Option	Description	More Information
Opt-out of Intercept Survey	Enables you to opt-out of displaying the User Feedback Survey pop-up for all the users in your tenant. When you select the Opt-out of Intercept Survey, Workday doesn't send your users the pop-up survey.	Workday Community: User Experience Survey for Workday

Media Settings

When you update settings in this section, Workday processes requests for up to 5 minutes before the changes take effect in your tenant.

Option	Description	More Information
Default Media Acceptable Use Policy Text	Enables you to change the text for the Acceptable Use Policy (AUP), which users need to read before uploading video content on the: • Create Lesson task. • Create Media Import Job report. Leave blank to use the default value: Ready to upload your content? Before you do, verify that it contains no infringing material and that it complies with: • The policies of your organization. • Workday's Acceptable Use Policy.	Steps: Manage Learning Content
Default Media Acceptable Use Policy URL	Enables you to change the default URL for the AUP.	Workday Community: Workday Acceptable Use Policy

Option	Description	More Information
Person Type	Enables the selected person type to have a specified: • Media Acceptable Use Policy Text. • Media Acceptable Use Policy URL.	
Default Video Playback Quality	Automatically plays desktop and Android application Workday videos, except for videos in packaged content, in a specified quality to reduce the chance of buffering. Viewers can manually change the quality during playback. Leave blank or select *Auto* to playback videos in the quality that works best for most networks. If you upload a video that supports a lower quality than the default quality you select, Workday plays the video in the highest quality that your video supports.	FAQ: Uploading and Viewing Videos on page 455
Video Captioning	Enable Workday to automatically generate video transcriptions and display transcription text next to videos during playback. Generated transcriptions: • Are only available in English. • Are only available for videos shorter than 4 hours. • Vary in quality, depending on the clarity of speech in a video. When you want Workday to automatically generate video captions, but not automatically display them, you must: • Select the *Enable automatic video captioning with manual review* option. • Set the corresponding language on the Captions tab on the Edit Media task for each video.	

Option	Description	More Information
	To use automatic video captioning, you might need to take additional steps to set up Media Cloud based on your organization's subscription service agreement. See Workday Community: Getting Started with Workday Media Cloud.	
Increase Maximum Upload Size	Enables you to increase the maximum media upload size from 2GB to: • 4GB for SCORM files. • 20GB for video files. Workday Media scans files for viruses only if the file size is 2GB or smaller.	

Related Information
Concepts
Concept: Organization Charts on page 863
Concept: Membership Rules on page 880
Tasks
Set Up Supervisory Organizations on page 840
Steps: Set Up Org Studio on page 888
Steps: Assign Membership Rules in Custom Organizations on page 874
Manage Membership Rules on page 879
Reference
Workday Community: Workday Browser Support Policy
Workday 31 What's New Post: Video Intelligence

Mobile Setup

Setup Considerations: Mobile Applications

Note: The solutions described in this section are not part of the Workday Service. See Legal Notice for details.

You can use this topic to help make decisions when planning your configuration and use of Workday on Android and iOS. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Workday provides mobile applications so users can easily access and complete self-service tasks and view reports. Workday uses the same security model and applies the same feature configurations across all platforms. Setup for Workday mobile applications requires minimal mobile-specific configuration.

Business Benefits

Mobile apps increase productivity and are convenient for users who:

- Don't have consistent access to a desktop computer.
- Frequently need to complete quick transactions. Examples: Employees checking in and out or managers approving time off.

Use Cases

Use cases for Workday mobile applications vary, depending on the products that your tenant uses. These are example use cases for some products with mobile feature availability:

Product	Example Use Case
Absence	Employees can request time off. Managers can approve time off.
Analytics	Employees can access dashboards and reports. Leaders can view metrics and key performance indicators (KPIs).
Benefits	Employees can complete open enrollment.
Expenses	Employees can create expense reports and use their camera to scan receipts for expenses.
Human Capital Management	Employees can access worker information on worker profiles and view organization chart details.
Learning	Employees can view or create learning content.
Pay	Employees can view payslips.
Recruiting	Recruiters can access reports and tasks for managing candidates and open jobs.
Student	Students can enroll in classes, view their schedule and grades, and request transcripts. Administrators can create student prospects, and add academic records and advising notes.
Talent and Performance	Employees and managers can view and complete performance reviews.
Time Tracking	Employees can check in or out, enter time, and view their work schedules.

Questions to Consider

Question	Considerations
How do your employees use Workday?	Consider the habits and needs of self-service users. They can benefit from mobile if your company has: • A workforce dispersed across many locations. Example: Companies in the retail industry. • Employees who don't have regular or reliable access to desktop computers. • Employees who need quicker options for accessing commonly used tasks. • Managers who are frequently away from the office and need to approve items in My Tasks.
Which authentication options are most practical for your company and users?	Review: • The mobile authentication options and the security policies for your company. • Existing Workday authentication policies for the desktop experience to understand how they might impact mobile authentication. Single Sign-On (SSO) and multifactor authentication both require several steps for users to sign in and can make signing in more difficult for mobile users. Biometric authentication enables a more streamlined sign-in and better user experience for employees, while offering the same amount of security and protection as other authentication methods.
What data and device usage policies does your company have?	Consider whether to enable users to: • Access company information in Workday remotely or only on premises, using authentication policies with network restrictions. • Use their own mobile devices or managed devices. You can use authentication policies, tenant setup settings, and mobile device management (MDM) solutions to manage mobile usage and privileges.

Recommendations

Before enabling the mobile usage domains, Workday recommends that you set up:

- Authentication for enhanced security and easier sign-in.
- Push notifications to increase engagement and usage.
- The new Absence Calendar Experience on desktop and mobile.

Requirements

Configure the mobile usage security domains to set up the mobile apps so users can access Workday on mobile.

Limitations

Because Workday designs mobile applications for the self-service user, not all features are available. Run the List Tasks Available on Mobile report to see which business processes and actions you can complete on each platform.

While the mobile apps have limited functionality, you can access features available on the Workday browser application. To access features on the Workday browser application, enter your tenant URL in a mobile web browser.

Tenant Setup

Access the Mobile section on the Edit Tenant Setup - System task to view mobile-specific tenant configuration options.

It's more common to control checking in and out with authentication policies instead of using the Disable Check In/Out on Mobile check box.

You can remove the View PDF Statement button from payslips using the Disable Payslip Printing (Business Form)check box on the Edit Tenant Setup - Payroll task.

Security

Users with access to these domains in the System functional area can sign in to Workday on a mobile device:

- *Mobile Usage - Android*
- *Mobile Usage - iPad*
- *Mobile Usage - iPhone*

The Workday mobile applications don't store or cache any business data on mobile devices. They only store simple settings, such as the tenant web address and tenant name. An exception is when you view PDF or Excel files. Workday caches these files for the duration of your sign-in session. To restrict file export, you can create an authentication policy with an access restriction that excludes the export to PDF and Excel functionality. The other features commonly included in authentication policy network restrictions are:

- Check in and check out.
- Payment elections.

Business Processes

No impact.

Reporting

No impact.

Integrations

No impact.

Connections and Touchpoints

No impact.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships across your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Other Impacts

No impact.

Related Information

Concepts

Concept: Best Practices for Mobile Adoption on page 194

Concept: Mobile Authentication on page 199

Concept: Authentication Policies

Reference

The Next Level: Analyzing Talent with Dashboards, Reports, and Mobile Devices

The Next Level: Breaking Through With Mobile

The Next Level: Mobile Adoption Playbook - COVID-19

The Next Level: Know Your Mobile App 101

The Next Level: Nurture and Grow Your Talent with Mobile

The Next Level: All Things 2023R2 and R2+ on the Workday Mobile App

The Next Level: Mobile Adoption Guide

Workday Mobile Authentication and Security FAQ

Steps: Set Up Workday Mobile Applications

Prerequisites

- Review setup considerations for mobile applications.
- Ensure that users have:
  - iPad and iPhone devices running iOS 17.0 and higher.
  - Devices running Android 12.0 and higher.

Context

You can configure your tenant for Workday on Android, iPad, and iPhone.

Steps

1. (Optional) Set up mobile PIN and biometric authentication.

   See Steps: Set Up Mobile Authentication.
2. (Optional) Set Up Mobile Push Notifications on page 191
3. Edit Domain Security Policies.

   Configure the security policies for these domains in the System functional area:

   - *Mobile Usage - Android*
   - *Mobile Usage - iPad*
   - *Mobile Usage - iPhone*

   You can also configure these additional mobile-specific domains in the System functional area:

   - *Worklet: Dashboard* enables users to view dashboards they have access to.
   - *Self-Service: Notebooks* enables iPad users to group worker profiles and reports for quick reference. They can create, view, and share notebooks with other users.

4. (Optional) Set up restrictions for remote access to Workday.

   Create authentication policies with IP restrictions to control remote access to Workday across all platforms and device types.

   See Steps: Set Up Authentication Policies.
5. (Optional) Enable Single Sign-On (SSO) for Mobile on page 197.
6. (Optional) Test features in a preview environment.

   To connect to your preview tenant on a mobile device, make sure you're using the latest version of the mobile app. In the app settings, enter your Tenant name and Web Address.

Result

Users can sign in to Workday on an Android, iPad, or iPhone after they enter the web address and tenant information for your company in the app settings.

Related Information

Concepts

Concept: Mobile Devices and Features on page 192

Setup Considerations: Mobile Applications on page 185

Reference

Reference: Edit Tenant Setup - Reporting and Analytics on page 142

Steps: Set Up Team Profile for Mobile

Context

You can configure the Team Profile, which displays the Team worklet on the Home page for managers on Workday for:

- Android
- iPad
- iPhone

Steps

1. Edit Domain Security Policies.

   Configure the security policies for these domains:

   - *Self-Service: Current Staffing Information* in the Staffing functional area.
   - *Worker Data: Anniversaries/Birthdays Reports* in the Staffing functional area.
   - *Worker Data: Current Staffing Information* in the Staffing functional area.
   - *Worker Data: Employee Reviews* in the Performance Enablement functional area.
   - *Worker Data: Leave of Absence* in the Time Off and Leave functional area.
   - *Worker Data: Time Off* in the Time Off and Leave functional area.
2. Configure Profiles and Profile Groups.

   Configure the *Team Profile* and the select the profile groups you want to display on it.

   You can select the reports that display on these profile groups:

   - *Compensation for Team Profile*.
   - *Matrix Team Members for Team Profile*.
   - *Stats for Team Profile*.
   - *Talent & Performance for Team Profile*.

Set Up Mobile Push Notifications

Prerequisites

Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Context

You can enable users to receive push notifications on their mobile device for certain types of Workday notifications. Workday supports mobile push notifications for these devices:

- Android
- iPad and iPhone

Steps

1. Edit Domain Security Policies.

   Set up security for these domains in the System functional area:

   - *Manage Mobile Notifications* gives administrators access to the Turn Off Mobile Notifications for Worker task.
   - *Self-Service: Mobile Notifications* gives workers access to the Turn Off Mobile Notifications task.
2. Access the Edit Tenant Setup - Notifications task.
3. In the Mobile App Notification Settings section, select these check boxes:
   - Enable Apple Push Notifications
   - Enable Google Cloud Messaging
4. In the Notification Delivery Settings section, for a desired notification type, select or create a routing rule from the Rule prompt that enables *Mobile Push Notification* as a Channel and *Immediately* as the Default Frequency.

Result

Workday sends push notifications for the notification types you've enabled.

Next Steps

To verify that their mobile device and Workday settings permit push notifications, your users need to:

- Check their delivery settings on the Change Preferences task.
- Configure their mobile device settings to enable push notifications.
- Enable notifications from the Settings menu in the Workday mobile app.
- Grant Workday permission to send them push notifications when they first sign in.

Related Information

Concepts

Concept: Notifications on page 256

Reference

Reference: Edit Tenant Setup - Notifications on page 107

Configure Faceted Search Reports for Mobile

Prerequisites

- Create a custom faceted search report.
- Security: *Set Up: System* domain in the System functional area.

Context

Use the Maintain Mobile Menu Task Overrides task to select a custom report to display (instead of the standard reports) for these faceted search reports on mobile:

- People (Find Workers)
- Find Candidates
- Find Jobs

Steps

1. Access the Maintain Mobile Menu Task Overrides task.
2. Select the Task (which corresponds to the standard report) you want to override, and the Override report you want to replace it with.
    - Find Workers replaces the standard report displayed for the People option.
    - My Candidates replaces the standard report displayed for the Recruiting > Find Candidates option.
    - Find Jobs replaces the standard report displayed for the Careers > Find Jobs option.
3. (Optional) Select a Label Override for the mobile option.

Result

Your custom report displays instead of the standard report for Workday on Android, iPad, and iPhone.

Related Information
Concepts
Concept: Finding Workers
Concept: Find Candidates

Concept: Mobile Devices and Features

You can enable Workday mobile apps to make it easier for users to complete many self-service tasks on their mobile phones and tablets. Workday provides mobile apps for:

- iPad and iPhone devices running iOS 17.0 or higher.
- Devices running Android 12.0 or higher.

You can also use a supported mobile browser to access the Workday web application using this URL pattern:

```
https://<workdayhost>/<tenantname>/login.htmld
```

User Preferences

Users can access the Change Preferences task on Workday for Android, iPad, and iPhone, enabling them to change user preferences, including:

- Preferred currency.
- Preferred language.
- Preferred locale.

Tenant and Organization Switching

Users can add, manage, and sign in to multiple Workday tenants and organizations (Example: Companies) from the Workday mobile apps. Users can switch between tenants on the Home page and on the sign-in page.

Feature Availability

Workday enables features on mobile by their domain security policies. You can verify that they're enabled by viewing their domain security policies. A few features require additional mobile-specific setup. To ensure full functionality of features available on mobile, users should use the latest version of the Workday mobile app.

This table provides a high-level description of the main features that you can make available on mobile. For more information about task and feature availability, you can run the List Tasks Available on Mobile report.

Mobile Feature	Description
Absence	View absence balances and request, correct, and cancel absence.
Benefits	View and elect benefits during open enrollment.
Careers	Search for jobs and refer candidates.
Dashboards	View Workday-delivered and custom dashboards.
Drive	View files and access Workday-supported files in Drive. You can access non-supported files when you also have the appropriate third-party apps for the various file formats.
Expenses	Collect receipts and submit expense reports. To create a new expense line item quickly, users can share photos of receipts taken by their device camera with the native Workday app.
Help	Create and view support cases. Access and view Help articles.
My Tasks	Access My Tasks to complete mobile-enabled tasks.
Inventory	Manage inventory tasks.
Journeys	View and access all assigned Journeys.
Learning	Browse and view learning content.
My Reports	View report output and generated PDF documents.
Notifications	Receive mobile push notifications.
Notebooks	Organize worker profiles and reports for quick reference (on Workday for iPad only).
Opportunity Marketplace	View available internal work opportunities based on skills and interests.
Org Chart	View organization charts and metrics.
Pay	View payslips.
People	Access the Find Workers report to search for people.
Projects	View project details.
Proxy Access to Non-Production Tenants	Provide proxy access to your non-Production Workday environment for certain users. If you

Mobile Feature	Description
	have off-site network restrictions that affect mobile applications, add the Proxy Access security group to the Employee Off Network access restrictions in your tenants.
Recruiting (Staffing)	Search for candidates and view details for candidates, jobs, and prospects. If you don't enable the Recruiting functional area, Workday displays Staffing.
Requests	Submit, manage, and approve requests, such as: • Changes to an organization • Creation or modification of security groups • Increasing spending limit on expenses You can also initiate requests on behalf of someone else if enabled by your administrator. SeeConcept: Requestsfor more information.
Schedule	View user's schedule.
Student	Access self-service tasks related to managing prospects and selecting courses.
Surveys	View details about active, closed, and scheduled surveys. Launch surveys you've saved as drafts.
Team	View team details and analytics.
Team Schedule	View and manage team schedules and monitor and take action on daily time exceptions, such as late check-ins, on the Attendance tab in the Team Schedule worklet (Manager view only).
Time Tracking	Enter time, check in or check out, and view schedules.
Worksheets	View workbooks and add comments.

Related Information
Concepts
Concept: Best Practices for Uploading Packaged Content on Mobile
Reference
Reference: Mobile Student Features
Workday Browser Support Policy
The Next Level: Mobile Functionality with Workday Learning
The Next Level: Nurture and Grow Your Talent with Mobile
The Next Level: All Things 2023R2 and R2+ on the Workday Mobile App
2024R2 What's New Post: Connected Experience: Daily Time Exceptions for Managers

Concept: Best Practices for Mobile Adoption

You can use these practices to simplify setup for mobile users and increase mobile adoption.

Help Users Download the Workday Mobile Application

Workday displays notices that increase awareness of the Workday mobile application and enable users to download it easily. These notices:

- Pop up on the Home page or mobile web banner when you sign in to Workday.
- Contain links to download the Workday mobile application from the App Store or Google Play.

You can disable these notices by selecting the Disable Mobile App Store Links check box on the Edit Tenant Setup - System task.

You can also provide these links to enable users to download the Workday mobile app from public stores:

Device Type	Link
Android	https://play.google.com/store/apps/details?id=com.workday.workdroidapp
iPad and iPhone	https://itunes.apple.com/app/workday/id316800034

Workday mobile apps update on a different schedule from Workday Business Services, so their version numbers might vary.

Help Users Connect to Your Tenant

Users who don't know how to set up the Workday mobile application can scan a QR code from their mobile device to connect to your tenant. Workday displays a unique QR code for your tenant when you click:

- The pop up on the Home page that displays when you sign in to Workday on desktop.
- Organization ID on the My Account menu on desktop, Android, iPad, and iPhone.

Users can sign into their account on desktop to scan the QR code or get it from a coworker who already has the Workday mobile application.

The QR code uses Google Firebase Dynamic Links to populate your tenant name and web address for the user. You can disable these links by selecting the Disable Automatic Tenant Configuration Links check box on the Edit Tenant Setup - System task.

You can also email users a link that automatically configures their Workday mobile application with your tenant information. Users must access the link from a mobile device. Use these formats for the links:

Device Type	Link Format
Android	https://myworkday.com/open-android//<web_address>/<tenant_name>
iPad and iPhone	workday+https://<web_address>/<tenant_name>

Enable Mobile Authentication

You can enable these authentication types to help users access Workday faster from a mobile device:

- Personal Identification Number (PIN).
- Biometric (on supported devices only).
    - Fingerprint authentication (Touch ID).
    - Face ID.

Related Information

Concepts

Concept: End User Adoption Dashboard on page 226

Tasks

Steps: Set Up Mobile Authentication on page 196

Reference

Reference: Workday Sign In URLs

Reference: Mobile Device Management on page 201

Workday 32 What's New Post: Mobile User Experience

The Next Level: Know Your Mobile App 101

The Next Level: Mobile Adoption Guide

Mobile Security and Authentication

Steps: Set Up Mobile Authentication

Prerequisites

- Review your existing configuration of authentication policies for the Workday desktop experience. See Concept: Authentication Policies.
- Security: *Set Up: Tenant Setup - Security* domain in the System functional area.

Context

You can set up mobile authentication so your mobile users can sign in to Workday on Android, iPad, and iPhone with these authentication options:

- Personal Identification Number (PIN).
- Biometric (on supported devices only).
  - Fingerprint authentication (Touch ID).
  - Face ID.

Steps

1. Access the Mobile Authentication section on the Edit Tenant Setup - Security task.

   Select these check boxes to enable mobile PIN and biometric authentication:

   - Enable Biometric Authentication.
   - Enable Mobile PIN Authentication.
2. (Optional) Create an authentication policy or edit your existing authentication policy to control which user groups can sign in with biometric authentication or a mobile PIN.

   On the Authentication Ruleset grid:

   - Select *Mobile PIN/Biometric* as an allowed authentication type on rules to enable security groups to use biometric authentication or a mobile PIN.
   - Remove *Mobile PIN/Biometric* as an allowed authentication type from rules to restrict security groups from using biometric authentication or a mobile PIN.

   If you enable mobile PIN or biometric authentication but don't create an authentication policy, all users can sign in with the authentication types you enabled.

   See Steps: Set Up Authentication Policies.

Result

When users sign in, Workday prompts them to authenticate with the methods you've enabled. Users can configure their preferred sign-in methods in the app settings.

If you enable biometric authentication, users with supported devices can authenticate with:

- A fingerprint on Android.

- Touch ID or Face ID on iPad or iPhone devices that have Touch ID or Face ID enabled.

Related Information

Tasks

Add Authentication Rules

Workday Mobile Authentication and Security FAQ

Reference

Reference: Edit Tenant Setup - Security on page 144

Steps: Set Up Microsoft Conditional Access Policy

Context

You can require mobile users to access Workday from devices that are compliant with a Conditional Access policy, requiring them to install Workday for Android, iPad, and iPhone through the Microsoft Intune Company Portal.

Steps

1. Access the Edit Tenant Setup - Security task.

   Select the Enable Mobile Browser SSO for Native Apps check box.

   Security: *Set Up: Tenant Setup - Security* domain in the System functional area.
2. Set up Azure Active Directory.

   See Tutorial: Azure Active Directory single sign-on (SSO) integration with Workday.
3. In Microsoft Intune, add Workday for Android as an Android Enterprise system app and Workday for iOS as an iOS Store app.

   See Add apps to Microsoft Intune.

   - Add *com.workday.workdroidapp* as the package name for Android.
   - Add *com.workday.workdayapp* as the package name for iOS.
4. Set up a Conditional Access policy.

   See Conditional Access: Require compliant or hybrid Azure AD joined device.

   When you grant access controls, don't enable approved client apps and app protection policies.
5. (iPad and iPhone only) In your device compliance policies, add *com.workday.workdayapp* to the list of restricted apps.

   See Device Compliance settings for iOS/iPadOS in Intune.

Next Steps

In Microsoft Intune, you can customize mobile device management settings with JSON values for Android and XML values for iPad and iPhone.

For configuration file examples, see Reference: Mobile Device Management on page 201.

Enable Single Sign-On (SSO) for Mobile

Prerequisites

- Set up Security Assertion Markup Language (SAML) authentication in the tenant.
- Security: *Set Up: Tenant Setup - Security* domain in the System functional area.

Context

You can enable your users to use SAML SSO to access Workday on their mobile devices. Users access Workday on mobile devices using:

- Workday mobile apps (Workday on iPad, iPhone, or Android).
- Mobile browsers.

You separately configure SAML SSO access using mobile apps and browsers by setting the:

- Mobile App Login Redirect URL. If you don't set this URL, Workday uses Workday-managed authentication for mobile app access.
- Mobile Browser Login Redirect URL. If you don't set this URL, Workday uses Workday-managed authentication for mobile browser access.

Steps

1. Set up the mobile app and mobile browser redirect URLs in Workday.

   If you use:

   - One SAML SSO configuration for all users in each environment, enter the redirect URLs in the Redirection URLs grid on the Edit Tenant Setup - Security task.
   - An authentication selector to provide more than 1 SAML SSO option to your users in each environment:

     a. Access the Manage Authentication Selectors report.
     b. Select the authentication selector and enter the redirect URLs on the task that follows.

   As you complete either task, consider:

Option	Description
Mobile App Login Redirect URL	The URL to redirect users to when they sign in to Workday on iPad, iPhone, or Android: • (IdP-initiated SAML) The sign-in page for your SAML provider. You obtain this URL from your SAML provider. • (SP-initiated SAML) `https://`*`<workdayhost>`*`/`*`<tenantname>`*`/login-saml2.htmld`.
Mobile Browser Login Redirect URL	The URL to redirect users to when they sign in to Workday on a mobile browser: • (IdP-initiated SAML) The sign-in page for your SAML provider. You obtain this URL from your SAML provider. • (SP-initiated SAML) `https://`*`<workdayhost>`*`/`*`<tenantname>`*`/login-saml2.htmld`.

2. (Optional) Access the Edit Tenant Setup - Security task.

   As you complete the task, consider:

Option	Description
Enable Mobile Browser SSO for Native Apps	Redirects users to a mobile browser to complete Single Sign-On (SSO) when they sign in to Workday on Android, iPad, and iPhone. After successful sign-in, Workday redirect users to the Workday app on their device.

Option	Description
	To enable hardware authentication such as YubiKey on mobile devices, you must select this option.
Enable Microsoft Edge for Login to Native Mobile Apps	Redirects users to the Microsoft Edge web browser to complete Single Sign-On (SSO) when they sign in to Workday on Android, iPad, and iPhone. After successful sign-in, Workday redirect users to the Workday app on their device.
Enable DOM Storage	Enables DOM (Document Object Model) storage for Single Sign-On (SSO) configurations that were configured to use DOM storage to work correctly. Depending on the configuration, DOM storage can optimize load times through client side storage.
Enable Certificate-Based SSO	Enables mobile devices using Workday on Android, iPad, and iPhone to use certificates instead of user name and password for SSO.
Enable Dynamic Certificate Pinning	Enables Workday mobile apps and browsers to make SSL connections only with SSO providers associated with the Trusted Domain Certificates.
Trusted Domain Certificates	One or more server certificates the mobile apps and browsers will trust. Click Create Trusted Domain Certificate and enter for each certificate: • Domain Name: The domain name of the SSO provider that is providing the certificate. • PEM Encoded Certificate: Include the certificate header and footer, including all of the dash (-) characters. Example: Everything including -----*BEGIN CERTIFICATE*----- and -----*END CERTIFICATE*-----. You get this information from your SSO provider.

Related Information
Tasks

Set Up Authentication Selectors

Reference

Reference: Edit Tenant Setup - Security on page 144

Concept: Mobile Authentication

Workday provides 2 separately configurable types of mobile authentication to enable users to access Workday quickly from a mobile device:

- Mobile PIN.

- Biometric.

You can set up mobile authentication on the Edit Tenant Setup – Security task. Your users can then use or skip the mobile authentication you set up when they sign in to Workday. After they sign in, they can make further mobile authentication changes in their settings.

Users might need to use their primary authentication type (Example: User Name Password or Single Sign-On (SSO)) in these situations:

- Before they create a mobile PIN.
- When they can't use mobile authentication. Example: When Workday requires them to set up a new PIN after too many failed PIN sign-in attempts.
- When they sign in to Workday using any other client.

You can run the Signons and Attempted Signons report to monitor and troubleshoot tenants that have mobile authentication enabled.

Note: Workday doesn't support passwordless sign-in, also known as web authentication, as a primary authentication type on the Workday mobile apps.

Mobile PIN Authentication

To use mobile PIN authentication to access their Workday account, users must create a PIN for:

- Each device.
- Each client on a single device.

They can specify the same PIN for each device or client.

Biometric Authentication

Workday automatically enables biometric authentication in your tenant. Biometric authentication enables users to access Workday using these authentication options on supported devices:

- Fingerprint authentication (Touch ID).
- Face ID.

To access their account, users can enable fingerprint authentication or Face ID for each device and for each client on a single device.

Workday supports fingerprint biometric only for authentication on Android devices for these manufacturers:

- Android devices 11.0 or later.
  - Google
  - HTC
  - Huawei Nexus 6P
  - LG
  - Motorola
  - Samsung
  - Sony
- iPad and iPhone devices iOS 17.0 or later.

Users with supported iPhone devices can also authenticate using Face ID.

Workday doesn't support any facial biometric authentication on any of the Android devices. These devices use Android's biometric API to verify the user's identity.

Authentication for the Desktop Experience

Mobile authentication is interdependent of the primary authentication policies used for the Workday desktop experience. Your authentication configuration for desktop will affect your mobile authentication. See Concept: Authentication Policies.

We recommend that you review your existing authentication rules, IP ranges, and access restrictions to understand how your authentication for the desktop experience will affect your mobile authentication.

Related Information

Tasks

Add Authentication Rules

Maintain IP Ranges

Create Access Restrictions

Reference

Workday Mobile Authentication and Security FAQ

Reference: Mobile Device Management

Use your Mobile Device Management (MDM) solution to manage the Workday mobile apps remotely by setting key value pairs that:

- Automatically populate tenant settings for the mobile apps to simplify setup for your users.
- Disable specific actions for Workday on Android, iPad, and iPhone.

Scenarios

Scenario	Key Value Pairs
Automatically populate the Tenant and Web Address fields for: • Workday on Android when you enable Android for Work profiles. • Workday on iPad and iPhone.	Use these values to configure your Tenant: • Configuration Key = *UserGroupCode* • Value Type = *String* • Configuration Value = Your tenant name. Example: gms Use these values to configure your Web Address: • Configuration Key = *AppServiceHost* • Value Type = *String* • Configuration Value = The base URL for your tenant. Example: https://www.myworkday.com
Disable these actions for Workday on iPad and iPhone: • Cut, Copy, and Paste • Print	Set the value (boolean) to *False* on these keys to disable the functionality: • *AllowCutCopyPaste* • *AllowPrint*
Disable screenshots for Workday on Android.	Set the value (boolean) to *False* on the *AllowScreenshots* key to disable functionality.
Disable suggested updates for your users.	Set the value (boolean) to *False* on the *AllowSuggestedUpdates* key to disable functionality.
Customize the app store URL to direct mobile users to the app store of your choice.	Use these values to change the app store URL: • Configuration Key = *AppUpdateURL* • Value Type = *String* • Configuration Value = App store URL

Examples

The code examples display Android JSON and iOS XML files in need of configuration. Depending on the scenario that mobile device administrators want to implement, they replace:

- The `STRING_VALUE` with the appropriate Configuration Value.
- The boolean value with `true` or `false`.

Android JSON File

```
{
    “kind”:
 “androidenterprise#managedConfiguration”,
    “productId”:
 “app:com.workday.workdroidapp”,
     “managedProperty”: [
         {
             “key”: “UserGroupCode”,
             “valueString”:
 STRING_VALUE
         },
         {
             “key”:
 “AppServiceHost”,
             “valueString”:
 STRING_VALUE
         },
         {
             “key”:
 “AllowSuggestedUpdates”,
             “valueBool”: true|false
         },
         {
             “key”: “AppUpdateURL”,
             “valueString”:
 STRING_VALUE
         },
         {
             “key”:
 “AllowCutCopyPaste”,
             “valueBool”: true|false
         },
         {
             “key”: “AllowPrint”,
             “valueBool”: true|false
         },
         {
             “key”:
 “AllowScreenshots”,
             “valueBool”: true|false
         },
   ]
}
```

iOS XML File

```
<dict>
 <key>UserGroupCode</key>
   <string>STRING_VALUE</string>
 <key>AppServiceHost</key>
   <string>STRING_VALUE</string>
 <key>AllowCutCopyPaste</key>
   <true /> or <false />
 <key>AllowPrint</key>
   <true /> or <false />
 <key>AllowSuggestedUpdates</key>
```

```
    <true /> or <false />
  <key>AllowSuggestedUpdates</key>
    <string>STRING_VALUE</string>
</dict>
```

Related Information

Reference

Workday Mobile Authentication and Security FAQ

Example: Mobile PIN Authentication

This example illustrates 1 way to configure an authentication policy that enables the use of a Personal Identification Number (PIN) on mobile devices.

Context

Your organization uses a SAML Single Sign-On (SSO) solution. You want to enable workers to access Workday self-service tasks using a PIN to sign in on their mobile devices, however. You want to set the Mobile PIN with strict requirements:

- PIN length from 6 to 8 digits.
- Only 2 failed attempts before Workday resets the PIN.
- PIN expires after 30 days.

Prerequisites

You must have security administrator privileges.

Steps

1. Access the Edit Tenant Setup - Security task.
2. In the Mobile Authentication section, select the Enable Mobile PIN Authentication check box and enter these values:

Option	Description
PIN Min Length	6
PIN Max Length	8
PIN Max Failed Signin Attempts	2
Max Mobile Authentication Age (in days)	30

3. Click OK and Done.
4. Access the Manage Authentication Policies report.
5. Create a new authentication policy or edit an existing one.
6. In the Authentication Ruleset grid, add this rule:

Option	Description
Authentication Rule Name	Worker Self-Service on Mobile Rule
Security Group	*All Employees* *All Contingent Workers*
Authentication Condition	*Any*
Allowed Authentication Types	*Mobile PIN* *SAML*

Option	Description
Access Restriction for Authentication Condition	*Self-Service* If you haven't defined access restrictions, select Create Access Restriction. Enter *Self-Service* in the Name field and select these values for Allows Access to Security Groups: • *Employee As Self* • *Contingent Worker As Self*

7. Click OK.
8. On the Default Rule for All Users grid, check the Disabled check box.
9. Click OK and Done.
10. Access the Activate All Pending Authentication Policy Changes task to activate and confirm the changes.
11. Notify your workers that they must sign in using their SAML SSO credentials before they set up their PIN.

    A worker needs to set up a new PIN to sign in with their SAML SSO credentials if Workday resets the PIN due to:

    - Too many failed sign-in attempts.
    - An expired PIN.

Result

All workers can perform self-service tasks from their mobile devices, using their PIN to sign in.

Related Information

Tasks

Add Authentication Rules

Create Access Restrictions

Steps: Set Up Mobile Authentication on page 196

Tasks in Workday Mobile

Reference: Absence Management Features in Workday Mobile

Compare the Absence Management features that are available in the Workday mobile application and Workday on desktop.

Note: You can run the List Tasks Available on Mobile report to detail all tasks and business processes supported in the Workday mobile application.

Absence Management

Workday Absence Management enables you to track your workforce’s time away from work. Workers can request short-term time off, long-term leave of absence, and manage team requests.

Employees can use the Workday mobile application to:

- Request short-term time off or long-term leave of absence.
- Check absence balances by type.
- View request history.
- Edit approved or pending requests.
- Delete individual days for approved requests.
- Undo submitted changes.

- View manager feedback on a request (using My Tasks and Notifications).

Manager and reviewers can use the Workday mobile application to:

- Review employee requests and corrections.
- Approve or deny requests and provide reasons.
- Revise requests.

Feature	Available on Mobile Application	Available on Desktop
Buy Time Off	Yes	Yes
Close Absence Case	Yes	Yes
Delegate Time Off Approval	Available on Mobile Browser	Yes
Delete Pending or Approved Time Off Requests	Yes	Yes
Edit Time Off Requests	Yes	Yes
Request Leave of Absence	Yes	Yes
Request Return from Leave of Absence	Available on Mobile Browser	Yes
Request Time Off	Yes	Yes
Review Leave of Absence	Yes	Yes
Review My Time Off Requests	Yes	Yes
Review Time Off Correction	Yes	Yes
Revise Leave of Absence	Yes	Yes
Revise Return from Leave of Absence	Available on Mobile Browser	Yes
Revise Time Off Correction	Yes	Yes
Sell Time Off	Yes	Yes
Transfer Time Off Balances	Available on Mobile Browser	Yes
View Balances by Time Off Type	Yes	Yes
View Team Absence Calendar	Available on Mobile Browser	Yes
View Time Off Results by Period Report	Available on Mobile Browser	Yes

Reference: Learning Features in Workday Mobile

Compare the Learning features that are available in the Workday mobile application and Workday on desktop.

Note: You can run the List Tasks Available on Mobile report to detail all tasks and business processes supported in the Workday mobile application.

Learning

Workday Learning supports organizations in training and developing their workforce. Workday supports a variety of learning content on mobile, including but not limited to video, packaged third-party content, and user-generated content.

Employees can use the Workday mobile application to:

- Browse learning content.
- Enroll in learning content.
- Complete learning content.

Managers can use the Workday mobile application to:

- Create learning content.
- View learning reports.

Feature	Available on Mobile Application	Available on Desktop
Browse Learning Content	Yes	Yes
Enroll in Course	Yes	Yes
Enroll Team in Course	Yes	Yes
Complete Learning Content	Yes	Yes
View Course Progress	Yes	Yes
View Learning History/Transcript	Yes	Yes
Drop Learning Enrollments	Yes	Yes
Manage Learning Preferences	Yes	Yes
Create Learning Paths	Yes	Yes
Learning Notifications and Alerts	Yes	Yes
View Learning Reports	Yes	Yes
Create Library	Yes	Yes
Save Learning Course	Yes	Yes
Create Lesson	Yes	Yes
Edit Lessons	Available on Mobile Browser	Yes
Create Course	Available on Mobile Browser	Yes
Create Survey	Available on Mobile Browser	Yes
Create Program	Available on Mobile Browser	Yes
Manage Learning Campaigns	Available on Mobile Browser	Yes
Manage Topics	Available on Mobile Browser	Yes
Share Learning Course	Available on Mobile Browser	Yes

Reference: Performance and Talent Optimization Features in Workday Mobile

Compare the Performance and Talent Optimization features that are available in the Workday mobile application and Workday on desktop.

Note: You can run the List Tasks Available on Mobile report to detail all tasks and business processes supported in the Workday mobile application.

Performance and Talent Optimization

Workday's Performance Optimization enables you to optimize your global workforce and your workers' career growth and skills. It supports talent mobility by connecting your workforce with internal opportunities matched to their skills, experience, and interests. It also guides and enables workers to explore potential opportunities.

Performance and Talent Optimization products include:

- Performance (available through Profile).
- Skills (available through Profile).
- Career (available through Profile).
- Career Hub (available through the worklet on the mobile application menu).

Employees can use the Workday mobile application to:

- Manage goals, skills, and interests.
- View professional development opportunities.
- Give and receive feedback.
- Explore learning courses.

Managers can use the Workday mobile application to:

- Give and manage feedback.
- Complete performance reviews and evaluations.
- Assess potential.

Feature	Available on Mobile Application	Available on Desktop
View my Individual/Worker Goals	Yes	Yes
Add Individual Goals	Yes	Yes
Archive Individual Goals	Available on Mobile Browser	Yes
View Competencies	Yes	Yes
Edit Competencies	Available on Mobile Browser	Yes
View Performance Reviews	Yes	Yes
Start Performance Reviews	Yes	Yes
Get/Request Feedback	Yes	Yes
View Feedback	Yes	Yes
Give Feedback	Yes	Yes
Revise Feedback	Yes	Yes
Assess Potential	Yes	Yes
View Education	Yes	Yes
View Achievements	Yes	Yes
View Development Plan	Yes	Yes
Start Development Plan	Yes	Yes
View Worker Projects	Yes	Yes
Calibrate Team	Available on Mobile Browser	Yes
Start Performance Improvement Plans	Available on Mobile Browser	Yes
View and Manage Skills	Yes (through Main Profile)	Yes

Feature	Available on Mobile Application	Available on Desktop
View Mentorship	Available on Mobile Browser	Yes
Manage Mentorships	Available on Mobile Browser	Yes

Reference: Time Tracking and Scheduling Features in Workday Mobile

Compare the Time Tracking and Scheduling features that are available in the Workday mobile application and Workday on desktop.

Note: You can run the List Tasks Available on Mobile report to detail all tasks and business processes supported in the Workday mobile application.

Time Tracking and Scheduling

Workday Time Tracking and Workday Scheduling support organizations in managing and tracking worker time.

Employees can use the Workday mobile application to:

- Check in and out.
- Edit check-in and check-out times.
- Enter and submit time.
- View their schedules and time totals.

Managers can use the Workday mobile application to:

- Access employee work schedule calendars.
- Approve time for their workers.
- Monitor and take action on daily time exceptions, such as late check-ins, on the Attendance tab in the Team Schedule worklet.

Timekeeping administrators can use the Workday mobile application to:

- Enforce geofencing for worker check-in.
- Ensure that workers can only check in at the location where they're scheduled to work.
- Ensure that workers can only check in when they're scheduled to work.
- Prevent workers from checking in early.

Feature	Available on Mobile Application	Available on Desktop
Approve Time for Worker	Yes	Yes
Autofill from Prior Week	Yes	Yes
Check In	Yes	Yes
Check Out	Yes	Yes
Daily Time Exceptions	Yes	No
Enter Time	Yes	Yes
Flexible Check-In and Check-Out	Yes	Yes
Geofencing	Yes	Yes
My Schedule (Work Schedule Calendar)	Yes	Yes
Prevent Early Check-In	Yes	Yes

Feature	Available on Mobile Application	Available on Desktop
Shift-Based Check-In	Yes	Yes
Submit Time	Yes	Yes

Related Information

Examples

2024R2 Feature Release Note: Connected Experience: Daily Time Exceptions for Managers

2024R1 What's New Post: Connected Experience: Daily Time Exceptions for Managers

Workday Adoption and Usage

Adoption Planning Hub

Setup Considerations: Adoption Planning Hub

You can use this topic to help make decisions when planning your configuration and use of key Adoption Planning Hub features. It explains:

- Why to set them up.
- How they fit into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

The Adoption Planning Hub enables you to manage the evaluation and uptake of new features and enhancements. The Adoption Planning Hub consists of an overview page, cards, and tasks that you can use to manage your overall adoption workflow.

For information about the previous version, see Setup Considerations: Adoption Planning on page 218.

Business Benefits

Use the Adoption Planning Hub to:

- Assign adoption items to team members for uptake.
- Create and prioritize adoption items.
- Discover recommended AI features relevant to your tenant.
- Follow retiring feature updates.
- Track adoption progress using roadmap and backlog visualizations.

Use Cases

- When Workday adds Benefits enhancements to your Preview tenant, identify release notes related to the enhancements using the Create from What's New task and add them to an adoption item. Then, add the adoption item to your roadmap and send it to your Benefits team for evaluation before implementing the enhancement.
- You need to evaluate recent Workday updates for Benefits that are already in Production. Use the What's New in Last 6 Months visualization to find any enhancements. Then, add these release notes to an adoption item, add it to your backlog, and assign it to your Benefits team for evaluation.

- You need to evaluate a new productivity tool. Use the Create Adoption Item task to create an adoption item for this new project. Then, add the adoption item to your roadmap and send it to your IT team for further evaluation.
- Your team has been tracking your adoption workflow in a spreadsheet. Use the Get Adoption Items and Put Adoption Items integrations to import your spreadsheet data into the Adoption Planning Hub.

Questions to Consider

Questions	Considerations
How does adoption fit into your overall work schedule?	The Adoption Planning Hub enables you to create adoption items for your entire work schedule, including non-Workday projects such as change requests and feature uptake opportunities.
How do you want to manage your adoption workflow?	Consider which features require immediate attention and which aren't as critical. You can add features to your Adoption Backlog and Adoption Roadmap to manage your adoption workflow.
How do you want to track new features for implementation?	Consider which labels and functionality will help you best track new features for implementation. When you create an adoption item, you can add: • Attachments. • Notes. • Priorities. • Statuses.

Recommendations

- Add custom reports to the Adoption Planning Hub to suit your custom reporting needs. See Add Custom Reports to Adoption Planning Hub on page 213.
- Create adoption item statuses and types to fit the needs of your organization. See Concept: Adoption Planning Hub Customization on page 216.
- Have your team provide implementation feedback by using the Priority prompts on these tasks:
    - Create Adoption Item.
    - Create from What’s New.

Requirements

No impact.

Limitations

- Adoption Planning Hub is available in your Preview tenant and can be enabled in your Production tenant prior to general availability in 2026R1. See Steps: Set Up Adoption Planning Hub on page 212. Enabling the Adoption Planning Hub replaces the previous Adoption Planning feature.
- Adoption Planning Hub domains are unconstrained; you can't restrict access to specific functional areas on reports and tasks.

Tenant Setup

No impact.

Security

Domain	Considerations
Adoption Planning domain in the Adoption functional area.	Enables access to these reports: • Adoption Backlog • Adoption Planning • Adoption Recommendations • Adoption Roadmap • Retiring Features
Set Up: Adoption domain in the Adoption functional area.	Enables access to these tasks: • Maintain Adoption Customer Releases • Maintain Adoption Item Priorities • Maintain Adoption Item Statuses • Maintain Adoption Item Types
Workday What's New domain in the System functional area.	Enables access to view the What's New in Workday report and edit other Adoption Planning Hub functionality associated with the What's New in Workday report. Workday recommends adding all admins and teams who need access to the Adoption Planning Hub to this domain. We recommend admins have Modify access.

Business Processes

No impact.

Reporting

Reporting Items	Considerations
Adoption Backlog	View all adoption items assigned to your backlog and make bulk edits.
Adoption Planning	Manage and monitor your overall adoption workflow in the Adoption Planning Hub. You can customize the layout of the Adoption Planning Hub Overview using the Maintain Hubs report.
Adoption Recommendations	View recommended AI features relevant to your tenant.
Adoption Roadmap	View all adoption items assigned to your roadmap and make bulk edits.
All Adoption Items Assigned to Logged in User	View your adoption items by status, including *Completed* adoption items.
Retiring Features	View upcoming feature retirements relevant to your tenant.

Integrations

You can use these web services to migrate adoption items into and out of Workday.

Web Service	Description
Get Adoption Items	Retrieve adoption items.
Put Adoption Items	Add adoption items.

See Reference: Common Workday Web Service Operation Types.

Related Information
Concepts
Concept: Adoption Recommendations on page 216
Concept: Adoption Planning Hub Customization on page 216

Steps: Set Up Adoption Planning Hub

Prerequisites

Security: *Set Up: System* domain in the System functional area.

Context

You can gain early access to the Adoption Planning Hub in your Production tenant prior to general availability in 2026R1.

Note: Enabling the Adoption Planning Hub replaces the previous Adoption Planning feature.

Existing adoption items persist in the Adoption Planning Hub. However, for custom configurations, you may need to reconfigure:

- Custom reports. See Add Custom Reports to Adoption Planning Hub.
- Custom statuses, using the Maintain Adoption Item Statuses task.

Steps

1. Access the Maintain Feature Opt-Ins report.
2. Click Opt In to the Feature for the Adoption Planning Redesign feature.
3. ../../../../authentication-and-security/configurable-security/security-policies/dan1370797389950.dita

   Configure the *Workday What's New* domain in the System functional area and these domains in the Adoption functional area:

   - *Adoption Planning*
   - *Set Up: Adoption*
4. In the Report/Task Permissions grid, select the View and Modify check boxes for your security groups.
5. ../../../../authentication-and-security/authentication/authentication-policies/dan1370796466492.dita.

Result

The Adoption Planning Hub is now enabled in your Production tenant. The previous Adoption Planning feature is disabled.

Next Steps

Create Adoption Items in Adoption Planning Hub on page 214 or Create Adoption Items from What's New in Workday Report on page 213.

Add Custom Reports to Adoption Planning Hub

Prerequisites

Security:

- *Adoption Planning* domain in the Adoption functional area.
- *Set Up: Tenant Setup - Hub* domain in the System functional area.

Context

You can add custom reports to the Adoption Planning Hub for your custom reporting needs. For example, you can add a custom report to the Adoption Planning Hub to track feature implementation across functional areas.

Steps

1. Access the Maintain Hubs report.
2. From the Adoption Planning row, select Action > Customize Hub Navigation.
3. Click Edit.
4. From the Configure Hub Navigation prompt, select the Configurable option.
5. Add a new row to the grid.
6. From the Navigation Item prompt on the new row, select Create > Create Navigation Item.
7. From the Create Navigation Item Action prompt, enter your custom report in the Report field.
8. Click OK.

Result

Workday adds your custom report to the Adoption Planning Hub. You can view it as a new link in the navigation panel.

Create Adoption Items from What's New in Workday Report

Prerequisites

Security:

- *Adoption Planning* domain in the Adoption functional area.
- *Workday What's New* domain in the System functional area.

Context

You can create adoption items from release notes in the What's New in Workday report to plan and track your team's uptake of new features and enhancements in the Adoption Planning Hub. You can use these items to plan short-term or long-term feature adoption.

Steps

1. Access the Adoption Planning report.
2. Click Create from What's New.
3. (Optional) To display all release notes including those already linked to adoption items, clear the Exclude Items with Linked Adoption Items check box.
4. Select release notes that you want to link to adoption items.
5. Click Create Individual Item(s).

6. As you complete the Details and Planning tab, consider:

Option	Description
Status	Statuses identify workflows for deployment. To add items to your backlog, assign 1 of these statuses: • *In Backlog* • *In Review* • *Prioritized* To add items to your roadmap, assign 1 of these statuses: • *Deferred* • *On Roadmap* Using the Maintain Adoption Item Statuses task, you can: • Create your own custom statuses. • Configure how adoption items are displayed in Adoption Planning based on status.
Assigned To	When adding an adoption item to your roadmap, select an assignee for the adoption item. If you don't select an assignee, Workday assigns the adoption item to you.

7. Click Create Adoption Item(s).

Result

Workday creates the adoption items and links them to the selected release notes.

Next Steps

You can view your adoption items by clicking Adoption Backlog or Adoption Roadmap on the Adoption Planning report.

To archive adoption items, assign 1 of these statuses:

- *Completed*
- *Duplicate*
- *Will Not Do*

You can access archived adoption items using the All Adoption Items task.

Related Information
Examples
Example: Create Roadmap Adoption Item for Multiple Features on page 217

Create Adoption Items in Adoption Planning Hub

Prerequisites

Security: *Adoption Planning* domain in the Adoption functional area.

Context

You can create adoption items from your company's overall assessment of feature adoption opportunities to plan and track your team's progress using the Adoption Planning Hub. You can use these items to plan short-term or long-term feature adoption.

Steps

1. Access the Create Adoption Item task.
2. As you complete the task, consider:

Option	Description
Status	Statuses identify workflows for deployment. To add items to your backlog, assign 1 of these statuses: • *In Backlog* • *In Review* • *Prioritized* To add items to your roadmap, assign 1 of these statuses: • *Deferred* • *On Roadmap* Using the Maintain Adoption Item Statuses task, you can: • Create your own custom statuses. • Configure how adoption items are displayed in Adoption Planning based on status.
Type	Select a type to categorize the adoption item. Example: Select *New Feature* to represent a feature that you want to implement.

3. Click OK and Done.

Result

Workday creates the adoption items and adds them to either your backlog or roadmap, based on the status you selected.

Next Steps

You can view your adoption items by clicking Adoption Backlog or Adoption Roadmap on the Adoption Planning report.

To archive adoption items, assign 1 of these statuses:

- *Completed*
- *Duplicate*
- *Will Not Do*

You can access archived adoption items using the All Adoption Items task.

Concept: Adoption Recommendations

The Adoption Recommendations report enables you to more efficiently discover and adopt new Workday features by highlighting features relevant to your tenant.

The report displays recommended AI features for these product areas:

- Accounts Payable
- Core Payroll
- Expenses
- Time Tracking
- Workday Assistant

Workday plans to include recommendations for other product areas in a future update. The report may appear blank if your organization is not entitled to AI features in the supported product areas.

You can create adoption items from recommended features by clicking View Details > Create Adoption Item. Features linked to an adoption item will not display in the Adoption Recommendations report.

Related Information
Concepts
Setup Considerations: Adoption Planning Hub on page 209

Concept: Adoption Planning Hub Customization

Priorities and Statuses

Create detailed adoption plans by adding priorities and statuses to adoption items. These labels help you categorize and organize your adoption items. You can manage these details when you create and edit adoption items.

Field	Description
Priority	Prioritize adoption items based on details like *Value* and *Business Risk*.
Status	Statuses identify work flows for deployment. To add items to your backlog, assign 1 of these statuses: • *In Backlog* • *In Review* • *Prioritized* To add items to your roadmap, assign 1 of these statuses: • *On Roadmap* • *Deferred* To archive adoption items, assign 1 of these statuses: • *Completed* • *Duplicate* • *Will Not Do* You can access archived adoption items using the All Adoption Items task.

Customize Adoption Item Details

Use these tasks to create labels for adoption items:

- Maintain Adoption Customer Releases
- Maintain Adoption Priorities
- Maintain Adoption Statuses
- Maintain Adoption Types

You can also use the Maintain Custom Labels task and select *Adoption Items* to create custom labels of date ranges for planning needs unique to your business.

Customize Adoption Planning Hub

You can customize the layout of the Adoption Planning Hub Overview using the Maintain Hubs report. See Customize Hub Navigation on page 319.

You can also add custom reports to the Adoption Planning Hub. See Add Custom Reports to Adoption Planning Hub on page 213.

Related Information
Concepts
Setup Considerations: Adoption Planning Hub on page 209

Example: Create Roadmap Adoption Item for Multiple Features

This example illustrates how to create a single adoption item for your roadmap from multiple features on the What's New in Workday report.

Context

You're an HR Administrator with 6 months of new benefits features on the What's New in Workday report that you need to adopt. You want to:

- Group related benefits features into a single adoption item.
- Add the adoption item to your roadmap.
- Assign the adoption item to a manager.
- Set a deadline of January 31, 2026 for adoption.

Prerequisites

Security:

- *Adoption Planning* domain in the Adoption functional area.
- *Workday What's New* domain in the System functional area.

Steps

1. Access the Adoption Planning report.
2. Click Create from What's New.
3. Enter these values for the filter options:

Option	Description
From Date	*2025-03-14*
To Date	*2025-09-12*
Functional Area	*Benefits*
Exclude Items with Linked Adoption Items	Select the check box.

4. Click OK.
5. From the Setup Effort column, select Filter and enter:

Option	Description
Filter Condition	*is*
Value	*Setup Required*

6. Click Filter.
7. Select all filtered release notes.
8. Click Create Item for Group.
9. As you complete the Create from What's New task, enter:

Option	Description
Name	*Benefits*
Status	*On Roadmap*

10. In the Details and Planning tab, enter:

Option	Description
Type	*New Feature*
Functional Area	*Benefits*
Assigned To	*Logan McNeil*
Planned Start Date	*2025-12-01*
Planned End Date	*2026-01-31*

11. On the Priority tab, from the Priority prompt, select *High*.
12. On the Feature Details tab, from the Setup Effort prompt, select *Setup Required*.
13. Click OK and Done.

Result

Workday creates a single Benefits adoption item that groups the selected release notes and adds it to your Adoption Roadmap.

Next Steps

Access the Adoption Roadmap Timeline visualization on the Adoption Planning report to view your Benefits adoption item.

Related Information
Tasks
Create Adoption Items from What's New in Workday Report on page 213

Workday Adoption

Setup Considerations: Adoption Planning

Note: We plan to retire this version of Adoption Planning in 2026R1. Workday recommends that you enable the Adoption Planning Hub in your Production tenant ahead of this retirement. See Setup Considerations: Adoption Planning Hub on page 209.

You can use this topic to help make decisions when planning your configuration and use of Adoption Planning. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Adoption Planning enables you to manage the evaluation and uptake of new features and enhancements detailed on the What's New in Workday report. Adoption Planning consists of a dashboard, tasks, and reports that you can configure to manage your overall adoption workflow.

Business Benefits

Adoption Planning enables you to:

- Manage your adoption process within Workday.
- Create, prioritize, and categorize adoption items to help you better manage the uptake of new features and enhancements.
- Assign adoption items for testing and implementation.
- Create a roadmap timeline to track deadlines for feature implementation by your teams.
- Collaborate more efficiently with your teams on adoption.
- View upcoming feature retirements.

Use Cases

When Workday adds Benefits enhancements to your Preview tenant, you can create a Benefits adoption item. Next, you can add relevant rows from the What's New in Workday report to that adoption item. Then, you can send that adoption item to your Benefits team for testing before the enhancements move into your Production tenant.

You need to evaluate recent Workday updates for Benefits that are already in Production. You can use the What's New in Last 6 Months report to find any new enhancements. You can then add these What's New items to an adoption item and assign it to your Benefits team for evaluation.

Questions to Consider

Questions	Considerations
How do you want to track new features to implement?	When you create an adoption item, you can add statuses, priority evaluations, notes, attachments, and more. Consider which labels and functionality will help you best track features.
How do you want to manage your adoption workflow?	Consider how you want to manage features that require immediate attention and enhancements that aren't as critical. When you create an adoption item, Workday provides several statuses you can add to the adoption item including *On Roadmap* and *In Backlog*. You can then use the Maintain Adoption Backlog and Maintain Adoption Roadmap tasks to help manage your adoption process.
How does adoption fit into your overall work schedule?	Adoption Planning enables you to create adoption items for your non-Workday projects, including

Questions	Considerations
	work events, conferences, and more. You can then view these items alongside your Workday adoption items on a Gantt chart using the View Adoption Roadmap Timeline task.

Recommendations

- To accommodate your personal workflow, add tabs and custom worklets to the Adoption Planning dashboard. See Concept: Adoption Planning Dashboard.
- Create custom adoption items, statuses, and more to fit the needs of your organization.
- Have your teams use the Priority Evaluation prompts on the Edit Adoption Items task to provide implementation feedback.

Requirements

Access to the *Workday What's New* security domain to view the What's New in Workday report and other reporting items.

Limitations

The Adoption Planning domains are unconstrained; therefore, you can't restrict access to specific functional areas on reports and tasks.

Tenant Setup

No impact.

Security

Domain	Considerations
Adoption Planning domain in the Adoption functional area.	Enables access to the tasks and reports that you use for Adoption Planning. Workday recommends adding all admins and teams to this domain who need access to Adoption Planning.
Dashboard: Adoption Planning in the Adoption functional area.	Enables access to the Adoption Planning dashboard.
Reports: Adoption Planning in the Adoption functional area.	Enables access these reports and report data sources (RDS): • All Adoption Items RDS. • All Adoption Items (Historical) RDS. • My Assigned Adoption Items report. • View All Adoption Items report.
Set Up: Adoption in the Adoption functional area.	Enables admins to customize Adoption Planning to fit the needs of your organization.

Business Processes

No impact.

Reporting

Reporting Items	Considerations
All Adoption Items All Adoption Items (Historical)	Use these RDSs to create custom reports for your executives.
My Assigned Adoption Items	Your teams can use this report to view the adoption items assigned to them.
Retiring Features	View retirements relevant to your tenant. You can add this worklet on the Adoption Planning dashboard.
View All Adoption Items	View adoption items, regardless of their status, based on the criteria you select.
What's New in Last 7 Days What's New in Last 6 Months	View a narrow snapshot of the What's New in Workday report, making it easier to view and locate updates. You can add these worklets on the Adoption Planning dashboard.

Integrations

You can use these web services to migrate adoption items into and out of Workday:

Web Service	Description
Get Adoption Items	This operation retrieves adoption items.
Put Adoption Items	This operation adds an adoption item.

See Reference: Common Workday Web Service Operation Types.

Related Information
Concepts
Concept: Feature Adoption on page 224
Concept: Adoption Planning Dashboard on page 225
Reference
Community: Adoption Planning
Concept: What's New in Workday Report

Steps: Set Up Adoption Security and Dashboards

Prerequisites

Note: We plan to retire this version of Adoption Planning in 2026R1. Workday recommends that you enable the Adoption Planning Hub in your Production tenant ahead of this retirement. See Setup Considerations: Adoption Planning Hub on page 209.

Review setup considerations for Adoption Planning.

Authorize access to:

- What's New reports in the *Workday What's New* security domain.
- Workday usage metrics in the *Workday Usage Metrics* security domain.

Context

Workday Adoption provides worklets and dashboards that enable you to analyze and manage your Workday implementation. You can configure the adoption dashboards with reports and tasks to enable your administrators and implementers with tools to manage their workflows.

You can use the:

- Adoption Planning dashboard to manage the adoption of features on the What's New in Workday report.
- Onboarding dashboards to consolidate the tasks and processes you use for Onboarding. These dashboards include:
  - Configure Business Processes for Onboarding
  - Configure Security for Onboarding Parent Processes
  - Configure Parent Processes for Onboarding
- End User Adoption Dashboard to view trends in business process and mobile-related activities based on Workday usage metrics.

Steps

1. Access the Maintain Functional Areas task.

   Select the Enabled check box for the Adoption functional area.

   Security: *Security Configuration* in the System functional area.
2. Activate Pending Security Policy Changes.
3. Access the Domain Security Policies for Functional Area report.

   Select *Adoption* from the Functional Area prompt.

   Security: *Security Configuration* and *Security Activation* in the System functional area.
4. From the related actions menu of the Domain Security Policy for each adoption domain tab, select Domain Security Policy > Enable.
5. From the related actions menu of the Domain Security Policy for each adoption domain tab, select Domain Security Policy > Edit Permissions.

   For each security domain, add security groups and grant permissions that best fit your organization.
6. Activate Pending Security Policy Changes.
7. Access the Maintain Dashboards report.

   For each adoption dashboard, select Edit to grant permissions and add worklets and tasks that best fit your organization.

   Security: *Set Up: Tenant Setup - Worklets* in the System functional area.

Result

Authorized users can add the adoption worklets to their home page and then access available adoption dashboards.

Related Information

Concepts

Concept: Adoption Planning Dashboard on page 225

Concept: Adoption Navigator: Onboarding Dashboard

Concept: End User Adoption Dashboard on page 226

Tasks

Steps: Set Up Workday Usage Metrics on page 230

Add Dashboard Menus on page 311

Set Up Worklets on page 315

Create Adoption Items

Prerequisites

Note: We plan to retire this version of Adoption Planning in 2026R1. Workday recommends that you enable the Adoption Planning Hub in your Production tenant ahead of this retirement. See Setup Considerations: Adoption Planning Hub on page 209.

Security: *Adoption Planning* domain in the Adoption functional area.

Context

You can create adoption items to plan short-term or long-term feature adoption. Create adoption items from content on the Adoption Planning dashboard to track and represent deployment information as it relates to your business.

Steps

1. Access the Create Adoption Item task.
2. As you complete the task, consider:

Field	Considerations
Type	Select a type to categorize the adoption item. Example: Select *New Feature* to represent a What's New item you want to implement.
Priority Evaluation	Prioritize your adoption items with labels that reflect their importance. You can also create custom Priority labels to meet the needs of your organization.
Status	The status you set on an adoption item determines where it displays. Example: Select *In Backlog* to move an item to the backlog and manage it on the Maintain Adoption Backlog task.
Inactive	Select the Inactive check box to deactivate an item so that it doesn't display on the backlog.
Custom Dates and Releases	Use the Custom Date 1 and Custom Date 2 fields to create a unique time frame for deployment. Connect your deployment to a release unique to your business by: • Accessing the Maintain Adoption Customer Releases task. • Using the Customer Release field in the Roadmap section of the task.
What's New Reference	Use this prompt to create links between your adoption item and release notes published in the What's New in Workday report.

3. (Optional) Access the What's New Item Actions task to create a large quantity of adoption items for features documented in the What's New in Workday report.

Next Steps

Run the View All Adoption Items report to view your adoption items.

Organize your adoption items by placing them on a roadmap or a backlog using the Maintain Adoption Backlog or Maintain Adoption Roadmap tasks. See Concept: Feature Adoption.

Concept: Feature Adoption

Note: We plan to retire this version of Adoption Planning in 2026R1. Workday recommends that you enable the Adoption Planning Hub in your Production tenant ahead of this retirement. See Setup Considerations: Adoption Planning Hub on page 209.

Use the Adoption Planning dashboard to inform which adoption items you want to create:

- High-priority roadmap plans.
- Low-priority backlogs.

Create flexible and detailed plans for implementation that display on the Adoption Planning dashboard, including:

- Events such as Workday Rising presentations.
- New feature information from reports such as What's New in the Last 7 Days.
- Service Update Notes linked in the Supplementing What's New report.
- Your company events as they relate to Workday releases and events.

Create and edit adoption items with these tasks:

- Create Adoption Item
- Edit Adoption Item

Edit and manage multiple adoption items with these tasks:

- Maintain Adoption Backlog
- Maintain Adoption Roadmap

Priorities and Statuses

Create detailed adoption plans by adding priorities and statuses to adoption items. These labels help you categorize and organize your adoption items. You can manage these details when you create and edit adoption items.

Field	Description
Priority	Prioritize adoption items based on details like *Value* and *Business Risk*.
Status	Statuses identify work flows for deployment. To add items to your backlog, assign these statuses: • *In Backlog* • *In Review* • *Prioritized* To add items to your roadmap, assign these statuses: • *On Roadmap* • *Deferred* Note: Assigning 1 of these statuses archives your adoption item:

Field	Description
	• *Completed* • *Duplicate* • *Will Not Do* Archiving an adoption item makes it inaccessible from the Adoption Planning dashboard. You must opt-in to the Adoption Planning Hub to view your archived adoption items. See Steps: Set Up Adoption Planning Hub on page 212.

Customize Adoption Item Details

Use these tasks to create labels for adoption items:

- Maintain Adoption Priorities
- Maintain Adoption Statuses
- Maintain Adoption Types

You can also use the Maintain Custom Labels task and select*Adoption Items* to create custom labels of date ranges for planning needs unique to your business.

Organize and Edit Adoption Items

Use the Maintain Adoption Backlog or Maintain Adoption Roadmap tasks to organize adoption items based on when you want to deploy them. Example: Use the backlog to track lower priority adoption items and the roadmap to surface adoption items requiring immediate or upcoming action. To move items to the roadmap, you must populate the Planned Start Date, Planned End Date, and Assigned To fields on the item.

The View Adoption Roadmap Timeline report organizes adoption items on your roadmap in a Gantt chart. You can click an item on the timeline to edit, delete, or move it to the backlog.

You can also use the Maintain Adoption Backlog or Maintain Adoption Roadmap tasks to edit adoption items. Select adoption items and click Edit Adoption Items to mass or individually edit adoption items.

Concept: Adoption Planning Dashboard

Note: We plan to retire this version of Adoption Planning in 2026R1. Workday recommends that you enable the Adoption Planning Hub in your Production tenant ahead of this retirement. See Setup Considerations: Adoption Planning Hub on page 209.

The Adoption Planning dashboard is secured to the *Dashboard: Adoption Planning* domain in the Adoption functional area.

You can use this dashboard to gain insight into your current usage of Workday, helping you make informed decisions as you adopt features.

You can use the Maintain Dashboards task to configure the Adoption Planning dashboard. See Configure Dashboard Content.

Workday provides these reports as worklets that you can add to your Adoption Planning dashboard:

Worklet	Description
Retiring Features	Displays data from Retirements , under What's Retiring in the Release Center, specific to your tenant. We update this report for each release.

Worklet	Description
Supplementing What's New	Displays the Release Center, from which you can select Fixes under the What's Changed This Week section.
What's New in Last 7 Days	Displays data contained in the What's New in Workday report for the last 7 days.
What's New in Last 6 Months	Displays data contained in the What's New in Workday report for the last 6 months.

Note: The Retiring Features worklet enables automatically when the dashboard has 5 or fewer worklets. When there are 6 or more worklets enabled on the dashboard, you must enable the Retiring Features worklet from the Maintain Dashboards task.

You can also add these tasks to your Adoption Planning dashboard:

- Create Adoption Item
- Maintain Adoption Backlog
- Maintain Adoption Roadmap
- View Adoption Roadmap Timeline

Workday also provides reports and dashboards, such as the Usage Metrics dashboard (secured to the Workday *Usage Metrics* domain in the System functional area). Use this dashboard to drill into usage metrics such as:

- HR and Pay Functionality Usage at Month-End
- Financials Functionality Usage at Month-End

Workday recommends that you grant security access to these groups:

- Business process administrators.
- HR administrators.
- Report administrators.
- Security administrators.

Related Information

Concepts

Concept: End User Adoption Dashboard on page 226

Tasks

Steps: Set Up Dashboards and Landing Pages on page 310

Add Dashboard Menus on page 311

Concept: End User Adoption Dashboard

Note: We plan to retire this version of Adoption Planning in 2026R1. Workday recommends that you enable the Adoption Planning Hub in your Production tenant ahead of this retirement. See Setup Considerations: Adoption Planning Hub on page 209.

The End User Adoption Dashboard enables you to view business process and mobile-related Workday Usage Metrics and analysis reports. You can use these insights to identify trends in end-user activity and to help plan your feature adoption.

Workday includes these reports on the End User Adoption Dashboard menu, enabling you to analyze mobile usage:

- Signons by Device
- Mobile App Usage

Workday also includes these worklets on the dashboard:

- Mobile App Usage Trends
- Unique Signons by Device Trends
- Business Process Initiation Trends

To access report data for these worklets, you must have access to these domains:

- *Workday Usage Metrics* in the System functional area.
- *Dashboard: End User Adoption* in the Adoption functional area.

Access the Maintain Dashboards task to configure the End User Adoption Dashboard worklets and select which reports display on the menu. After you configure the dashboard, you can optionally add it as a worklet on your Home page or add it to the Adoption Planning dashboard menu.

Workday recommends that you grant security access to these groups:

- Implementers.
- Workday Insight report users.
- Workday Insight security group.

Related Information
Tasks

Steps: Set Up Dashboards and Landing Pages on page 310

Add Dashboard Menus on page 311

Example: Create Roadmap Adoption Item

Note: We plan to retire this version of Adoption Planning in 2026R1. Workday recommends that you enable the Adoption Planning Hub in your Production tenant ahead of this retirement. See Setup Considerations: Adoption Planning Hub on page 209.

This example illustrates how to create a single adoption item for your roadmap from multiple features on the What's New in Workday report.

Context

You're an HR Administrator with 6 months of new benefits features on the What's New in Workday report that you need to adopt. You want to:

- Group the related benefits features in a single adoption item.
- Add the adoption item to your roadmap.
- Assign the adoption item to a manager.
- Set a deadline of November 1, 2019 for adoption.

Prerequisites

Security: *Adoption Planning* domain in the Adoption functional area.

Steps

1. Access the What's New Item Actions task.
2. In the What's New Item Actions section, enter:

Option	Description
From	03/08/2019
To	09/08/2019
Functional Area	*Benefits*

3. Click Search.

4. To filter the What's New Items report to display only the features that require setup, click the Setup Effort column header and enter:

Option	Description
Filter Condition	*is*
Value	*Setup Required*

5. Click Filter.
6. Select the check box at the top of the What's New Items report.

   This check box enables you to select all items in the report.
7. In the Actions section, select Create Adoption Item for Group and click OK.
8. In the Item section, enter:

Option	Description
Name	Benefits
Assigned To	Robert Hsing
Type	*New Feature*
Status	*On Roadmap*
Functional Area	*Benefits*

9. In the Roadmap section, enter:

Option	Description
Planned Start Date	10/01/2019
Planned End Date	11/01/2019

10. In the Priority Evaluation section, enter:

Option	Description
Priority	*High*
Setup Effort	*Setup Required*

11. Click OK.

Result

The adoption item that you've created is on your roadmap.

Next Steps

Create a new roadmap adoption item for your non-Workday projects.

Access the View Adoption Roadmap Timeline report to view your Benefits adoption item in a Gantt chart.

Related Information

Concepts

Concept: Feature Adoption on page 224

Concept: Adoption Planning Dashboard on page 225

Tasks

Create Adoption Items on page 223

Example: Create Backlog Adoption Items

Note: We plan to retire this version of Adoption Planning in 2026R1. Workday recommends that you enable the Adoption Planning Hub in your Production tenant ahead of this retirement. See Setup Considerations: Adoption Planning Hub on page 209.

This example illustrates how to add your low-priority features in the What's New in Workday report to your adoption item backlog.

Context

You're an HR administrator with 6 months of new features in the What's New in Workday report. You want to add these features as individual items to your adoption backlog.

Prerequisites

Security: *Adoption Planning* domain in the Adoption functional area.

Steps

1. Access the What's New Item Actions task.
2. In the What's New Item Actions section, enter:

Option	Description
From	03/08/2019
To	09/08/2019
Functional Area	*Advanced Compensation*

3. Click Search.
4. To filter the What's New Items report to display only the features that require setup, click the Setup Effort column header and enter:

Option	Description
Filter Condition	*is*
Value	*Setup Required*

5. Click Filter.
6. Select the check box at the top of the What's New Items report.

   This check box enables you to select all items in the report.
7. In the Actions section, select Create Adoption Item for Each and click OK.
8. In the Item section, enter:

Option	Description
Name	Compensation
Type	*New Feature*
Status	*In Backlog*

9. Click OK.

Next Steps

Access the Maintain Adoption Backlog task to move an adoption item from your backlog to your roadmap.

When new features display on the What's New in Last 7 Days report, drill down on the value in the Setup Required column. You can then add these items to your backlog using the related actions menu.

Related Information

Concepts

Concept: Feature Adoption on page 224

Concept: Adoption Planning Dashboard on page 225

Tasks

Create Adoption Items on page 223

Workday Usage Metrics

Steps: Set Up Workday Usage Metrics

Context

To access Workday Usage Metrics reports and emails, create a user-based security group and grant permissions for Workday Usage Metrics security domains.

Workday calculates the metrics on the first Sunday of each month and makes data available when the calculation job completes. For the calculation job to run successfully for your tenant, you must have a worker in the security group you created. If no worker is in the security group as of the first Sunday of the month, the calculation job won't run. Additionally, to receive the monthly Workday Usage Metric email, don't block the Workday email address in your network.

Steps

1. Create User-Based Security Groups.

   Configure a user-based security group for users to view Workday usage metrics data.
2. Access the Domain Security Policies for Functional Area report.

   Security: *Security Configuration* and *Security Activation* in the System functional area.
3. Select *System* from the Functional Area prompt.
4. From the related actions menu of the Domain Security Policy for these domains, select Domain Security Policy > Enable:
   - *Workday Usage Metrics*
   - *Workday Usage Metrics Email*
   - *Workday Usage Metrics Rerun Email*
5. From the related actions menu of the Domain Security Policy for each Workday Usage Metrics domain, select Domain Security Policy > Edit Permissions.

   For each security domain, add your usage metrics user-based security group and grant additional permissions that best fit your organization.

   If you can view the *Workday Insight Security Group (auto-created)* or the *Workday Insight Report Users (auto-created)* security groups, don't remove either security group.
6. Activate Pending Security Policy Changes.

Next Steps

Run the Workday Usage Metrics Status report to verify the status of your usage metrics security permissions.

Related Information

Tasks

Edit Domain Security Policies

Reference

Reference: Workday Usage Metrics Statuses on page 232

Concept: Workday Usage Metrics

Workday Usage Metrics is a feature that provides data on how your business uses its Workday investment. Workday Usage Metrics help your executives, Workday administrators, and HR analysts understand the:

- Depth, breadth, and processing volumes of your tenant.
- Application functionality currently in use.
- Options for deriving more value from Workday.

With usage metrics data, you can make better decisions on how to optimize your Workday implementation.

Usage metrics data includes:

Data	Description
Utilization data	View that specific Workday functionality is in use.
Business statistics	Gain visibility into the structure and operation of your organization, such as: • Active employees. • Leave types. • Number of projects.
System statistics	View reports on operations specific to your Workday usage, such as the number of: • Custom reports. • Custom worklets. • Calculated fields.
Business activities	See the business activities that took place during the month in areas, such as: • Staffing. • Compensation. • Benefit events.
System activities	Gain insight into your Workday activities, such as the number of: • Sign-in sessions. • Password changes. • Integration runs.

Reporting

When you set up Workday Usage Metrics security, Workday performs monthly calculations on your Production tenant data as a background process. Workday makes this data available the first Sunday of the month. For the calculation job to run successfully for your tenant, you must have a worker in the security group you created. If no worker is in the security group as of the first Sunday of the month, the calculation job won't run. Additionally, to receive the monthly Workday Usage Metric email, don't block the Workday email address in your network. To rerun usage metrics calculations for a previous month, you must open a service ticket.

Once the data is available, authorized users can:

- View the Workday Usage Metrics Report, which displays usage metrics data for a specified month. This report doesn't display data before 2012 or the date you opted in, whichever is later.
- Access the Workday Usage Trends Report to view usage data trends over a selected time period.
- Create custom reports with the Workday Usage Metrics report data source (RDS).
- Create custom reports of trended data using the Workday Usage Metrics (Historical) RDS.

- Receive Workday Usage Metrics emails.

Workday Usage Metrics reports and RDSs are available in your Production and Sandbox tenants. Usage metrics values are only available in your Production tenant.

Emails

The Workday Usage Metrics email delivers on the first Sunday of the month. Workday sends the usage metrics email to authorized users included in the *Workday Usage Metrics Emails* domain security policy. This email includes:

- A subset of metrics.
- Links to metrics descriptions.
- Links to usage metrics reports.

When Workday updates the logic for existing metrics, Workday sends a Recalculated Workday Usage Metrics email to users in the *Workday Usage Metrics Rerun Emails* domain. Workday can recalculate metrics from up to 1 year or the date of your Workday usage metrics opt in, whichever is later.

Reference: Workday Usage Metrics Statuses

The Workday Usage Metrics Status report displays the status of permissions to view usage metrics reports and to receive usage metrics emails.

For a status of *No* or *None*, consider:

Issue	Resolution
The Workday Usage Metrics domain security policy is enabled	Enable the *Workday Usage Metrics* domain security policy.
Users permitted to view Workday Usage Metrics Reports	Enable the *Workday Usage Metrics* domain security policy.
The Workday Usage Metrics Emails domain security policy is enabled	Enable the *Workday Usage Metrics Emails* domain security policy.
Users permitted to receive monthly Workday Usage Metrics email report	Enable the *Workday Usage Metrics Emails* domain security policy.
The Workday Usage Metrics Rerun Emails domain security policy is enabled (optional)	Enable the *Workday Usage Metrics Rerun Emails* domain security policy.
Users permitted to receive monthly Workday Usage Metrics rerun emails (optional)	Enable the *Workday Usage Metrics Rerun Emails* domain security policy.

Related Information
Tasks
Steps: Set Up Workday Usage Metrics on page 230

Machine Learning and Innovation Services

Steps: Set Up Notifications for AI Feature Data Contributions

Context

Universal Main Subscription Agreement (UMSA) customers can configure the *AI Features and Third Party Notification* domain to receive notifications about:

- Changes to data contributions for existing AI features.

- Upcoming AI features applicable to your purchased SKUs.

Workday sends notifications:

- 30 days prior to any Workday release that contains new AI features.
- On the day of the Workday release that contains new AI features.

Note: To determine your company's subscription agreement type:

1. Access your Community profile.
2. Beneath your name, click the name of your company.

In the Subscription Service Agreement field:

- MSA indicates the Main Service Agreement (MSA) type.
- UMSA indicates the Universal Main Subscription Agreement (UMSA) type.

Steps

1. Edit Domain Security Policies.

   Add the relevant security groups to the *AI Features and Third Party Notification* domain in the Innovation Services functional area.
2. Activate Pending Security Policy Changes.
3. Access the Edit Tenant Setup - Notifications task.

   On the System tab of the Notification Delivery Settings section, verify the routing rule for the Parent Notification Type includes email notifications.

   If not, from the Ascend Notifications row, select the Override Parent Notification Type Settings check box, and select a routing rule that includes email notifications. See Create Notification Routing Rules.

   Security:*Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Result

Security group members will receive notifications about upcoming changes to AI features.

Enable Innovation Services Feature and AI Data Contributions for MSA Customers

Context

Innovation Services offers features that provide functionality beyond Workday's core products. When your organization's Subscription Service Agreement is the Main Service Agreement (MSA), you can only access these features through Innovation Services. To access Innovation Services, you must sign the Innovation Services Addendum (ISA). Then, you can enable Innovation Services features using these steps.

Some Innovation Services features use artificial intelligence (AI) as part of their functionality. For these features, you must also enable data contribution, which Workday uses to provide better in-feature AI results.

Contact your Customer Success Manager, or have your Named Support Contact Administrator open a Customer Success request via Workday Community, to acquire and sign the order form to subscribe to Innovation Services.

Steps

1. Enable the Innovation Services functional area.

   See: Steps: Enable Functional Areas and Security Policies.
2. Edit Domain Security Policies.

   Configure the *Manage: Innovation Services* domain in the Innovation Services functional area.

3. Access the Innovation Services and Data Selection Opt-In report.
4. On the Innovation Services Opt-In task, select the check box for the feature you want to enable from the Available Services tab.
5. (Optional) On the Maintain Innovation Services Data Selection Opt-In task, select the check boxes for the data you want to contribute for AI.

   See: Reference: Machine Learning Data Contributions to view which data contributions the feature requires.

Next Steps

AI features that require data contributions won't function accurately in your Sandbox tenant. To test AI features before deploying them to your Production tenant, use your Sandbox Preview or Implementation tenants.

You can use these tasks to test your configuration in your Implementation tenant.

Task	Description
Maintain Weekly Data Contribution Activation for Implementation Tenant	Manages future weekly data extracts.
Run On-Demand Data Contribution Activation for Implementation Tenant	Extracts data and subscribes the tenant to future weekly extracts.

To ensure accurate testing, Workday recommends you refresh your Sandbox Preview or Implementation tenant before running these tasks. Because AI features require a certain amount of data, it can take up to 2 weeks for recommendations to appear.

Related Information
Examples
Workday Community: Workday AI Gateway
Workday Community: Workday Innovation Services
Workday Community: Workday Innovation Services - Frequently Asked Questions

Manage Workday AI Data Contributions for Universal Main Subscription Agreement Customers

Prerequisites

- Your organization must be on the Universal Main Subscription Agreement.

  Note: To determine your company's subscription agreement type:

  1. Access your Community profile.
  2. Beneath your name, click the name of your company.

  In the Subscription Service Agreement field:

  - MSA indicates the Main Service Agreement (MSA) type.
  - UMSA indicates the Universal Main Subscription Agreement (UMSA) type.
- Security: These domains in the Innovation Services functional area:
  - *Manage: Data for ML Features*
  - *View: Data for ML Features*

Context

When you move to the UMSA, you automatically enable data contributions for AI features.

You can manage data contributions for AI features by product line or AI feature.

For more information on feature-level contributions, see Reference: Machine Learning Data Contributions.

Steps

1. Access the Data Contribution for Workday AI report.
2. Complete the task:

Field	Description
Disallow Data Contribution	When you select this check box, Workday: • Disables data contribution for the associated product line or AI feature. • Deletes your past data contributions within 30 days.
Data Details	Click View Data Collected to view definitions for the types of data contributed to Workday.
View Upcoming Contribution Changes	Click Contribution Changes to view upcoming changes to the feature's required data contributions.
Countries Excluded from Data Collection by End User Location	At the AI feature level, select countries that you would like to exclude from data contributions.

3. Click OK.

Result

When you disable data contributions, Workday stops collecting new data and deletes your past contributions within 30 days.

Note:

Disabling data contributions can impact the performance of certain AI features. The impact of disabling data contributions will vary by feature, from a degraded experience to the feature not functioning at all.

To understand how disabling contributions may affect a feature, see the feature's Workday AI Fact Sheet.

Related Information
Concepts
Concept: Workday AI for Universal Main Subscription Agreement Customers on page 236

Concept: Form Completion Assistant

Form Completion Assistant (FCA), also referred to as Intelligent Prompt Recommendations, uses artificial intelligence (AI) to recommend responses for prompts based on historical data, enabling you to complete tasks more easily.

You can manage FCA support for these prompts by accessing the Maintain Machine Learning Prompt Recommendations task.

Security

To access the task, you need security permissions to at least one of the following domains:

Domain	Functional Area
Set Up: Calendar	*System*

Domain	Functional Area
Set Up: Payroll	*Core Payroll*
Set Up: Purchase Item	*Procurement*
Set Up: Recruiting	*Recruiting, Talent Pipeline*
Set Up: Tenant Setup - Financials	*System*
Set Up: Tenant Setup - HCM	*System*
Set Up: Tenant Setup - Student	*System*
Set Up: Time Tracking	*Time Tracking, Time Tracking Hub*

Training Time and Availability

Workday requires up to 2 weeks to train the intelligent models with your historical data and display prompt recommendations.

FCA is optimized for Universal Main Subscription Agreement (UMSA) subscribers, but all purchasers of relevant SKUs can use it. See Concept: Workday AI for Universal Main Subscription Agreement Customers.

Opting Out of Prompt Recommendations

You can opt out of recommendations by accessing the Maintain Machine Learning Prompt Recommendations task and clearing the Enable Machine Learning Recommendations check boxes associated with features in your tenant.

For mapping between FCA-supported prompts and their corresponding check boxes on the Maintain Machine Learning Prompt Recommendations task, see Reference: Form Completion Assistant.

Related Information

Examples

Workday Community: Form Completion Assistant

Concept: Workday AI for Universal Main Subscription Agreement Customers

Note: To determine your company's subscription agreement type:

1. Access your Community profile.
2. Beneath your name, click the name of your company.

In the Subscription Service Agreement field:

- MSA indicates the Main Service Agreement (MSA) type.
- UMSA indicates the Universal Main Subscription Agreement (UMSA) type.

Workday often relies on data contributions to deliver artificial intelligence (AI) features. For customers who are subject to the UMSA, Workday automatically enables data contributions for AI features in your purchased SKUs. Workday may use this data to train or enhance the associated AI feature.

Note: Workday activates AI features for UMSA customers in stages:

- Workday enables AI features in the next service update, such as the weekly maintenance window.
- Data contributions populate in the Data Contributions for Workday AI task within 24 hours.
- AI recommendations appear in your tenant within 14 days.

Data Contributions

UMSA customers can manage their data contributions using the Data Contribution for Workday AI task, secured to the *Manage: Data for ML Features* and *View: Data for ML Features* domains in the Innovation Services functional area. See Manage Workday AI Data Contributions for Universal Main Subscription Agreement Customers on page 234.

Workday groups data contributions by the AI feature that uses the data, so you only share the specific data needed for each feature. You can manage contributions for each feature individually or at the product line level.

To view the data categories needed for each AI feature, see Reference: Machine Learning Data Contributions.

When you disable data contributions for an AI feature or a product line, you no longer contribute data and Workday deletes your past data contributions within 30 days.

Note:

Disabling data contributions can impact the performance of certain AI features. The impact of disabling data contributions will vary by feature, from a degraded experience to the feature not functioning at all.

To understand how disabling contributions may affect a feature, see the feature's Workday AI Fact Sheet.

These reports can also help you view contribution details:

- The AI Features Data Details report, secured to the *View: Data for ML Features* domain, displays the data contributions associated with all AI features available across Workday, filtered by product line.
- The Intelligent Features Report report, secured to the *Manage: Data for ML Features* and *View: Data for ML Features* domains, displays AI features for all SKUs and AI features for your purchased SKUs.

AI Feature Notifications

You can enable notifications about upcoming changes to AI features by configuring the *AI Features and Third Party Notification* domain in the Innovation Services functional area. See Steps: Set Up Notifications for AI Feature Data Contributions on page 232.

Members of security groups on the *AI Features and Third Party Notification* domain receive notifications about:

- Changes to data contributions for existing AI features.
- Upcoming AI features applicable to your purchased SKUs.

Workday sends notifications:

- 30 days prior to any Workday release that contains new AI features.
- On the day of the Workday release that contains new AI features.

Workday doesn't extract data for the new AI feature until 14 days after the Workday release. You can disable data contributions the day of the AI feature release.

Testing AI Features

AI features that require data contributions won't function accurately in your Sandbox tenant. To test AI features before deploying them to your Production tenant, use your Sandbox Preview or Implementation tenants.

You can use these tasks to test your configuration in your Implementation tenant.

Task	Description
Maintain Weekly Data Contribution Activation for Implementation Tenant	Manages future weekly data extracts.

Task	Description
Run On-Demand Data Contribution Activation for Implementation Tenant	Extracts data and subscribes the tenant to future weekly extracts.

To ensure accurate testing, Workday recommends you refresh your Sandbox Preview or Implementation tenant before running these tasks. Because AI features require a certain amount of data, it can take up to 2 weeks for recommendations to appear.

Related Information

Examples

Workday Community: Streamlining Feature Adoption and the Workday AI Home Page

Workday Community: Workday AI Gateway

Reference: Form Completion Assistant

Form Completion Assistant (FCA) uses artificial intelligence (AI) to recommend responses for prompts based on historical data, enabling you to complete tasks more easily. Workday provides FCA support for prompts on these reports and tasks.

You can manage FCA support for these prompts by accessing the Maintain Machine Learning Prompt Recommendations task.

These tables illustrate the association between FCA supported prompts on reports and tasks and their corresponding fields on the Maintain Machine Learning Prompt Recommendations task.

FCA is optimized for Universal Main Subscription Agreement (UMSA) subscribers, but all purchasers of relevant SKUs can use it.

- Financial Management on page 238
- Learning on page 239
- Payroll on page 239
- Payroll for USA on page 240
- Payroll for Canada on page 240
- Spend Management on page 241
- Student on page 241
- Time Tracking on page 241

Financial Management

Report or Task	Prompt	Product Area	Category	Field
Find Ad Hoc Bank Transactions	Company	Cash Management	Other Reports, Tasks, and Business Objects	Prompts in Standard Reports
Find Customer Deposits Find Customer Invoices for Company Find Customer Payments	Company	Accounts Receivable	Other Reports, Tasks, and Business Objects	Prompts in Standard Reports
Find Journal Lines Find Journals	Company	Accounting and Finance	Other Reports, Tasks, and Business Objects	Prompts in Standard Reports

Report or Task	Prompt	Product Area	Category	Field
Find Supplier Invoice Requests Find Supplier Invoices Supplier Activity Details	Company	Accounts Payable	Other Reports, Tasks, and Business Objects	Prompts in Standard Reports

Learning

Task	Prompt	Category
All the Create, Edit, Review and Revise tasks for courses and programs Schedule Course Offering	Contacts	Content
All the Create, Edit, Review and Revise tasks for courses, programs, and stand-alone lessons	Languages	Content
All the Create, Edit, Review and Revise tasks for courses, programs, and stand-alone lessons	Topics	Content
Schedule Course Offering	Instructors	Content
Schedule Course Offering	Location	Content
Reset Expiration Date on Learning Records	Supervisory Organization	Compliance
Waive Learning Assignment	Learning Organizations	Compliance

Payroll

Category	Prompt	Product Area	Task or Report
Costing Allocations	• Costing Company • Earning • Position Restriction • Worker		Assign Costing Allocations
Off Cycle Payments	• Bank Account • Pay Component • Reason		• Run Manual Payment for Worker • Run On Demand Payment for Worker
Payroll Accounting Adjustments	• Change Reason • Employee		Create Payroll Accounting Adjustment

Category	Prompt	Product Area	Task or Report
Payroll Input	• Pay Component • Pay Component - Payroll Interface • Run Category		• Add Payroll Input • Add Payroll Input by Result • Add Payroll Input by Worker • Edit Payroll Input • Maintain External Payroll Input for Worker
Proposed Pay Group	• Proposed Pay Group • Proposed Pay Group - Additional Payroll Data - Payroll Interface		• Additional Payroll Data • Assign Pay Group
Run Pay Calculation	Pay Run Group and/or Pay Group Details		Run Pay Calculation
Tax Filing Reports	• Company (Periodic Worker Report) • Payroll Tax Authority (Periodic Worker Report)		Tax Filing Periodic Data for Workers

Payroll for USA

Category	Prompt	Task or Report
Record US Withholding Order for Worker	Creditor Garnishment Type	Record US Withholding Order for Worker

Payroll for Canada

Report or Task	Field	Product Area
Cancel ROE Prior Period History Results	Companies	ROE
Create ROE Data for Events	• Companies • Pay Group • ROE Creation Criteria	ROE
Record CAN Withholding Order for Worker	Deduction Recipient	Withholding Orders
ROE Prior Period History Results	Companies	ROE
View ROEs to Amend	• Companies • Pay Group	ROE

Spend Management

Report or Task	Prompt	Product Area	Category	Field
Find Expense Reports	Company	Expenses	Other Reports, Tasks, and Business Objects	Prompts in Standard Reports
Find Inventory Balance Find Inventory Transactions	Location	Inventory	Other Reports, Tasks, and Business Objects	Prompts in Standard Reports
Find Par Count	Company	Inventory	Other Reports, Tasks, and Business Objects	Prompts in Standard Reports
Find Receipts Find Requisitions Ledger Detail	Company	Procurement	Other Reports, Tasks, and Business Objects	Prompts in Standard Reports

Student

Report or Task	Prompt	Product Area	Category	Field
Add Student Note	Note Topic(s)	Student	Campus Engagement	Note Topic
Add Test Result	Test	Student	Admissions	Test
Create Student Eligibility Rule	Academic Unit	Student	Academic Foundation	Academic Unit
Create Student Eligibility Rule	Eligibility Rule Type	Student	Academic Foundation	Eligibility Rule Type
Edit Cost of Attendance	Academic Period	Student	Financial Aid	Academic Period
Edit Total Financial Assistance	Awards	Student	Financial Aid	Awards
Run Student Financials Processes by Period	Academic Year	Student	Financials	Academic Year

Time Tracking

Report or Task	Prompt	Category	F
Check In Edit and Approve Time	Time Type	Time Tracking	T

Report or Task	Prompt	Category	F
Enter Time by Type Enter Time by Week Time Block Micro Edit Quick Add	Time Type	Time Entry	T

Related Information

Examples

Workday Community: Form Completion Assistant

Reference: Workday AI Data Contributions

Based on your organization's subscription service agreement, these features require you to contribute your tenant data to maximize the benefits of artificial intelligence (AI) and machine learning (ML).

- Cross Application Services: Intelligent Core Generally Available Features
- Financials: Financial Management Machine Learning GA Features
- Financials: Receipt Scanning for Expenses
- HCM: HCM Machine Learning GA Features
- HCM: Workforce Management Machine Learning Services
- Payroll: Payroll Machine Learning GA Features
- People Experience: User Experience Machine Learning
- Spend Management: Spend Management Machine Learning GA Features

Cross Application Services: Intelligent Core Generally Available Features

ML Feature	Opt-In Data Category	Considerations
Machine Learning Recommendations for Change Job	Custom Organization Data Supervisory Organization Data Staffing Event Data Worker Profile Data	Country exclusion is unavailable for the Supervisory Organization Data and Custom Organization Data categories.

Financials: Financial Management Machine Learning GA Features

Data Category	Consideration
Customer Payment Data	To enable Intelligent Customer Payment Matching, you must have customer payment transaction data in the past 30 days. This functionality provides beneficial recommendations only when you're processing customer payments in Workday.
Expenses Data	To use the Expense Protect feature, you need at least 10,000 expense report lines in your tenant. When users submit expenses, Expense Protect automatically evaluates them to provide risk levels, recommendations, and insights.

Data Category	Consideration
Journal Line Data	Before you can use the Journal Insights feature, you need at least 12 months of existing historical data.
Supplier Invoice Data	You can enable ML suggestions for your top 5 most commonly used selections for these worktags on supplier invoice lines: • Cost center • Location • Region • Spend category Note: After you opt in to the Innovation Service, you must enable worktag recommendations on supplier invoice documents in the Supplier Accounts Options section on the Edit Tenant Setup – Financials task.
Accounts Receivable Data	To enable customer overpayment reason and worktag recommendations, you need a minimum of 3,000 historical customer overpayments. To enable recommendations for customer invoice lines, you need a minimum of 3,000 customer invoices with the revenue category and sales item fields.

Financials: Receipt Scanning for Expenses

Data Category	Consideration
Receipt Scanning for Expenses	You can scan receipts in PDF, JPG, TIFF, and PNG file formats.

HCM: HCM ML Features and Third Party Connectors GA

To enable ML for these features, you must enable the HCM ML Features and Third Party Connectors GA service and enable data contribution for each feature.

ML Feature	ML Categories for Feature	Opt-In Data Category	Considerations
ML for Worker Profile and Skills	• Skills Cloud • Skills Suggestions and Verification	• Job Requisition Data • Talent Profile Data • Worker Profile Data	• Workday recommends enabling Skills Cloud to maintain the skills data of your workers. • Country exclusion is unavailable for the Talent Profile Data and Job

ML Feature	ML Categories for Feature	Opt-In Data Category	Considerations
			Requisition Data categories. • While not required, Workday recommends you opt in to contributing data for the Skills Cloud and Skills Suggestions and Verification categories.
ML for Recruiting	• Suggested Jobs for External Candidates • Suggested Skills for External Candidates • Suggested Skills for Job Requisitions	Job Requisition Data	Country exclusion is unavailable for the Job Requisition Data category.
ML for Learning Core	• Learning Skills Tagging • Machine Learning Recommended For You • Related Content Recommendations • Based on Your Skills to Develop	Learning Data	• Use the Edit Tenant Setup - HCM task to configure the Related Content Recommendations worklet. • Use the Maintain Learner Experience task to configure the Based on Your Skills to Develop and Machine Learning Recommended For You worklets. • You must opt into the Learning Data category to use the Based on Your Skills to Develop worklet. Workday provides a non-ML version of recommendations if you don't opt into it.

ML Feature	ML Categories for Feature	Opt-In Data Category	Considerations
			• You must opt into the Learning Data category to use the Related Content Recommendations worklet. • You must opt into the Learning Data and Worker Profile Data categories to use the Machine Learning Recommended For You worklet. • Workday updates ML data every 24 hours, Monday through Friday.
ML for Talent Marketplace	Talent Marketplace	• Demographics Data • Job Requisition Data • Learning Data • Projects Data • Skills Data • Talent Opportunity Marketplace Data • Worker Profile Data	• Country exclusion is unavailable for the Job Requisition Data and Talent Opportunity Marketplace Data categories. • Talent Opportunity Marketplace Data and Worker Profile Data are required. For details about which features depend on these data categories, see Steps: Set Up Talent Marketplace.
ML for Career Hub	Career Hub	• Job Requisition Data • Learning Data • Talent Opportunity Marketplace Data • Talent Profile Data	• You must be a Career Hub customer and meet certain requirements to use this feature. Contact your Customer Success

ML Feature	ML Categories for Feature	Opt-In Data Category	Considerations
		• Worker Profile Data • Skills Data	Manager for information on Career Hub. • Country exclusion is unavailable for the Job Requisition Data, Talent Opportunity Marketplace Data, and Talent Profile Data categories. • Talent Profile Data and Worker Profile Data are required. For details about which features depend on these data categories, see Steps: Set Up Career Hub.
ML for Manager Insights Hub	Manager Insights Hub	• Learning Data • Talent Opportunity Marketplace Data • Worker Profile Data	• Country exclusion is unavailable for the Talent Opportunity Marketplace Data category. • The Suggested Opportunities section of Manager Insights Hub uses ML to make personalized suggestions. To access this functionality, opt in to the HCM Machine Learning GA Features service and relevant data categories, and enable Skills Cloud and Interests.

Note: If you enabled Skills Cloud through the Workday Graph innovation service, your data selection and Skills Cloud configuration remain valid.

You can access the Innovation Service Data Details report to drill into the fields tied to the HCM ML Features and Third Party Connectors GA service.

HCM: Workforce Management Machine Learning Services

Data Category	Consideration
Time Configuration Data	• You must contribute data from this category to use the Workday Time Anomaly feature. • Workday updates the data used to train the ML model weekly with all time entry template, work schedule calendar, and time calculation data.
Worker Data	• You must contribute data from this category to use the Workday Time Anomaly feature. • Workday updates the data used to train the ML model weekly with limited worker organization and job data for workers who have entered time.
Historical Schedule Block Data	• You must contribute data from this category to use the Workday Time Anomaly feature. • Workday updates the data used to train the ML model weekly with historical schedule blocks for workers,
Worker Time and Absence Data	• You must contribute data from this category to use the Workday Time Anomaly feature. • Workday updates the data used to train the ML model weekly with all workers' time block, time block history, time off entry, and time review event data.
User Feature Delivery Data	• You can contribute data in your tenant from the User Feature Delivery Data category to help Workday detect time anomalies. • To see which data from this category you're contributing, run the Innovation Service Data Details report for Workforce Management Machine Learning Services. • Country exclusion is unavailable for this category.

Payroll: Payroll Machine Learning GA Features

Select Payroll: Payroll Machine Learning GA Features from the Innovation Services Valid for Maintain Data Opt-In field. Select the Opt In check box for these categories:

Data Category	Consideration
Anomalous Payroll Results	You must contribute data from this category to use the Workday Pay Anomalies feature
Payroll Data	• You must contribute data from this category to use the Workday Pay Anomalies feature.

Data Category	Consideration
	• We recommend that your tenant has at least 6 pay periods or more of historical payroll data before opting into this feature. This ensures there's enough training data for the ML model.
Payroll Data (Historical)	• You must contribute data from this category to use the Workday Pay Anomalies feature. • We recommend that your tenant has at least 6 pay periods or more of historical payroll data before opting into this feature. This ensures there's enough training data for the ML model.
Pay Anomalies Validations	You must contribute data from this category to use the Workday Pay Anomalies feature.
Previous States of Payroll Results (Historical)	• You must contribute data from this category to use the Workday Pay Anomalies feature. • We recommend that your tenant has at least 6 pay periods or more of historical payroll data before opting into this feature. This ensures there's enough training data for the ML model.
Worker Data	You must contribute data from this category to use the Workday Pay Anomalies feature.
P45 Tax Form Scanning	You must select this category to use the Workday P45 Tax Form Scanning feature.

Note: To enable Pay Anomalies functionality and build tenanted models, you must opt in to these categories:

- Anomalous Payroll Results
- Payroll Data
- Payroll Data (Historical)
- Pay Anomalies Validations
- Previous States of Payroll Results (Historical)
- Worker Data

Not selecting these data categories will result in the ML model failing to build and deploy as designed. The Pay Anomalies feature won't be fully functional without these models.

Workday recommends that you don't opt out of the innovation service once you run the Pay Anomalies report to view predictions. Opting out disables the feature and causes data synchronization issues.

People Experience: User Experience Machine Learning

Data Category	Consideration
Workday-Generated User Information	Workday displays the 3 recommended tasks in the Quick Tasks section on the home page based on: • The trends occurring across tenants. • User activity in your production tenant.

Data Category	Consideration
Knowledge Management Articles	You can contribute data in your tenant from the Knowledge Management Articles category, enabling Workday to recommend relevant articles to users.
Search Query	You can contribute data in your tenant from the Search Query category to provide more relevant and personalized search results when using Workday Search.

Spend Management: Spend Management Machine Learning GA Features

Data Category	Consideration
Spend Transaction Data	• If you opted in before Workday added support for purchase orders, Workday displays an Opt In to Additional Data check box. Select this check box to contribute data for purchase order recommendations. • When you opt out of the data contribution, Workday purges your data within 2 weeks.

Related Information
Examples
Workday Community: Workday Innovation Services

FAQ: Transitioning from Innovation Services Addendum (ISA) to the Universal Main Subscription Agreement (UMSA)

- Why can I no longer access Innovation Services reports and security domains?
- Do I need to opt in to Workday AI features on the UMSA, as I did on the ISA?
- How do I validate that features I enabled under the ISA remain enabled under the UMSA?
- How do I validate that third-party integrations enabled under the ISA are enabled under the UMSA?
- Is data contribution for Intelligent Application features enabled by default under UMSA?
- How can I opt out of data contribution for Workday AI features?
- How has security configuration changed for AI features under UMSA?
- How can I see the specific data Workday uses for AI features?
- How does Workday notify me about new or updated AI features?
- What happened to the Media Cloud Addendum? Does my existing content (like SCORM/AICC files) still work?
- What configurations do I need to review for Workday Learning?
- How do I submit support requests for subscription management (such as new licenses)?

Why can I no longer access Innovation Services reports and security domains?	When you sign the Universal Main Subscription Agreement (UMSA), Workday replaces the reports, tasks, and security domains for managing Innovation Services with those for managing Workday AI (artificial intelligence) features on the UMSA. See Concept: Workday AI for Universal Main Subscription Agreement Customers on page 236

	Example: Rather than using the Innovation Services and Data Selection Opt-In report (secured to the *Manage: Innovation Services* domain) to manage Workday AI features, you'll use the Data Contribution for Workday AI report (secured to the *Manage: Data for ML Features* and *View: Data for ML Features* domains). UMSA customers can disregard all information regarding Innovation Services.
Do I need to opt in to Workday AI features on the UMSA, as I did on the Innovation Services Addendum (ISA)?	Most AI and third-party integration features are automatically available under the UMSA. To manage these features, see Manage Workday AI Data Contributions for Universal Main Subscription Agreement Customers on page 234.
How do I validate that features I enabled under the ISA remain enabled under the UMSA?	Access the Data Contribution for Workday AI report (secured to the *Manage: Data for ML Features* and *View: Data for ML Features* domains) to review Workday AI features enabled under the UMSA and ensure that default settings meet your organization's needs. For instructions on managing feature enablement, see Manage Workday AI Data Contributions for Universal Main Subscription Agreement Customers on page 234. For considerations on the impact of managing your features, see Reference: Workday AI Data Contributions on page 242.
How do I validate that third-party integrations enabled under the ISA are enabled under the UMSA?	To validate integrations that used Innovation Services, access the All Integration Systems report (secured to the *Integration Reports* domain) to confirm their status.
Is data contribution for Intelligent Application features enabled by default under UMSA?	Workday enables data contribution for Intelligent Application features by default.
How can I opt out of data contribution for Workday AI features?	If you want to disable data contribution, you can use the Data Contribution for Workday AI report (secured to the *Manage: Data for ML Features* and *View: Data for ML Features* domains) to opt out of specific product lines or individual features. Note: • If an Intelligent Application doesn't require data contributions, there's nothing to disable. • Some SKUs (such as Peakon and HiredScore) might not offer the ability to disable data contribution at this level.
How has security configuration changed for AI features under UMSA?	Workday updated the security domains. You must ensure you have enabled the relevant security

	groups and added them to the *Manage: Data for ML Features* and *View: Data for ML Features* domains. These domains replace the previous *Manage: Innovation Services* domain.
How can I see the specific data Workday uses for AI features?	Click View Data Collected on the Data Contribution for Workday AI report (secured to the *Manage: Data for ML Features* and *View: Data for ML Features* domains) to access these details.
How does Workday notify me about new or updated AI features?	If you have enabled notifications about upcoming changes to AI features, Workday sends a 30-day notification before delivering new or updated AI features to your preview and production tenants. See Steps: Set Up Notifications for AI Feature Data Contributions on page 232.
What happened to the Media Cloud Addendum? Does my existing content (like SCORM/AICC files) still work?	Yes, your existing packaged content will continue to operate. The legal and contractual terms have shifted from the old addendum to the relevant terms within the Platform and Product Extensions Product Terms under your UMSA.
What configurations do I need to review for Workday Learning?	If you use third-party content, you must verify your Learner Name configuration to ensure content launches correctly. After transitioning to UMSA, access the Edit Tenant Setup - HCM task and select the Send Learner Name to Third-Party Content Provider check box. See Steps: Set Up Packaged Content for Learning.
How do I submit support requests for subscription management (such as new licenses)?	In Workday Community, route subscription management requests, like new licenses, as a Customer Success Request.

Notifications and Alerts

Steps: Set Up Workday Notifications

Context

You can configure email, mobile push, and SMS notification settings, enabling you to customize how Workday sends notifications for your tenant.

Steps

1. Set Up Mail Servers for Email Notifications on page 260.
2. (Optional) Set up Email Analytics to run on your email notifications.

   See Steps: Set Up Email Analytics on page 274.
3. (Optional) Set Up Mobile Push Notifications on page 191.
4. (Optional) Set up SMS notifications in your Production tenant.

   See Steps: Set Up Workday Messaging on page 296.

5. Create Notification Routing Rules on page 252.
6. Access the Edit Tenant Setup - Notifications task.

   Customize notification settings, such as email compliance and notification delivery.

   Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Related Information

Concepts

Concept: Notifications on page 256

Reference

Reference: Edit Tenant Setup - Notifications on page 107

Steps: Set Up Message Templates

Context

You can create message templates to use as a starting point when configuring various communications in Workday, making it easier to deliver a consistent message to your audience. You can also translate your message templates into different languages, enabling you to provide recipients with messages in their preferred language.

Steps

1. Create Segment-Based Security Groups.

   Create segment-based security groups and grant them access to the *Notification Type Security Segment* segments you want to enable access for.
2. Access the Create Message Template task.

   You can only use a message template for the notification type that you select on the Setup tab.

   Security: *Set Up: Message Templates* domain in the System functional area.
3. (Optional) Access the Translate Message Template task.

   Translate your message template into other languages so that your audience members can receive the message in their preferred language.

   Security: *Data Translation* domain in the System functional area.

Result

You can select the template to use when setting up various communications and change the content for an individual communication. Workday merges the message template content with the active email template for the selected notification type.

If you translate a message template, Workday sends the message in the recipient's preferred language for the Send Message and Create Campaigns tasks, if:

- You translated the message template to the same language.
- The recipient selects a preferred language. Recipients that don't select a preferred language receive the message in the base language of the message template.

For messages sent using the Create Scheduled Distribution task, you must also select the Use Translation check box on the Setup tab of the task.

Create Notification Routing Rules

Prerequisites

Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Context

Routing rules enable you to specify which channels and frequencies Workday uses to send notifications from your tenant. You can reuse a routing rule across different notification types, saving you time and effort.

Steps

1. Access the Create Notification Routing Rule task.
2. (Optional) From the Notification Type Usage prompt, select a notification type for which you want to apply the rule exclusively. Leave blank to be able to use the rule for any notification type.
3. Click Add.
4. As you complete the Channel Frequencies section, consider:

Option	Description
Channel	Select a notification channel that you want the notification type to use.
Default Frequency	Select how frequently you want to send the notification. When you select *Mute* for a notification type, Workday doesn't send a notification to workers when that notification is triggered. However, Workday still displays the notification on a worker's notifications page. When you add a Customer SMTP configuration on a custom business process notification, it uses the From Address in the Customer SMTP configuration as the sent From email in the notification. However, if you configure the custom business process notification to use a routing rule with the default frequency of *Daily*, it uses the From Address in the Default SMTP Configuration instead.
Allowed Frequencies	Select frequencies that your workers can select as their preferred frequency for the notification type on the Change Preferences task. When you select *Mute* as an Allowed Frequency, you enable workers to mute a notification type, even if the Default Frequency is *Immediately* or *Daily*.

5. (Optional) Click Add to create additional frequency rules for another notification channel.

Result

You can select the routing rule from the Rule prompt for notification types in the Notification Delivery Settings section of the Edit Tenant Setup - Notifications task.

Related Information

Reference

Reference: Edit Tenant Setup - Notifications on page 107

Configure and View Alerts

Prerequisites

Security: *Notification Alerts* domain in the System functional area.

Context

You can create a configurable alert based on a *custom report*.

You can set the alert to run:

- Immediately.
- Once at a specified date and time.
- Daily.
- Weekly.
- Monthly.
- With a dependency that you configure based on a trigger.
- On a customized recurring schedule.

You can edit alerts that you create, and you can edit scheduling information for alerts you don't create.

To avoid potential errors, configure alerts for Simple or Advanced report types. Workday alerts don't support:

- Composite reports that contain 2 or more matrix reports.
- Aggregation for matrix reports.

Before migrating reports, consider the downstream impact to edited reports in lower level tenants so that you don't migrate potential issues. Workday recommends that you validate reports after migrating them and consider the downstream impact to alerts and other processes.

A data migration error might occur when you use Object Transporter or a web service to migrate alerts that reference a custom report. This can occur when you edit a custom report and remove a prompt or configure it as Do not prompt at runtime. If you encounter an error when migrating alerts, correct the impacted alerts before attempting to migrate them again. The Object Transporter migration error message provides details on how to resolve the issue.

For alerts with a status of Expired or Suspended, you can edit and save the alert to resolve migration errors. You might need to update the alert's future end date. Example: An expired alert has a Run Frequency of Daily Recurrence. In the Range of Recurrence section of the alert, you update the End Date to be in the future.

If expired or suspended alerts become active after you edit and save it, make sure you set the alert to Suspended before attempting the migration. After the alert successfully migrates to the target tenant, verify the alert is still in Suspended status. If the alerts have an Active status in the target tenant, set them to Suspended.

Steps

1. Access the Configure Alert task.
2. Select a Report Name.

   Select a custom report that returns the objects that you want to create an alert about. When you use a custom report that includes a prompt, you must specify a default value and select the Do not prompt at runtime option on the Prompts tab of the report definition. The *Data Source* and *Primary Business Object* of the custom report determine the Notification Topic that Workday displays on the Alert Notification Details page.

3. As you complete the Alert Configuration tab, consider:

Option	Description
Notification Type	Workday delivers 2 *standard reports* to drive the birthday and anniversary alerts. To use these alerts, you must first copy each associated report to a custom report to use for the alert configuration.
Recipients	Enter email addresses for notifications. By using this option, you authorize Workday to send notifications and reports using a potentially unsecured protocol. You can configure SMPT to protect sensitive information.
Reply To	Enter an email address that recipients can reply to directly from the notification emails.
Notification Subject	Displays as the subject line of the notification.
Body	Details Workday displays each detail as a separate line in the notification message. Alert recipient visibility of fields and Field values is different depending upon the data source: • Prism data source: Visibility determined by the security access of the administrator configuring the alert. • Workday data source: Visibility determined by the security access of the notification recipient. Sort By Select a field to sort attributes by. You can sort only by fields that retrieve attributes. Sorting is based on recipient locale.
Date for Effective Date enabled fields	Enter an effective date that affects only effective-dated fields in the Details grid. Workday alerts recipients about field information updated as of the effective date.

4. When you select a run frequency other than Run Now, schedule the alert on the Schedule tab.
5. As you complete the Schedule tab, consider:

Option	Description
Dependency	Workday displays background processes running in your tenant.

Result

Workday:

- Sends the alert to the specified recipients according to the run frequency that you selected.
- Displays the alert in the Process Monitor report as an *Alert Job* process.

- Sends you a notification if a configurable alert that you initiated doesn't run as scheduled.

Next Steps

Access the:

- View Alerts report to view defined configurable alerts. To suspend an active alert, select Schedule Future Process > Suspend from the related actions menu of the alert. To activate the alert, you can select Schedule Future Process > Activate from the related actions menu of the suspended alert.
- Copy Scheduled Alert task by selecting Reports > Scheduled Future Processes from the related actions menu of a custom report.

Related Information

Tasks

Set Up Mail Servers for Email Notifications on page 260

Concept: Notifications

Workday provides a notification framework that enables you to:

- Specify channels by which Workday delivers notifications to recipients.
- Disable delivery of notifications.
- Enable Workday users to change their own notification delivery settings.

The Edit Tenant Setup - Notifications task enables you to configure notification delivery settings.

You can use Email Analytics for eligible notification types to provide insight into how recipients interact with emails you send from Workday.

Notification Delivery Channels

You can configure Workday to deliver notifications through these notification delivery channels:

- Email. You can set up email notifications to send Daily or Immediately.
- Mobile Push Notifications. Workday sends push notifications through Apple Push Notifications and Google Cloud Messages. Mobile push notifications can only send on an immediate frequency.
- SMS. Workday sends SMS notifications only on an immediate frequency.

Workday uses the primary work email address listed for recipients for email notifications. If there isn't a primary email listed, Workday uses the additional work email address on file. Some notification types might not use this destination priority. Some tasks enable you to prioritize the primary home email address over the primary work email address for certain notification types. Example: Security email notifications configured on the Edit Tenant Setup - Security task.

Parent Notification Types and Individual Notification Types

Workday groups related individual notification types into categories called parent notification types. Each parent notification type can override the delivery configuration for tenant notifications to use a different SMTP server. Each individual notification type can override the notification delivery configuration of its parent.

Email Notification Sending Priority

Workday determines the sending priority of email notifications by looking at their email configurations. From highest priority to lowest, Workday uses the:

- Reply To field in the Override Email Settings section of a custom business process notification.
- Customer SMTP configurations override specified in the Email Configuration prompt in the Override Email Settings section of a custom business process notification.
- Individual notification type set up on the Edit Tenant Setup - Notifications task.

- Parent Notification Type set up on the Edit Tenant Setup - Notifications task.
- Tenant Level Default SMTP Configuration set up on the Edit Tenant Setup - Notifications task.

Daily Digest email notifications don't use the Reply To or Customer SMTP configuration override logic on customer business process notifications. Daily Digest emails use the Daily Digest SMTP Configuration if it's set up. If not, they use the Default SMTP Configuration.

Notification Routing Rules

Routing rules enable you to specify which notification channels and frequencies a notification type can use. The Allowed Frequencies that you define for a notification type on the Create Notification Routing Rule task display as options on the Frequency prompt on these tasks:

- Change Preferences
- Create Workday Account
- Edit Workday Account

If a worker doesn't specify preferences using the Change Preferences task, Workday applies the tenant settings.

Notifications Page

Workday uses the term notifications page to refer to the notifications you receive on the bell icon on your Workday account. Notifications on the notifications page are items that you need to know about that don't require action, including:

- Background notifications. Example: Scheduled reports, reports ready on My Reports, or processes for which you selected Notify Me Later.
- Collaborative alerts. Example: Campaign and engagement plan notices.
- Configurable alerts. Example: Birthdays, time off, and custom alerts.

You can configure Workday to send conversational notifications to My Conversations instead of the notifications page. Example: New messages in Candidate Conversational Messaging for SMS. See Steps: Set Up My Conversations Security on page 302.

You can disable all email, mobile push, and SMS notifications in your tenant on either the General Email Notification Settings or General Notification Restrictions section of the Edit Tenant Setup - Notifications task. Workday still generates notifications on the notifications page for all email and mobile push notifications.

When Workday generates a business process system notification, the notification doesn't display on the notifications page.

View and Maintain Notifications

You can mark notifications on the notifications page as read and use the filter to exclude them from view.

You can use the View and Maintain Notifications task to:

- View read and / or unread notifications for a selected date range.
- Mark specific or all notifications in the results grid as read or unread.

Purge Notifications

You can permanently purge notifications for specific Workday accounts using the Purge Notifications for User task. Use the task to purge notifications on the notifications page, business process and integration notifications, or both. Workday purges:

- Informational notification events only, and doesn't purge actionable items such as approvals, tasks, To Dos, and overdue items.

- Completed business process and integration notifications that are older than 30 days and not displayed on the notifications page.

Related Information

Concepts

Concept: Custom Notifications on page 1100

Tasks

Create Custom Notifications on page 1091

Configure Business Process System Notifications on page 1096

Steps: Set Up Email Analytics on page 274

Reference

Reference: Edit Tenant Setup - Notifications on page 107

Concept: Alerts

You can configure alerts to send relevant business information to users based on conditions for which you can create a report in Workday. You can configure segment-based security to grant access to personal and worker information to members of designated security groups.

Workday uses the filter criteria on the custom report to define conditions to send the alert. Workday doesn't support these filter criteria for alerts:

- Filter on Aggregations
- Subfilters

You can use alerts in areas such as:

- Key metrics reached or milestones met.
- Overdue items.
- Exceptions, such as credit card transactions with no expense reports.
- Birthday and employment anniversary reminders to managers.
- Time Off reminders to your team.

Using Alerts

You can use these Workday reports to create and manage configurable alerts:

- View Alerts report to display details associated with scheduled or run-now alerts.
- Translate Alert Notifications report to add translations to alerts.

Workday delivers these standard reports for birthday and anniversary alerts:

- Anniversaries for this week and next
- Birthdays for this week and next
- My Team Anniversaries
- My Team Birthdays

You can copy each associated report to a custom report that you can use to configure the alert.

Related Information

Tasks

Steps: Set Up Segmented Security for Public Profile Preferences

Configure and View Alerts on page 254

Troubleshooting: Workday for Outlook® Doesn't Respond

Note: The solutions described in this section are not part of the Workday Service. See Legal Notice for details.

This topic provides strategies for resolving why Workday for Outlook® doesn't respond for an individual worker. Provide your employees with these possible solutions.

Note: Workday plans to retire the Workday for Outlook® feature in a future update. To approve time off requests and look up worker information from within Office 365, we recommend using Workday for Microsoft Teams.

Cause: Workers haven't reset their configuration after you disabled and re-enabled Workday for Outlook® for your tenant.

Solution: Workers that aren't able to access Workday for Outlook® can reset the application.

Steps

1. Access the Workday for Outlook Settings report.

   Take note of the Client ID.

   Security: *Workday for Outlook* domain in the System functional area.
2. In Outlook, click Workday on the add-in bar of an email message.
3. On the Welcome to Workday for Outlook® screen, click the settings icon.
4. Click Reset.
5. When prompted, click Reset again.
6. Enter your:
   - Tenant name.
   - Client ID.
   - Workday credentials (if you're not signed into Workday).
7. If prompted, enable Workday for Outlook® to access information in Workday.

Cause: Workday automatically derives and configures additional Workday for Outlook® settings for workers. If Workday can't configure these settings, for example, during a scheduled maintenance window, workers can't use the application.

Solution: If resetting Workday for Outlook® fails to correct the issue, you might want to instruct your workers to configure Workday for Outlook® with additional tenant settings manually.

Steps

1. Access the Workday for Outlook Settings report.

   Take note of these fields:
   - Client ID
   - Authorization URL
   - Workday REST API URL

   Security: *Workday for Outlook* domain in the System functional area.
2. In Outlook, click Workday on the add-in bar of an email message.
3. On the Welcome to Workday for Outlook® screen, click the settings icon.
4. Enter these settings:
   - Client ID
   - Authorization URL
   - Workday REST API URL
5. Click OK.

Email Notifications

Set Up Mail Servers for Email Notifications

Prerequisites

Note: The Workday SMTP now uses Amazon Simple Email Service (SES) to deliver Workday emails. To ensure emails are delivered to their intended recipients, add the *myworkday.com* and *otp.workday.com* domains to your firewall and permit list. See Concept: Amazon SES Email Delivery on page 263 for more information.

Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Context

Simple Mail Transfer Protocol (SMTP) server configurations handle the delivery of various Workday notification emails. You can configure a Default SMTP Configuration for your tenant to use the Workday default configuration or customize your own.

Steps

1. Access the Edit Tenant Setup - Notifications task.
2. From the Default SMTP Configuration prompt, select *Create Email Configuration*.
3. As you complete the task, consider:

Option	Description
Delivery Type	Select: • *Workday SMTP* to use the Workday SMTP server (default). Workday sends emails for this delivery type using the Inbound Email IP addresses listed on the Workday Data Center Articles. • *Customer SMTP* to use an external server. Workday sends emails for this delivery type using Inbound Integrations IP addresses appropriate for your data center and tenant type. You can configure different Customer SMTP configurations to use on custom business process notifications. When you select the Customer SMTP configuration on the notification, Workday displays the From Address you specify in the Customer SMTP configuration as the sent From email address. Workday automatically applies DKIM, DMARC, and SPF protocols to email notifications that use the *Workday SMTP* delivery configuration. If you select *Customer SMTP*, you must set up the protocols manually. When a Customer SMTP fails to send an email notification, it's resent using the Workday SMTP.

Option	Description
Delivery Name	The customer-defined name for the email configuration.
From Mailbox	Enter the name of your base tenant.
From Display Name	Enter a name that contains no more than 40 alphanumeric characters. If the From Display Name is invalid or if you leave it blank, the receiving mail server will most likely display the From Address instead.
Reply To	Enter only 1 valid email address in the standard format in this field. Example: user@domain.net.
Sending Domain	For *Workday SMTP* delivery types, you must use the myworkday.com domain URL. For *Customer SMTP* delivery types, select a Sending Domain Override to use the domain URL of your choice.

4. As you complete the Custom SMTP Settings for *Customer SMTP* delivery types, consider:

Option	Description
Port	Enter the port to use based on your custom SMTP configuration. When you don't enter a port, Workday uses the standard SMTP port (25). Workday does not support port 25 if your company uses a custom SMTP in a Workday public cloud environment. Cloud service providers restrict, or in some cases block, connections to destination TCP port 25 due to the high risk of spam emails generated through that port. Workday recommends that you use port 587, since it supports secure email transmission through encryption protocols.
SMTP OAuth Provider	Microsoft Outlook is the only OAuth option at this time. When you select *Microsoft Outlook*, enter the required information in these fields: • Outlook Client ID • Outlook Client Secret • Outlook Tenant ID • Outlook User ID See OAuth for Email-Out: Example Using Microsoft Azure for information on how to get your OAuth credentials.
Use SSL	Activates an immediate SSL negotiation with the remote custom SMTP server.

Option	Description
Use STARTTLS	Encrypts an insecure connection using SSL negotiations.

If you encounter issues while configuring your Customer SMTP settings, check with your email provider to determine which settings are correct for your Customer SMTP.

Next Steps

Create additional SMTP configurations for your tenant to use for specific notification types. If you don't set a server configuration for a Parent Notification Type, Workday uses the Default SMTP Configuration or Daily Digest SMTP Configuration.

Create Email Templates

Prerequisites

Security: *Set Up: System* domain in the System functional area.

Context

Email templates enable you to define the branding elements, layout, and content to include in various email notifications generated by Workday when required by a business process. Example: Alert notifications and Workday password resets.

Steps

1. Access the Create Email Template task.
2. Define the purpose of the email template by selecting an Email Template Behavior.
3. Add rows for each piece of content to include in the email template.
4. As you complete the task, consider:

Option	Description
Static Content	Static content options are identical for all email template behaviors. *Static Email Content* • Lists all of the defined static content elements (text, hyperlinks, and images) currently available in Workday. *Static Email Text* • Static content that is text only. *Static Email URL* • URLs that display in email templates as links to the web. *Static Embedded Email Image* • Imported images on the email template. Note: If the image filename contains a trademark symbol, Workday doesn't deliver the email. *Static External Email Image*

Option	Description
	• Images from a link to an external source (such as the web).
Dynamic Content	Select from the dynamic content elements available for the email template behavior you selected.

Result

When Workday uses an email template, it constructs the message from the specified elements in order and supplies:

- Static elements as is.
- The value of dynamic items at the time the email sends.

Next Steps

Access the Test Email Template task to test your email template layout with sample values by sending it to a testing email address.

If the email body is empty when the email arrives, there probably isn't an active:

- Template for the particular use.
- Default template.

Either activate or create a template for this use, or activate the default template. Use the Maintain Email Templates task to activate a template or set a template as the default. You should have a Workday-delivered template that works for most uses.

Concept: Amazon SES Email Delivery

This topic provides details on how to ensure workers receive emails from Workday tenants that use Amazon Simple Email Service (SES) to send emails.

Note: The Workday SMTP now uses Amazon Simple Email Service (SES) to deliver Workday emails.

Security

Workday has set up appropriate Sender Policy Framework (SPF) and DomainKeys Identified Mail (DKIM) records for Workday emails from myworkday.com and otp.workday.com, and their related bounce subdomains. Workday has also configured a Domain-based Message Authentication, Reporting & Conformance (DMARC) policy for receiving servers to follow. This policy helps email receiver systems distinguish between legitimate and fraudulent emails. We deliver emails over opportunistic TLS if your mail server supports it.

Workday recommends that you configure your mail servers to check our DMARC policy based on the DKIM and SPF values defined by our Workday sending domains.

Note: Current SPF settings for myworkday.com and its related bounce subdomain use a hard fail, while SPF settings for otp.workday.com and its related bounce subdomain use a soft fail.

Return Path

Workday tracks email bounces using the related subdomains of myworkday.com and otp.workday.com. These subdomains appear in the Return Path of the email headers. The subdomains are different for each Workday data center and region. See the Emails to Allow section for the names of the bounce subdomains for each data center. Mail servers use these subdomains to provide alerts to Workday about email bounces.

Bounce Handling

Amazon SES uses bounce subdomains for enhanced bounce-back monitoring.

When emails soft bounce, or fail temporarily, Workday continues attempting to send them, increasing the delay between each attempt. Emails can soft bounce for many reasons, including internet connectivity issues, target mail server issues, or other temporary problems, so you don't need to take any action.

When emails hard bounce, or fail permanently, Workday stops sending emails to that address, flags it as a bounced email address, and suppresses it. See Concept: Email Deliverability on page 266 for information on the Amazon SES suppression list. Emails can hard bounce for many reasons, including typos in email addresses, former employee email addresses, or incorrect spam rejections. Workday recommends that you review emails that hard bounce and correct their system email addresses to help keep Workday's email reputation high.

Customer Mail Server Configuration

If your company requires the configuration of your mail server through a filter to accept emails form Workday, ensure that it is conditional on:

- Passing SPF and DKIM authentication.
- Verifying DMARC alignment.

These authentication methods ensure that only properly authenticated messages are trusted, reducing the risk of phishing or spoofing.

Amazon SES uses dynamic IP addresses, so instead of adding only individual IP addresses to your firewall and allowlist, Workday recommends that you also add the domains and subdomains listed for your company’s data center to your company's permit list:

Data Center	Email Domains
WD2 - Non-Production and WD1 - Production	• *@us-east-1.bounce.myworkday.com • *@us-east-1.bounce.otp.workday.com • myworkday.com • otp.workday.com
WD3 - Non Production and Production	• *@eu-west-1.bounce.myworkday.com • *@eu-west-1.bounce.otp.workday.com • myworkday.com • otp.workday.com
WD5 - Non Production and Production	• *@bounce.myworkday.com • *@bounce.otp.workday.com • myworkday.com • otp.workday.com
WD10 - Non Production and Production	• *@ca-central-1.bounce.myworkday.com • *@ca-central-1.bounce.otp.workday.com • myworkday.com • otp.workday.com
WD12 - Non Production	• *@bounce.myworkday.com • *@bounce.otp.workday.com • myworkday.com • otp.workday.com
WD12 - Production	• @us-east-1.@bounce.myworkday.com • @us-east-1.@bounce.otp.workday.com • myworkday.com

Data Center	Email Domains
	• otp.workday.com
WD102 - Non Production and Production	• *@ap-southeast-1.bounce.myworkday.com • *@ap-southeast-1.bounce.otp.workday.com • myworkday.com • otp.workday.com
WD103 - Non Production and Production	• *@eu-central-1.bounce.myworkday.com • *@eu-central-1.bounce.otp.workday.com • myworkday.com • otp.workday.com
WD105 - Non Production and Production	• *@ap-southeast-2.bounce.myworkday.com • *@ap-southeast-2.bounce.otp.workday.com • myworkday.com • otp.workday.com
WD107 - Non Production and Production	• *@eu-west-2.bounce.myworkday.com • *@eu-west-2.bounce.otp.workday.com • myworkday.com • otp.workday.com
WD108 - Non Production and Production	• *@us-east-2.bounce.myworkday.com • *@eu-east-2.bounce.otp.workday.com • myworkday.com • otp.workday.com
WD501 - Non Production	• *@us-west-2.bounce.myworkday.com • *@us-west-2.bounce.otp.workday.com • myworkday.com • otp.workday.com
WD501 - Production	• *@us-east-1.bounce.myworkday.com • *@us-east-1.bounce.otp.workday.com • myworkday.com • otp.workday.com
WD502 - Non Production and Production	• *@eu-west-1.bounce.myworkday.com • *@eu-west-1.bounce.otp.workday.com • myworkday.com • otp.workday.com
WD503 - Non Production and Production	• *@us-east-2.bounce.myworkday.com • *@us-east-2.bounce.otp.workday.com • myworkday.com • otp.workday.com
WD104 - Non Production	• *@us-west-2.bounce.myworkdaygov.com • myworkdaygov.com
WD104 - Production	• *@us-east-2.bounce.myworkdaygov.com • myworkdaygov.com

If you don't update your company permit list or firewall with the recommended domains, Workday will still send emails, but your system firewall or spam detection configurations may prevent them from being delivered to their intended recipients or mark them as being from an external sender.

Testing

Workday recommends that you test email delivery by sending test emails to a small group of employees. This approach enables you to troubleshoot if you encounter any issues.

Concept: Email Deliverability

Workday incorporates features that reduce the number of emails sent to invalid email addresses. You can use reports to view unsent emails and to identify invalid email addresses so that you can correct them. These tools help to improve the rate of successful email delivery to email recipients.

Email Block List

Workday uses an email block list to validate recipient email addresses for all emails sent from your Workday tenant, whether you use a Workday or custom SMTP. Workday doesn't deliver emails sent to email addresses that match specific criteria on the block list, such as invalid domains. Workday classifies a domain as invalid if it contains a typo or lacks a mail exchange (MX) record.

Note: When you set up an email redirect restriction on the Edit Tenant Setup - Notifications task, and the email address of the original recipient is invalid, Workday doesn't send an email to the redirect email address.

You can use these reports to view the undelivered email notifications:

Report	Description
Emails Not Sent Due to Blocked List	View the most recent email notifications with email addresses that matched criteria on the blocked list. You can filter the results of the report by date range. You can also determine whether an undelivered email address belongs to a specific contact or a static email address.
Business Process and Integration Notifications Indexed	View all email notifications sent from your Workday tenant. Use the Emails Not Sent Due to Blocked List column to determine whether Workday delivered the email notification or blocked it.

Using these reports, you can identify email addresses in your tenant that you need to update to ensure successful email delivery.

Amazon Simple Email Service Suppression List

When Workday sends an email to a recipient that results in a permanent failure to deliver (permanent bounce), Amazon Simple Email Service (SES) adds the recipient's email address to a suppression list. If Workday attempts to send an email to an address that's on the suppression list, Amazon SES accepts the message, but doesn't send it.

The most common cause for a permanent bounce is when a receiving mail server indicates that an email address doesn't exist in your system. To protect Workday's email reputation and deliverability, ensure that your company doesn't continue to deliver emails to addresses that have permanently bounced.

If you discover that a recipient isn't receiving Workday emails, contact Workday Customer Support to find out if the recipient's email address is on the suppression list. Workday plans to create a report that enables you to check if an email address is on the suppression list in a future release.

If you require a valid email address to be removed from the suppression list, it could take a few days for Workday to remove it. Ensure that you configure your receiving mail servers and email addresses properly or it may lead to email delays.

Note: The Workday SMTP now uses Amazon SES to deliver Workday emails.

Related Information

Reference

Reference: Edit Tenant Setup - Notifications on page 107

Concept: Email Templates

Workday uses email templates to generate email notification content, such as formatting and text. You can define separate email templates for group messaging, benefits open enrollment, Workday password resets, and other purposes.

Static and Dynamic Content in Email Templates

Email template content elements can be:

- Static (text, a URL, or an image file that doesn't change).
- Dynamic (Workday-delivered variables determined from the context when the message sends).

Email Template Behaviors

Email template behaviors enable you to assign a purpose for a given email template. Each behavior contains Workday-delivered dynamic content variables that you can use as elements in email templates. The business process that initiates the email defines the value of each variable. Many variables are available across multiple email template behaviors, but some variables are exclusive to specific email template behaviors. Example: The Collaborative Emails template behavior has the dynamic content of Worker Photo, which isn't available in Default template behavior.

The Default email template behavior:

- Includes dynamic content variables that can handle most use cases for the various notifications generated by Workday. These variables are also available, under different names, in other email template behaviors.
- Uses the variable name format: *Content n*. For custom email templates, Workday displays the standard names. These names refer to the same content element. Example: The *Main Body* variable in the Business Process Email email template refers to *Content 1* in the Default email template.

You might want to use a context-specific template behavior instead of the Default template behavior because you can create custom static text that is context-specific to the behavior. Any email that Workday generates using a given template includes static content. You might want to include static content that is specific to 1 context, but not another. Example: The static content for an Integration Process Event email might not be appropriate for a Benefits Notification email.

While the Default email template behavior can be used for most notifications, these behaviors are specifically used for these notifications types:

Email Template Behavior	Notification Type
Collaborative Emails	• Activity Comments • Share Notifications • Workbook Access Additions • Workbook Access Removals • Workbook Comments • Workbook Conversations
Default	• Customer Central

Email Template Behavior	Notification Type
	• Marketplace Opportunity Promotion
General Notification Emails	Interview Schedule Communications
Job Alerts	Job Alerts - Internal Candidates
Learning Campaign Emails	• Extended Enterprise Campaigns • Learning Campaigns • Learning Expiration Periods
Prism Wbucket Complete Notification Email Template Behavior	Prism Wbucket Complete Notification
Recruiting Communications	• Active Candidates • Recruiting Marketing
Student Engagement	• Academic Advising • Admissions • Financial Aid - Disbursements • Financial Aid - General • Financial Aid - Packages • Student Financials • Student Records • Student Recruiting - Marketing • Student Recruiting - Transactional
Worker Communications	Worker Communications

Maintaining Email Templates

You can use the Maintain Email Templates task to specify which:

- Templates are active for a given behavior.
- Template to use as the default for a behavior that has more than 1 active template.

Workday uses only active email templates when generating email notifications for that behavior. You can create multiple templates for a given behavior, but usually only one can be active at a time. The only exception is the Business Process behavior. Multiple Business Process templates can be active, but only one can be the default. Use the Default check box to select the default template.

Workday uses the Default template for any behavior that doesn't itself have an active template. You can create more than 1 Default template, but only 1 can be active. Custom notifications use the Default template for a given behavior unless you override it with another active template when you create the notification.

Example: Create Email Template for Collaborative Emails

This example illustrates how to enable email notifications for collaborative actions in Worksheets, and how to create an email template using the Collaborative Emails template behavior.

Context

You're setting up Worksheets in your tenant, and you want your users to receive an email notification when they share, unshare, or comment with other users.

You consider the available email templates to use for these notifications and believe that the default email template generates impersonal notifications. You decide to replace the default email template with the collaborative email template to display a photo of the initiator alongside the message and link.

Steps

1. Access the Edit Tenant Setup - Notifications task.
2. In the Notification Delivery Settings section, select the System parent notification type.
3. Enter these settings:

Notification Types		
Workbook Access Additions Workbook Access Removals Workbook Comments Workbook Conversations	Select the Override Notification Parent Type Settings check box.	From the Rule prompt, select a routing rule that enables: • *Email* as a Channel. • *Immediately* as the Default Frequency. Select Create Notification Routing Rule when there aren't any routing rules.

4. Click OK.
5. Access the Create Email Template task.
6. Enter these settings:

Option	Setting
Email Template Name	Enter *Collaborative Notifications*
Email Template Behavior	Select *Collaborative Emails*

7. Click OK.
8. Add 3 rows and enter these settings:

Order	Static Content / Dynamic Content
a	Select *Worker Photo* from the Dynamic Content prompt.
b	Select *Main Body* from the Dynamic Content prompt.
c	Select *Collaborative URL* from the Dynamic Content prompt.

9. Click OK and Done.

Result

When you share, unshare, or tag someone with access to the worksheet in a comment, that person receives an email notification using the Collaborative Email template behavior.

The email notification contains these elements:

- The name of the Worksheet that you shared.
- Your worker photo.
- Body text that you defined.
- URL to the collaborated item.

The Collaborative Email style also applies to Workday notifications.

FAQ: Email Notifications

- What's the size limit for email notifications? on page 270

What's the size limit for email notifications?	Workday doesn't process email notifications larger than 20 MB.
Does Workday notify me if my account expires or locks?	You won't receive most email notifications if your Workday account is expired or locked out. If you enabled notification delivery settings on these tasks, you'll still receive email notifications: • Edit Tenant Setup - Notifications • Edit Workday Account
Why didn't Workday deliver email notifications at the time I configured?	Workday processes email notification requests as soon as resources become available. Availability depends on the third-party email providers and the current load on Workday. We can't guarantee when users will receive notifications.
How do I send a test email notification?	1. Access the Test Email Template task. 2. Select a template and enter a valid email address. 3. Verify that the email address you entered receives the test email. The test also confirms that your email servers are receiving Workday email notifications.
What can I do if an addressee doesn't receive a test email notification?	• Verify that your email provider allows email from the Workday IP addresses. It isn't sufficient for your email provider to include Workday IP addresses on its allowlist. Your email provider must explicitly trust Workday IP addresses. Users can then receive Workday email as a trusted source. See Workday Data Centers for topics regarding each data center and their IP addresses. Note the IP address for *Inbound (email only)*. • You can ask your IT department to check company email logs to see if Workday email is reaching your email server. Verify that the spam filters aren't rejecting Workday email.
Why does a received email notification have missing or incorrect content?	There's no active template for the particular use. 1. Activate or create a template for this usage, or activate the default Workday standard template.

	2. Test the email template by sending a test email notification.
Why does a received email notification include an incorrect date?	The date might be correct, but in a format you aren't expecting. Example: A notification sent on the 6th of May 2020 has the date 05/06/2020 (US format), but you're expecting 06/05/2020 (UK format). To determine the date format to use in email notifications, Workday evaluates these settings in the order listed: 1. The preferred locale of the user. 2. The work locale of the user. 3. The default locale for the tenant. If none of these locales are set, then Workday automatically uses the US date format.

What can I do if employees don't receive Workday email notifications?	• Workday doesn't send email notifications when you:
	    • Clear the Enable Security Emails check box on the Edit Tenant Setup - Security task. Select the check box to enable security-related email notifications.
	    • Select the Disable All Emails option on the Edit Tenant Setup - Notifications task for your OMS environments. For tenants that should be receiving email notifications, remove the restrictions, OMS environments, or both.
	• In the Default Email Settings section of the Edit Tenant Setup - Notifications task, select or create a Default SMTP Configuration for Workday emails. Workday needs a valid Default SMTP Configuration to generate email notifications.
	• Send a test email notification to the email address on the Workday account.
	• Check the employee's junk email folder to verify that Workday isn't filtering email notifications from My Tasks.
	• You can ask your IT department to check company email logs to see if Workday email is reaching your email server. Verify that the spam filters aren't rejecting Workday email.

What can I do if employees don't receive business process email notifications?	• Access the Edit Tenant Setup - Notifications task and verify that email delivery is enabled for these notification types:
	    • Approvals
	    • Custom Business Processes
	    • Tasks
	    • To Dos

	• Check the Workday account for the employee.
	  ◦ Access the Edit Workday Account task and verify that email delivery is enabled for these notification types:
	    ▪ Approvals
	    ▪ Custom Business Processes
	    ▪ Tasks
	    ▪ To Dos
	  ◦ Verify that Email Address for Notifications is a valid email address.
	• Send a test email notification to the email address on the Workday account.
	• Workday sends security email notifications to the option you select for Enable Security Emails on the Edit Tenant Setup - Security task.
	• Review the Business Process and Integration Notifications report for the expected time frame, and locate the notification. Verify that it lists the correct recipient.
	If the report doesn't list the recipient for the notification, verify that the recipient has the assigned role for the business process step.
	• On the Maintain Email Templates task, verify that you selected a valid, active template for the Default or the Business Process Email notifications.
	• Check the employee's junk email folder, and verify that Workday isn't filtering email notifications from My Tasks.
	• Verify that the spam filters for your company aren't rejecting Workday email.

What can I do if employees don't receive integration emails?	• Access the Edit Tenant Setup - Notifications task and check the General Email Notification Settings. Remove any restrictions for your OMS environments that should be receiving email. Workday doesn't send email notifications when you select Disable All Emails for your OMS environments. Remove the restrictions, the OMS environments, or both for the tenant that should be receiving email. • Access the View Integration System report and select the specific integration. Select Integration System Configure > Integration Notifications from the related actions for the integration system. Verify that the recipients listed are correct. • Access the Maintain Email Templates task and verify that the Integration Event Email is valid and active.

	• Check the employee's junk email folder, and verify that Workday isn't filtering email notifications from My Tasks. • Verify that the spam filters for your company aren't rejecting Workday email.

How do I enable employees to receive randomly generated password emails?	Your Workday implementation must use Workday internal security for authentication, not an external LDAP system. Check these settings:
	• In the Security Email Settings section on the Edit Tenant Setup - Security task, select Enable Security Emails.
	• Check the Workday account for the employee.
	    • On the Edit Workday Account task, confirm that the Email Address for Notifications is a valid email address for the worker.
	    • Confirm that the Workday account isn't expired or disabled.
	    • Confirm that Workday hasn't locked the account for excessive failed sign-in attempts.
	    • Confirm that Generate Random Password is selected.
	• Access the Maintain Email Templates task and verify that the Default template is valid and active.
	• Send a test email notification to the email address on the Workday account.
	Workday sends security email notifications to the option you select for Enable Security Emails on the Edit Tenant Setup - Security task.
	• Check the employee's junk email folder, and verify that Workday isn't filtering email notifications from My Tasks.
	• Verify that the spam filters for your company aren't rejecting Workday email.

Related Information

Tasks

Edit Workday Accounts

Reference

Reference: Edit Tenant Setup - Notifications on page 107
Reference: Edit Tenant Setup - Security on page 144
Reference: Edit Tenant Setup - System on page 164
FAQ: Business Processes on page 1201

Email Analytics
Steps: Set Up Email Analytics

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

Workday uses Email Analytics to provide insight into how recipients interact with emails you send from Workday. Email Analytics uses a third-party email subprocessor to send emails and to track the delivery and engagement metrics on email events, including:

- Delivery
- Open
- Click
- Drop / Bounce
- Spam

Workday supports email analytics for:

- The Recruiting Campaigns notification type in the Candidate Engagement service.
- All Learning notification types.
- All Student notification types.

Steps

1. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

   On the Innovation Services Opt-In task, select the Email Analytics service on the Available Services tab in the Cross Application Services category.
2. Edit Domain Security Policies.

   Configure a security policy for the *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.
3. Activate Pending Security Policy Changes.

4. Set Up Email Analytics Sending Domains.
5. Access the Verify Email Analytics Sending Domain task.
   a) Select your sending domain.
   b) Click OK and then click Refresh to see if your sending domain verification is successful.

   Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.
6. Configure Notification Delivery Settings for Email Analytics.

Result

You can view how recipients interact with the emails sent for a specific notification type when you use Email Analytics as the delivery type. Example: You can configure the Recruiting Campaigns notification type to use the email analytics sending domain so that you can track how candidates interact with recruiting campaign emails.

Related Information

Tasks

Steps: Set Up Learning

Set Up Email Analytics Sending Domains on page 275

Configure Notification Delivery Settings for Email Analytics on page 276

Examples

Steps: Set Up Recruiting Campaigns

2024R1 What's New Post: Email Analytics for Student and Learning Notification Types

Set Up Email Analytics Sending Domains

Prerequisites

Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Context

You can use an email analytics sending domain to send email notifications for specific notification types so that you can track delivery metrics for them. Example: Configure the Recruiting Campaigns notification type to use the email analytics sending domain to see how candidates interact with recruiting campaign emails.

To test analytics in a non-Production environment, you must configure a domain and subdomain in that environment. You can retrieve an existing non-Production sending domain after a refresh. The Configure Email Analytics Sending Domain for Non-Production task enables you to load an existing non-Production sending domain onto a non-Production tenant so that you don't need to recreate it.

Steps

1. Access the Create Email Analytics Sending Domain task.
2. As you complete the task, consider:

Option	Description
Subdomain	Enter the subdomain for the Email Analytics domain. Example: Recruiting.
Domain	Enter the domain to use for Email Analytics. Example: Domain.com.

   Example: When your subdomain is Recruiting and your domain is Domain.com, your email analytics sending domain is Recruiting.Domain.com.
3. Click Refresh to display the canonical names (CNAMEs) that you need for your DNS provider configuration on the View Email Analytics Sending Domain report.

Next Steps

- Work with your IT administrator to add the 3 CNAME values in the DNS Records grid to your DNS provider configuration. It can take up to 48 hours for DNS updates to take effect.
- Access the Verify Email Analytics Sending Domain task to verify your sending domain configuration.

Related Information
Tasks
Steps: Set Up Email Analytics on page 274

Configure Notification Delivery Settings for Email Analytics

Prerequisites

- Use the Set Up Email Analytics Sending Domains task to create the email analytics sending domain you want to use for the specified notification type.
- Verify the email analytics sending domain configuration.
- Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Context

You can configure these notification types to use an email analytics sending domain:

- Recruiting Campaigns
- All Learning notification types
- All Student notification types

Steps

1. Access the Edit Tenant Setup - Notifications task.
2. As you complete the Notification Delivery Settings section, consider:

Option	Description
Parent Notification Type	Select from these parent notification types: • Learning • Recruiting • Student
Notification Type	Select the Override Parent Notification Type Settings check box on the individual notification type that you want to associate with the email analytics sending domain. Select from these individual notification types: • Any Learning notification type • Recruiting Campaigns • Any Student notification type
Routing	Select or create a routing rule that enables both *Email* as the Channel and *Immediately* as the Default Frequency.
Delivery Override	Click Add. From the Channel prompt, select *Email*. From the Configuration prompt, select *Create* > *Create Email Configuration*.

3. As you complete the Create Email Configuration section, consider:

Option	Description
Delivery Type	Select *Email Analytics*.
Delivery Name	Enter a name for the delivery type.
Sending Domain	Select the email analytics sending domain that you created.

4. Verify that the email analytics delivery name displays in the Configuration prompt in the Delivery Override section of the individual notification type.

Next Steps

You can now track how recipients interact with the emails you send them for the configured individual notification type.

Related Information
Tasks
Steps: Set Up Email Analytics on page 274

Email Ingestion
Steps: Set Up Email Ingestion

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

You can configure your tenant to receive inbound emails to specific domains for processing with Email Ingestion.

Email ingestion parses inbound email and extracts data, which Workday applications use to create tickets and tasks for particular use cases.

Email ingestion supports:

- Email Case Creation and Case Communication by Email for Workday Help.
- Email Receipts to Workday Expenses.

- Supplier Invoice Optical Character Recognition (OCR): Email Ingestion.

Email ingestion can accept a maximum file size of 30 MB, which includes the email plus attachments.

Steps

1. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

   On the Innovation Services Opt-In task, select the Email Ingestion service on the Available Services tab in the Cross Application Services category.
2. (Optional) Create Segment-Based Security Groups.

   Create a segment-based security group with access to the notification type security segment for processing email content using email ingestion.
3. Edit Domain Security Policies.

   Add new or existing security groups to the *Set Up: Inbound Email* domain in the System functional area.
4. Activate Pending Security Policy Changes.
5. Access the Edit Tenant Setup - System task.

   In the System Setup section, select the Allow Attachments within Emails check box.

   Security: *Set Up: Tenant Setup - System* domain in the System functional area.
6. Configure Email Ingestion Settings.

   Configure email ingestion receiving domains for different notification types.

Result

You can use any email alias with your email ingestion receiving domain. Enter the email alias followed by an @ sign before the receiving domain. Example: Help@Help.GMS.com. Don't set up a mailbox for Help@Help.GMS.com, because the Workday subprocessor creates one automatically. If you set up a mailbox, emails won’t be sent to your receiving domain address in Workday.

Applications associated with the receiving domains initiate actions based on the content of inbound emails. Example: When an authorized vendor submits an email invoice, Workday processes the content into a supplier invoice request.

Next Steps

Access the Inbound Email Ingestions By Date Range report to track the:

- Status of events initiated by inbound emails.
- Type of requests received through the domain.
- Issues that cause email ingestion to fail.

Related Information

Concepts

Concept: Email Ingestion on page 282

Tasks

Configure Email Ingestion Settings on page 280

Reference

2024R1 What's New Post: Workday-Provided Receiving Domain for Email Ingestion

2023R1 What's New Post: Email Ingestion as an Innovation Service

The Next Level: Supplier Invoice Optical Character Recognition (OCR): Email Ingestion

Steps: Set Up Customer-Provided Receiving Domains

Prerequisites

Identify the names of the subdomains that you want to use before setting up your customer-provided receiving domains.

Context

You need to configure a customer-provided receiving domain for email ingestion only if you don’t use the Workday-provided receiving domain. Workday recommends that you use the Workday-provided receiving domain to save time and reduce complexity.

You can create multiple customer-provided email ingestion receiving domains per tenant, but you must use a unique subdomain for each receiving domain across your tenants. Example: If you create a receiving domain of Help.GMS.com in your Preview tenant, you can't use Help.GMS.com in your Production tenant.

To enhance security, all emails sent to an email ingestion receiving domain require at least one valid DomainKeys Identified Mail signature.

Workday recommends that you work with your IT administrator to set up your customer-provided receiving domains.

Steps

1. Access the Create Email Ingestion Receiving Domain task.

   Note: If you want to use the customer-provided receiving domains in Production that you set up in your pre-migration tenant, you must run the Fix Email Ingestion Receiving Domain Configuration task in your Production tenant so that they are available to you.

   a) Enter the subdomain and domain that you want to use for your receiving domain. Example: When your subdomain is Help and your domain is GMS.com, your email ingestion receiving domain is Help.GMS.com. When creating a new receiving domain:

      - Work with your IT administrator to identify the subdomain and domain.
      - Don't use an existing subdomain and domain combination.
      - Configure only 1 subdomain and domain combination for each notification type.
      - Workday recommends that you create more than 1 subdomain and domain combination for testing in different tenants at the same time.

   b) Click Refresh to display the canonical names (CNAMEs) and mail exchange (MX) values that you need for your DNS provider configuration on the View Email Ingestion Receiving Domain report.

   Security: *Set Up: Inbound Email* domain in the System functional area
2. Update your DNS provider configuration with your new email ingestion receiving domain values.

   Work with your IT administrator to add these values on the View Email Ingestion Receiving Domain report to your DNS provider configuration. It can take up to 48 hours for DNS updates to take effect.

   - The 3 CNAME values in the DNS Records grid.
   - The MX record values in the MX Record grid.
3. Access the Verify Email Ingestion Receiving Domain task.

   a) Select your receiving domain.

   b) Click OK and then click Refresh to see if your receiving domain verification is successful.

   If you're unable to successfully verify your email ingestion receiving domain, confirm that the changes to your DNS host completed successfully.

   Security: *Set Up: Inbound Email* domain in the System functional area.

Next Steps

After you successfully verify your customer-provided receiving domain, you can configure it for different notification types. See Configure Email Ingestion Settings.

Related Information

Concepts

Concept: Email Ingestion on page 282

Tasks

Steps: Set Up Email Ingestion on page 277

Configure Email Ingestion Settings

Prerequisites

Security: *Set Up: Inbound Email* domain in the System functional area.

Context

You can configure a notification type to use a specific email ingestion receiving domain. You can use the Workday-provided receiving domain or a verified customer-provided receiving domain.

Workday recommends using the Workday-provided receiving domain because it doesn't require any setup for your company. It also eliminates the additional configuration steps that customer-provided receiving domains need after a non-Production refresh.

Note: When you use the Workday-provided receiving domain, you must reselect it after every non-Production refresh using the Configure Email Ingestion Settings task in your non-Production tenant.

When you use a customer-provided receiving domain, you need to set it up before you can select it in this task. See Steps: Set Up Customer-Provided Receiving Domains.

Steps

1. Access the Configure Email Ingestion Settings task.
2. From the Type prompt, select the notification type you want to link to an email ingestion receiving domain.
3. As you complete the Receiving Domain section, consider:

Option	Description
Receiving Domain Type	Select the receiving domain type that you want to use. • The Use Workday-Provided Receiving Domain option enables you to use a receiving domain that Workday sets up and maintains. • The Use Customer-Provided Receiving Domain option requires you to first set up a custom receiving domain and update the DNS configuration for your company before you can select it.
Receiving Domain	When you select:

Option	Description
	• Use Workday-Provided Receiving Domain, the receiving domain is displayed in this field. You can't make any changes to the Workday-provided receiving domain. • Use Customer-Provided Receiving Domain, you can select your verified receiving domain from this prompt.

You can use any email alias with a Workday-provided receiving domain or a customer provided receiving domain.

4. In the Allowed Senders grid, add a row for each email address from which you want the domain to accept emails.

   The Allowed Senders feature works only with the Supplier Invoice notification type at this time.

Related Information

Concepts

Concept: Email Ingestion on page 282

Tasks

Steps: Set Up Email Ingestion on page 277

Steps: Set Up Customer-Provided Receiving Domains on page 279

Example: Set Up Forwarding in Gmail for Email Ingestion

This example illustrates how to set up email forwarding in Gmail for Email Ingestion in Workday.

Context

You want to use Gmail to forward emails to a configured receiving domain in your tenant so that Email Ingestion can process them. You can use either a Workday-provided receiving domain or a customer-provided receiving domain.

Prerequisites

- Identify the email ingestion receiving domain to forward emails to for processing.
- Security: *Set Up: Inbound Email* domain in the System functional area.

Steps

1. Access the Edit Email Ingestion Settings task.
2. From the Receiving Domain prompt, select the email ingestion receiving domain for forwarding emails.
3. Add these email addresses to the Allowed Senders grid:
   - forwarding-noreply@google.com.
   - Your designated forwarding email address. Example: email@forward.com.
4. Access Gmail.
5. Click Settings > See All Settings.
6. On the Forwarding and POP/IMAP tab, click Add a forwarding address.
7. Enter the receiving domain email address for forwarding emails. Example: email@destination.com.
8. Click Next.
9. Access the Inbound Email Ingestions By Date Range report in Workday for the current date.

10. Retrieve the Gmail confirmation code for your new forwarding address from the receiving domain email address.
11. In Gmail, enter the code in the confirmation code field.
12. Click Verify.

Related Information

Concepts

Concept: Email Ingestion on page 282

Tasks

Steps: Set Up Email Ingestion on page 277

Steps: Set Up Customer-Provided Receiving Domains on page 279

Concept: Email Ingestion

You can use Email Ingestion to parse and extract data from emails sent into Workday. Workday applications can use the extracted data to create tickets and tasks automatically, which saves you time and eliminates manual work. Applications associated with the receiving domains initiate actions based on the content of inbound emails. Example: When an authorized vendor submits an email invoice, Workday processes the content into a supplier invoice request.

Receiving Domain Types

You can configure your Workday tenants to receive inbound emails to specific receiving domains so that Email Ingestion can process them. You can use either a Workday-provided receiving domain or a customer-provided receiving domain for email ingestion. Workday sets up and maintains the Workday-provided receiving domain for you. Alternatively, you must set up and maintain the customer-provided receiving domain yourself. Workday recommends using the Workday-provided receiving domain because it:

- Saves you time by using a receiving domain that Workday configures for you. When you create a customer-provided receiving domain, you must update the DNS configuration for your company, which may require help from your IT team.
- Simplifies non-Production refreshes by eliminating additional configuration steps that customer-provided receiving domains require.

  Note: You must access the Configure Email Ingestion Settings task in your non-Production tenant to reselect the Workday-provided receiving domain after every non-Production refresh.

Forward and Redirect with Email Ingestion

You can forward and redirect emails to either a Workday-provided receiving domain or a customer-provided receiving domain in your Workday tenant. You can use various third-party email clients to forward and redirect emails. Examples:

- Apple Mail
- Google Mail
- Microsoft Outlook

When you configure your email ingestion settings, you can add a forwarding or redirecting email address to the allowed senders list. You can then configure your email client to forward or redirect email to the receiving domain.

Example: You configure a receiving domain in your tenant: email@destination.com. You also set up a forwarding address in your email client: email@forward.com. Your email client then redirects all emails sent to email@forward.com to your receiving domain: email@destination.com.

Note: When you compose an email that you want to forward to an email ingestion receiving domain, add only the forwarding address in the To field of the email. Add any additional recipient addresses in the Cc field so that Email Ingestion can successfully ingest the email.

Steps to Stop Using Email Ingestion

When you want to stop using Email Ingestion, and are using either the Workday-provided receiving domain or the customer-provided receiving domain, you must:

- Delete the email ingestion settings.
- Remove any forwarding rules that you've made.

When you're using the customer-provided receiving domain, you also need to:

- Delete the email ingestion receiving domain.
- Work with your IT administrator to remove email ingestion data from your DNS configuration.

Related Information
Examples
Example: Set Up Forwarding in Gmail for Email Ingestion on page 281

Notification Designer
Steps: Set Up Security for Notification Designer

Prerequisites

- Set up Drive for users who need to create, edit, or view notification templates. See Steps: Set Up Security for Drive.
- Security: *Security Configuration* domain in the System functional area.

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

You can use Notification Designer to create and manage the layout, design, and content of a notification template that you use when sending notifications generated by Workday. A notification template is an alternative to an email template.

Steps

1. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

   On the Innovation Services Opt-In task, select the Notification Designer service on the Available Services tab in the Cross Application Services category.
2. Create Role-Based Security Groups.

   Create unconstrained security groups for Notification Designer administrators and users.
3. Create or edit a security policy for the *Notification Designer* domain in the System functional area.

   Ensure that every user who has access to the *Notification Designer* domain also has access to the *Drive* domain.

   a) Access the View Domain report.
   b) Select the domain from the Domain prompt.
   c) From the related actions menu, select Domain > Create Security Policy, or select Edit Security Policy Permissions if there's an existing policy.
   d) In Report/Task Permissions, add or edit unconstrained security groups.
   e) Select the View and Modify check boxes.
   f) As a related action on the domain security policy, select Domain Security Policy > Enable.
4. Activate Pending Security Policy Changes.

Related Information
Reference
Workday Community: Get to Know Workday Notification Designer

Create and Activate Notification Templates

Prerequisites

Security: These domains in the System functional area:

- Drive
- Notification Designer

Context

You must create a notification template, publish it, and enable it for specific notification types before you can use it in an email notification. Users who have access to a task or business process that sends notifications can view and select only the notification templates that are available for that specific task or business process.

Steps

1. From Drive, select Add New > Notification Template and name the template.
2. Select a layout with the components that you need or build your own.

   Some of the layouts include a data row supported by specific notification categories. Layouts that don't include a data row are supported by all notification categories.
3. Insert content, such as images, text, buttons, data rows, and social media icons, by clicking the + icon along the border of existing content containers.

   Note: Some elements of email notifications (such as text and buttons) might look different to the recipient depending on the email client.

   See Concept: Editing Notification Templates on page 287.

4. (Optional) Add language layouts for the template by clicking Language > Add Language.

   Each layout you add to the notification template inherits the content present in the base layout at the time you add the language. You can customize the content in each layout by manually adding translated text, replacing images, setting fonts, and changing colors. You must add or delete containers and data rows directly from the base layout for changes to apply to all other languages.
5. Click Publish to make the notification template available for use in a new notification.

   You can click Edit and make changes to the template but you must publish the template again to apply those changes.
6. Click Set Category in the Template Details panel to add one or more notification categories and specify the types of notifications that can use the template. If the template includes a data row, only categories that support that data row display.
7. (Optional) Click Maintain (or use the Maintain Notification Templates task) to add or remove the notification categories for multiple templates at a time. If the template includes a data row, only categories that support that data row display.

   A template can be enabled for multiple categories at the same time, and a category can support multiple notification templates at a time.

Result

You can select a notification template from a prompt when sending notifications for the following:

Business Process Custom Notifications:

- Add, Edit, and Copy custom Workflow Notifications.

HCM - Core

- Message Workers task

HCM - Recruiting:

- Invite to Apply, Send Message, Prospect Consent Collection, and Manage Interview Scheduling Settings tasks.
- Manage Recruiting Campaigns in the Candidate Engagement functional area.
- Job Alerts available when using the Internal Career Site and External Career Site tasks.

Student:

- Create Student Message and Edit Student Message tasks.

Related Information
Reference
2023R1 What’s New Post: Enable Notification Designer Templates
2023R2 What’s New Post: Notification Designer for Business Processes

Concept: Notification Designer

Notification Designer enables you to create and manage the layout, design, and content of a notification template that you use when sending notifications for specific tasks and custom notifications for business processes. You can create multiple notification templates for each type of notification and the notification templates can be used as alternatives to an email template.

With Notification Designer, you can create a new notification template from Drive and then:

- Select a prebuilt notification layout or design your own.
- Add text, images, buttons, dynamic data rows, and other content areas, and format those areas.
- Share the notification template with others.
- Collaboratively edit the notification template with others who have edit access.
- Publish a notification template so that it can be used when sending notifications.
- Set notification categories to specify the types of notifications that can use the template.

Dynamic Content in Notification Templates

You can insert various types of dynamic content as data rows in notification templates. The task or business process that initiates a notification determines the values in the data rows when the notification is sent. Because some data rows are exclusive to specific types of notifications, a notification template can include only 1 data row at a time, and the type of data row included determines the type of notification that can use it.

Example: In order for an Invite to Apply task to use a notification template, that notification template must include an Invite to Apply data row. Additionally, a notification template that includes an Invite to Apply data row isn't available for use in any type of notification except one from an Invite to Apply task.

Notification Template File Downloads

You can download a notification template as an NDXF file type and save a local copy of it as a backup. To download the template, from the File menu of a notification template, select Download As > Notification Template (.ndxf). You must be the owner of the template or have Can Edit permission to download it.

A saved NDXF file can be uploaded to a different tenant, if needed. Before you can upload it, access the Edit Tenant Setup - System task. In the System Setup section under File Type Setup Instructions, make sure all file types are supported, or add NDXF to the list of supported file types for that tenant. Then, from Drive in the destination tenant, select Add New > Upload and navigate to the NDXF file.

You can also migrate notification templates and their dependencies between tenants using Object Transporter (OX).

Language Layouts for Translated Content

You can design and customize content for multiple target languages within a single notification template. Select the base language of a notification template when you create it, and after you add content, select Language > Add Language to add a layout you can customize with translated text and images. Languages that are available to add are defined in the Languages section on the *Edit Tenant Setup – Global* task.

Each new layout that you add to the notification template inherits the content present in the base layout at the time you add the language. You can customize the content in each layout by adding translated text, replacing images, setting fonts, and changing colors. You must add new containers and data rows directly to the base layout for changes to apply to all other languages.

When a notification template is published, all of the language layouts are published too. If you don't add a layout for a recipient's language in the notification template, notifications will be sent using the base language.

Related Information

Tasks

Steps: Set Up Drive on page 411

Concept: Managing Notification Templates

This table summarizes some of the actions that you can take with notification templates. Users must have access to the *Drive* domain to create, copy, share, and delete notification templates.

Action	Description
Create a notification template	From Drive, select Add New > Notification Template.
Copy a notification template	From Drive, select the notification template and click Make a Copy. Copying a notification template from Drive creates a new, unpublished template.

Action	Description
Share a notification template	From Drive, or from an open notification template, select Share. When you share a notification template you can: • Enable link sharing and provide the URL to multiple users at once. • Select specific users, or groups, to share with. • Select a permission level for the actions that users can do. Note: The ability to use group sharing is a system setting that requires additional Drive configuration. When you share a notification template with a specific user, Workday sends a notification and an email (if the Workday administrator enabled email notifications). When you enable link sharing and provide a URL, or when you share with a group, Workday doesn't send notifications.
Remove (move to Trash) a notification template	From Drive, select the notification template and click Remove. You can't permanently delete notification templates; they remain in Trash. Removing a notification template from Drive won't delete the published version of the template. Note: If you move a notification template to Trash you can no longer edit it, enable it for notification categories, configure it for use in notifications, or select it for ad hoc messages such as Invite to Apply and Send Message. However, templates previously configured in instances such as Job Alerts and custom notifications for business processes will continue to use the published template unless you replace it with a different notification template.
Restore a notification template from Trash	From Trash in Drive, select the notification template and then click Restore. Workday places the restored notification template in My Files. You can restore a notification template only if you're the person who created it. If you remove a notification template that was shared with you but you're not the owner, you remove your access to the notification template. The notification template disappears from Drive and it doesn't display in Trash.

Related Information
Tasks
Set Up Group Sharing for Drive on page 414

Concept: Editing Notification Templates

This table summarizes some of the actions that you can take within notification templates. Users must have access to the *Notification Designer* domain to create, edit, publish, and activate notification templates.

Note: Each language instance of a notification template has a size limit of 200KB. When you exceed this limit, Notification Designer prompts you to decrease the size before it can save the instance. Notification Designer doesn't restrict image size. Example: A template instance of 199KB that also includes a 2MB image is within acceptable limits.

Action	Description
Select a template layout	You can select a layout with the components you need or build your own. Some of the layouts include a data row supported by specific notification categories.

Action	Description
Add message content	You can't add message content directly in a notification template, but you can manage the font, text color, and link color in the Settings panel. You can create message information in the Message Template (for Recruiting tasks) and the Message Body (for custom business process notifications). Workday populates the Message Body Placeholder container with the message template or body text when sending a notification.
Edit the default font and color	You can change the font and the default text, link, and background colors for the notification template in the Settings panel.
Create a content container	Hover over an existing content container and click the + icon on the top, bottom, left, or right border. To delete a content container, hover over it and click the trash can.
Move a content container	Hover over an existing content container, click the Move icon, and drag it to an available, highlighted location. When moving content in a data row, all containers in the row move together.
Add a header or footer	To create a header, hover over a content container and click Image or Text. You can't add a footer directly in a notification template. You create footer information in the Email Compliance section of the Edit Tenant Setup - Notifications task.
Add an image	Hover over a content container, click Image, and navigate to the image. Use the Image Properties panel to resize the image, add a link, or add color. Image file types .jpeg, .jpg, and .png are supported. Images are limited to 1 MB in size.
Add text	Hover over a content container, click Text, and type the text to add. Use the toolbar and the Text Properties panel to select styles, formats, bullets, numbers, links, and colors.
Add a button	Hover over a content container and click Button. Use the Button Properties panel to select the button shape, color, and link.
Add a data row for dynamic content	Hover over a content container, click More, and select a type of data row. Use the Button or Text Properties panel to select button shape, formats, and colors. A notification template can include only 1 data row at a time.
Add social media icons	Hover over a content container, click More, and select Social Icons. Use the Social Icons panel to show or hide specific icons and add links. A notification template can include only 1 set of social media icons at a time.
Add a divider	Hover over a content container, click More, and select Divider. Use the Divider panel to select the line style, color, and weight.

Action	Description
Publish a notification template	Click Publish to make the notification template available to be used in a notification. To edit a published notification template, click Edit. Click Publish again to apply changes and have them take effect. Published versions of notification templates can differ from the notification templates in Drive that have saved changes.
Preview a notification template	Click Preview and select either the desktop or mobile icon to preview notification template content before you send it to recipients. Use the View Published toggle to compare content edits to the published version of the template.
Enable notification categories	Click Set Category to manage notification categories for a published template. You can either add categories or remove categories previously set. If the template includes a data row, only categories that supports that data row display. You can also click Maintain (or use the Maintain Notification Templates task) to set categories for multiple templates at a time. Notification templates with a data row can only be enabled for the notification types that support that data row.

Reference: Notification Template Actions Available Based on Permissions

This table summarizes the actions available for notification templates based on the user's permission level. You specify permission levels when you share a notification template.

Action	Can View Permission	Can Edit Permission	Owner
View a notification template.	X	X	X
Copy a notification template. (Applies to Can View permissions only if the notification template owner selected the Commenters and viewers can copy, download, and print option when sharing the notification template.)	X	X	X
View a list of specific users the notification template is shared with.	X	X	X
Remove (self) from shared notification template access.	X	X	
Share a notification template or change share permissions. (Applies to Can Edit permissions only if the notification template owner selected the Editors can share option when sharing the notification template.)		X	X
Edit content.		X	X
Rename a notification template.			X
Remove a notification template and restore it from Trash.			X

Workday Messaging

Setup Considerations: Workday Messaging

You can use this topic to help you make decisions when planning your configuration and use of Workday Messaging. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Workday Messaging provides a channel for SMS notifications, enabling you to communicate with internal and external recipients who have opted in to receive SMS messages. You can use Workday Messaging for custom business process notifications and for specific notification types in these product areas:

- Benefits
- Expenses
- HCM
- Recruiting
- Student

Business Benefits

By using Workday Messaging, you can:

- Increase communication efficiency by reaching recipients quickly and directly.
- Conduct interactive conversations with candidates to improve engagement.
- Reach specific populations with ad hoc SMS messages.
- Keep recipients informed using their preferred communication channel.
- Reach recipients who don't have a dedicated computer.

Use Cases

As an administrator for:

- Business processes, you can configure custom business process notifications to send SMS messages to students, workers, and candidates.
- HR, you can send ad hoc SMS messages to workers.
- Benefits, you can send SMS messages to workers related to their benefits, including open enrollment reminders.
- Expenses, you can send SMS messages to workers regarding expense submission, including how to send receipts.
- Student, you can send SMS messages regarding academic advising, financial aid, student financials, and student records to matriculated students.

As a recruiter, you can send:

- SMS messages to specific prospects and candidates inviting them to apply for a job.
- Recruiting messages to candidates and receive timely responses using Candidate Conversational Messaging for SMS.
- Personalized or predefined SMS messages to candidates from their candidate profiles to keep them informed throughout the hiring process.

- Reminders of upcoming interviews.
- Updates on application status.

Questions to Consider

Questions	Considerations
What types of messages do you want to send using SMS?	You can configure message templates and custom business process notifications for your SMS notifications. You can also send recipients ad hoc messages from their candidate profiles. You can’t add the SMS channel to existing message templates. You need to create new message templates to add SMS.
How do you measure SMS activity?	You can view the SMS message count across all tenants by running the View SMS Usage Metric task. Workday includes all incoming and outgoing messages across all tenants in your SMS message totals. The message count includes opt-in and opt-out messages. Workday Messaging splits any message that exceeds 160 characters into multiple message segments, each of which counts toward your message totals.
How do you test the SMS notification functionality in a non-Production tenant?	Configure Workday Messaging in your Production tenant first before you configure Workday Messaging in a non-Production Tenant. See Steps: Set Up Workday Messaging on page 296. When your Workday Messaging Production configurations complete successfully, you can configure Workday Messaging in a non-Production tenant, and then begin testing. See Configure Messaging for Non-Production Tenant.
How do you ensure that you don't send live SMS notifications to recipients while testing in a non-Production tenant?	You can configure SMS notification restrictions to disable notifications or redirect notifications for testing purposes to a particular: • Contact. • Mobile phone number, including country code.
How do you want to view your SMS notification history?	You can view historical SMS messages on the: • Activity Stream. • All Outbound SMS Notifications report. • Business Process and Integration Notifications Indexed report. • Candidate Communication report. • Recruiting History report.

Recommendations

Test each configured SMS notification in a non-Production tenant using a redirect restriction to prevent accidentally sending messages to candidates.

Requirements

Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

Limitations

Workday Messaging is available for:

- Customers who have a live Production tenant.
- Mobile phone numbers in:
    - Australia
    - Canada
    - Denmark
    - Finland
    - Sweden
    - United Kingdom
    - United States

Workday Messaging doesn't support:

- Attachments or rich-text formatting in SMS messages.
- Mobile phone numbers with extensions.

Tenant Setup

You can use Edit Tenant Setup – Notifications to:

- Enter your customer name.
- Customize your terms and conditions.
- Create notification routing rules for SMS messages.
- Set up SMS notification restrictions to disable notifications or redirect notifications for testing purposes to a particular:
    - Contact.
    - Mobile phone number, including country code.

Security

You can configure these domains in the System functional area:

Domain	Considerations
Business Process Administration *Manage Business Process Definitions*	Users with access to both domains can copy, create, delete, and edit custom business process notifications.
Manage: Innovation Services	Enables you to opt in to the Workday Messaging service using the Innovation Services and Data Selection Opt-In task.
Manage SMS	Secures tasks and reports that enable you to view SMS records, including: • Changes to the terms and conditions.

Domain	Considerations
	• Opt-in and opt-out history. • Sending history.
Messaging Opt-In/Opt-Out	Enables you to initiate the opt-in/out-out process for groups of workers, candidates, students, or student applicants on behalf of the recipient.
Set Up: Message Templates	Enables you to create SMS message templates.
Set Up: Tenant Setup - BP and Notifications	Enables you to: • Select your default SMS configuration. • Create your terms and conditions. • Set up SMS redirect restrictions. • Configure routing rules for your channels.

Business Processes

When you configure custom business process notifications, keep in mind:

- The volume of notifications in the candidate experience.
- The SMS message limits for your company. Workday Messaging splits any custom business process notification that exceeds 160 characters into multiple message segments. Each segment counts toward your message totals.

Reporting

Reports	Considerations
All Outbound SMS Notifications	View all outbound SMS notifications within a specified date range. Details include sender, recipient, phone number, message text, and business process type.
Business Process and Integration Notifications Indexed	View all notifications for the specified period. Details include the time, subject, message, and recipient of each notification.
Innovation Services Summary	View service opt-in status, last-modified information, and the Innovation Services descriptions from Workday Community.
Maintain Workday Messaging	View the date submitted and configuration status for each one-way and conversational messaging configuration.
SMS Opt In and Opt Out Activity	View SMS opt-in and opt-out records within a selected timeframe.
SMS Terms and Conditions History	Track when the terms and conditions changed and who changed them.
View One-Way Messaging Configuration	View the configuration details and the Production and non-Production phone numbers for the one-way messaging configuration for each country. Click the View button from the Maintain Workday Messaging report to access the View One-Way Messaging Configuration report.

Reports	Considerations
View Conversational Messaging Configuration	View the configuration details and the Production and non-Production phone numbers for the conversational messaging configuration for each country. Click the View button from the Maintain Workday Messaging report to access the View Conversational Messaging Configuration report.
Candidate Communication	View messages sent to candidates on the candidate profile.
Find Candidates	View information about prospects, active candidates, and workers, such as candidate skills and jobs applied for. You can also manually send SMS messages to candidates.

Integrations

No impact.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Concepts

Setup Considerations: Worker Messaging

Concept: Candidate Conversational Messaging for SMS

Tasks

Steps: Set Up Workday Messaging on page 296

Steps: Set Up SMS Notifications for Candidates

Manage SMS Preferences for Candidates

Reference

Reference: Edit Tenant Setup - Notifications on page 107

2024R1 What's New Post: Workday Messaging Service Configuration and UK Expansion

2024R1 What's New Post: Candidate Conversational Messaging for SMS

2024R1 What's New Post: Worker Messaging

2022R2 What's New Post: Workday Messaging as an Innovation Service

The Next Level: Prepare for Workday Messaging

The Next Level: Deploying Workday Messaging

Steps: Manage SMS Opt-In Preferences for Groups of Users

Prerequisites

Security: *Custom Report Creation* domain in the System functional area.

Context

You can manage SMS messaging consent for multiple users simultaneously by adding the Mass Action - Messaging Opt-In to specific reports. This mass action enables you to initiate the process of opting in to or opting out of SMS messages for groups of users.

After you complete the steps to set up the mass action, you can use the messaging opt-in mass action on the report repeatedly to initiate the opt-in/opt-out process for additional users.

Steps

1. Edit Domain Security Policies.

   Configure a security policy for the *Messaging Opt-In/Opt-Out* domain in the System functional area with Modify permissions.
2. Access the report to which you want to add the SMS opt-in mass action.

   Select from these reports:

   - Find Workers: Security: *Search: Find Worker* domain in the Worker Profile and Skills functional area.
   - Find Students: Security: *Reports: Students* domain in the Student Core functional area.
   - Find Candidates: Security: *Find Candidates: Internal and External* domain in the Recruiting functional area.
   - Find Student Prospects: Security: *Student Prospect Records* domain in the Student Recruiting functional area.
   - Find Academic Records: Security: *Reports: Academic Records* domain in the Student Records functional area.
3. Create a copy of the report.

   Example: Find Workers - SMS Opt-In.

   See Copy Reports. If you already have a customized version of the report, you can edit that one instead.
4. Add the messaging opt-in mass action to the copy of the report.
   a) On the Advanced tab, add a row to the Mass Action grid.
   b) In the Mass Action field, select the Mass Action - Messaging Opt-In option for the specific report.

      Example: Mass Action - Messaging Opt-In for Workers.
   c) In the Name field, enter the name that you want to display on the mass action button on the report.

      Example: Mass Opt-in.
   d) Click OK.
5. Access the report again to run the messaging opt-in mass action.
   a) Select the users that you want to opt in to or opt out of SMS messages.
   b) Click the SMS opt-in mass action button.

      The button name is customer defined. Example: Mass Opt-In.
   c) On the Messaging Opt-In Mass Action task you have two options:

      - Select Send SMS Opt-In to initiate the opt-in process for the selected users.
      - Select Opt-Out SMS to initiate the opt-out process for the selected users.
   d) Select the Confirm check box, and then click OK.

Result

The Messaging Opt-In Mass Action task displays both the number of users that the mass action:

- Processed successfully.
- Didn’t process due to errors.

You can click the number of users that the mass action didn’t process to view the reasons for the processing errors. The users who Workday processed successfully receive a text message initiating the opt-in/opt-out process for Workday SMS messages.

Steps: Set Up Workday Messaging

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

- Create a privacy policy for your company that complies with A2P 10DLC campaign approval requirements to ensure approval of your messaging campaign registration. See Concept: Workday Messaging U.S. Configuration on page 302 for privacy policy guidelines.
- Review setup considerations for Workday Messaging.

Context

You can communicate with internal and external users through text messages by setting up SMS notifications and conversational messaging. Workday Messaging currently supports:

- One-way SMS notifications for specific notification types and all custom business process notifications.
- Two-way conversational messaging for the Candidate Conversational Messaging for SMS feature.

Workday Messaging is available for mobile phone numbers in:

- Australia
- Canada
- Denmark
- Finland
- Sweden
- United Kingdom (UK)
- United States (U.S.)

You can have an active SMS phone number for each country that Workday Messaging supports.

Set up Workday Messaging in your Production tenant before configuring it in a non-Production tenant. It can take up to:

- 24 hours for a one-way messaging configuration in Canada, Denmark, Finland, and Sweden to complete. The conversational messaging configuration can take an additional 24 hours to complete.

- 30 days for a one-way messaging configuration in the U.S. to complete due to the time required for the third-party Application-to-Person (A2P) registration process. The conversational messaging configuration can take an additional 30 days to complete.
- 7 days for a one-way configuration in Australia and the UK to complete due to the time it takes to review the regulatory bundle and provision a phone number. The conversational messaging configuration can take an additional 24 hours to complete.

Steps

1. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

   On the Innovation Services Opt-In task, select the Workday Messaging service on the Available Services tab in the Cross Application Services category.
2. Edit Domain Security Policies.

   Configure a security policy for the *Manage SMS* domain in the System functional area.
3. Activate Pending Security Policy Changes.
4. Configure One-Way Messaging for Production Tenant.

   Set up one-way messaging in your Production tenant for 1 or more countries and acquire Production and non-Production phone numbers for sending SMS messages.
5. (Optional) Configure Conversational Messaging for Production Tenant.

   Set up conversational messaging in your Production tenant for 1 or more countries and acquire Production and non-Production phone numbers for Candidate Conversational Messaging for SMS.
6. Access the Edit Tenant Setup - Notifications task.

   In the SMS Compliance section, enter your customer name and the terms and conditions for SMS recipients.

   Security: *Set Up: Tenant Setup - BP and Notifications* in the System functional area.
7. Create Notification Routing Rules.

   Configure a routing rule that specifies SMS as the channel for the notification type for which you want to make SMS messages available.

8. Access the Edit Tenant Setup - Notifications task again.

   Set up SMS notifications for any of these individual notification types:

   - Benefits:
     - Benefits Notifications
     - Open Enrollment for Benefits
   - Business Processes:
     - Custom Business Process Notifications
   - Expenses:
     - Expenses SMS Messages
   - HCM:
     - Ad Hoc Worker Communications
   - Recruiting:
     - Active Candidate
     - Candidate Reminders
     - Recruiting Marketing
   - Student:
     - Academic Advising
     - Admissions
     - Financial Aid - General
     - Student Financials
     - Student Records
     - Student Recruiting - Marketing
     - Student Recruiting - Transactional
9. Configure Messaging for Non-Production Tenant.

   Enable one-way and conversational messaging configurations in your non-Production tenant for testing.

Next Steps

Access the:

- All Outbound SMS Notifications report to view all SMS notifications sent from a tenant during a specific date range.
- SMS Terms and Conditions History report to view when the terms and conditions changed and who changed them.

Related Information

Concepts

Setup Considerations: Workday Messaging on page 290

Tasks

Create Student Messages

Customize Expenses Hub Card

Set Up Benefits Messaging

Steps: Set Up SMS Notifications for Candidates

Reference

Reference: Edit Tenant Setup - Notifications on page 107

Configure One-Way Messaging for Production Tenant

Prerequisites

Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Context

You can have 1 active one-way messaging configuration for each country that Workday supports.

Your one-way SMS configurations need to complete successfully before you can run your conversational messaging configurations. You can view the statuses of your configurations on the Maintain Workday Messaging report.

Depending on the country, it can take up to:

- 24 hours for a one-way messaging configuration in Canada, Denmark, Finland, and Sweden to complete.
- 30 days for a one-way messaging configuration in the U.S. to complete due to the time needed for the third-party Application-to-Person (A2P) registration process.
- 7 days for a one-way messaging configuration in Australia and the UK to complete due to the time needed to review the regulatory bundle and provision a phone number.

Steps

1. Access the Maintain Workday Messaging report.
2. In the One-Way Messaging Configuration section, click Configure One-Way Messaging.
3. As you complete the One-Way Messaging Configuration section:

   From the Country of Configuration prompt, select the country for which you're creating a one-way messaging configuration.

   - For Canada and the U.S., enter the area code you want your SMS phone number to have. If the area code isn't available, Workday tries to secure the next available area code.
   - Additionally, for the U.S., complete the Company Information section. To get the best possible Trust Score and the highest Application-to-Person (A2P) messaging limits, ensure that your company information details match the information filed with your Employer Identification Number (EIN).
   - For Australia, Denmark, Finland, and the UK, complete the required fields in the Business Information, Addresses, and Supporting Documents sections to create the regulatory bundle required to obtain a mobile phone number for SMS messaging.

     For descriptions of required information and the documents required for the regulatory bundle, see the Requirements section. Upload supporting documents one at a time. The file size limit for each document is 5 MB. Acceptable document formats include:

     - JPEG and JPG
     - PNG
     - PDF

     Access the Edit Tenant Setup - System task to specify the file types you can upload into Workday.

Result

On the Maintain Workday Messaging report, you can click View to display the configuration details and phone numbers assigned to each country configuration. When the Configuration Status column displays *Success* for a country, its configuration is complete. One-way messaging uses a single phone number for each country configuration.

Next Steps

When you complete the Configure One-Way Messaging task for publicly-traded, for-profit U.S. companies, the Workday Messaging subprocessor sends the brand representative you entered in the Company Information section a two-factor authentication email. The brand representative must verify their identity by clicking the link in the email within 7 days. Private and not-for-profit U.S. companies don't receive a two-factor authentication email, even though they're also required to enter a brand representative.

If your one-way messaging configuration fails to complete, ensure that the company information that you entered is accurate and run it again. Each time you rerun a Workday Messaging configuration, Workday removes any existing delivery overrides associated with the SMS channel in your routing rule. You need to set up delivery overrides again for your phone numbers on the Edit Tenant Setup - Notifications task.

When your one-way configurations are complete on your Production tenant, you can:

- Configure Conversational Messaging for Production Tenant on page 300.
- Configure Messaging for Non-Production Tenant on page 301.

Related Information

Concepts

Concept: Workday Messaging U.S. Configuration on page 302

Tasks

Steps: Set Up Workday Messaging on page 296

Reference

Reference: Edit Tenant Setup - Notifications on page 107

Reference: Edit Tenant Setup - System on page 164

Configure Conversational Messaging for Production Tenant

Prerequisites

- Configure One-Way Messaging for Production Tenant on page 299.
- Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Context

You can have 1 active conversational messaging configuration for each country that Workday supports.

A U.S. one-way messaging configuration can take up to 30 days to complete, due to the time needed for the third-party Application-to-Person (A2P) registration process. A U.S. conversational messaging configuration can take up to 30 more days to complete.

Conversational messaging uses a pool of 25 phone numbers. Workday Messaging uses sessions to pair 2 individuals in a conversation and assigns a proxy phone number for them to use from the pool of numbers. This process ensures that both participants can text without sharing their real numbers.

Steps

1. Access the Maintain Workday Messaging report.
2. In the Conversational Messaging Configuration section, click Configure Conversational Messaging.
3. From the Country of Configuration prompt, select the country for which you want a pool of phone numbers for conversational messaging.

Result

On the Maintain Workday Messaging report, you can click View to display the configuration details and phone numbers assigned to your conversational messaging configurations.

Next Steps

Configure Workday Messaging for non-Production on the Maintain Workday Messaging task in your non-Production tenant.

Related Information
Tasks
Steps: Set Up Workday Messaging on page 296

Configure Messaging for Non-Production Tenant

Prerequisites

- Configure Workday Messaging in your Production tenant.

  See Steps: Set Up Workday Messaging on page 296.
- Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Context

You can configure Workday Messaging in a non-Production tenant to use for testing.

When you configure one-way and conversational messaging in Production, Workday Messaging acquires both Production and non-Production phone numbers for your company. When you configure one-way and conversational messaging in a non-Production tenant, you enable your non-Production phone numbers in your non-Production tenant. Workday expects it to take fewer than 24 hours for all of your one-way and conversational messaging configurations to complete.

You can test on only 1 non-Production tenant at a time. After every refresh on the tenant that you use for testing, you must configure Workday Messaging for non-Production again.

Steps

1. Access the Maintain Workday Messaging report on the non-Production tenant where you want to test Workday Messaging.
2. In the One-Way Messaging Configuration section, click Configure One-Way Messaging.
3. Select the Confirm check box to enable one-way messaging configurations in your non-Production tenant.
4. In the Conversational Messaging Configuration section, click Configure Conversational Messaging to set up Workday Messaging for Candidate Conversational Messaging.
5. Select the Confirm check box to enable conversational messaging configurations in your non-Production tenant.

Result

On the Maintain Workday Messaging report, click View to display configuration details and the phone numbers assigned to your conversational messaging configurations.

- One-way messaging uses a single phone number for each country configuration.
- Conversational messaging uses a pool of 5 phone numbers for each country for testing in non-Production. Workday Messaging uses sessions to pair 2 individuals in a conversation and assigns a proxy phone number for them to use from the pool of numbers. This process ensures that both participants can text without sharing their real numbers. Workday closes conversations in non-Production after 6 hours.

Next Steps

Access the Edit Tenant Setup - Notifications task to configure SMS notification restrictions to disable notifications or redirect notifications to a particular:

- Contact.
- Mobile phone number.

When you redirect SMS notifications to a specific contact or phone number for testing in a non-Production tenant, Workday won't send live SMS notifications to recipients. See Reference: Edit Tenant Setup - Notifications on page 107.

Concept: Workday Messaging U.S. Configuration

To configure Workday Messaging for the United States, you first need to run the Configure One-Way Messaging task. When you submit the U.S. messaging configuration information for your company through Workday, it goes to our messaging subprocessor for initial vetting. Next, it goes to The Campaign Registry (TCR) for validation through the Application to Person (A2P) 10-digit long code (10DLC) system. A2P 10DLC messaging ensures that all traffic to U.S. phone numbers is verified and consensual.

The A2P 10DLC registration process takes place outside of Workday and includes registering a:

- Customer Profile and A2P Trust Bundle.
    - The Customer Profile requires information to validate your business identity, including legal business name, business type, and Tax ID.
    - TCR requires the details from your Customer Profile to determine your trust score.
- Brand, which identifies your company to the carrier networks so they know that your company is a legitimate sender.
- Campaign, which includes providing:
    - The use cases of the types of messages your company wants to send.
    - Information about how end users can opt in and opt out.

TCR can take up to 30 days to complete this process. You can view your one-way messaging configuration status on the Maintain Workday Messaging task.

Privacy Policy Guidelines

When you fill out the Company Information section on the One-Way Messaging Configuration task for the U.S., you must add a link to the privacy policy for your company. Use a privacy policy that complies with these A2P 10DLC campaign approval requirements to ensure approval of your messaging configuration:

- You don't share mobile information with third parties or affiliates for marketing or promotional purposes.
- You do permit sharing information to subcontractors in support services, such as customer service.
- All other use case categories exclude text messaging originator opt-in data and consent. You don't share this information with any third parties.

My Conversations

Steps: Set Up My Conversations Security

Prerequisites

Ensure users have access to the Workday applications that use conversational notifications.

Note: At this time My Conversations supports only Candidate Conversational Messaging for SMS. To receive notifications in My Conversations for Candidate Conversational Messaging for SMS, Workday Recruiting customers must purchase Workday Messaging.

Context

My Conversations enables you to view your conversational notifications and to access full conversations in the Workday application where the conversation is occurring.

You must configure the My Conversations security policy so that:

- Users can see the My Conversations icon in the global header.
- Workday delivers conversational notifications to My Conversations.

Steps

1. Edit Domain Security Policies.

   Add the security groups in the *Manage: Candidate SMS Conversations* domain in the Recruiting functional area to the *My Conversations* domain in the System functional area with Modify permissions.
2. Activate Pending Security Policy Changes.

Result

Recruiters can view conversational notifications from Candidate Conversational Messaging for SMS in My Conversations rather than on the notifications page (bell icon).

Related Information
Tasks
Steps: Set Up Conversational Messaging for Candidates

Concept: My Conversations

My Conversations enables you to view your conversational notifications in a centralized location in Workday. A conversational notification is a type of notification tied to a specific Workday application that notifies you about new messages in your conversations.

Example: Using the Candidate Conversational Messaging for SMS feature, a recruiter has an SMS conversation with a candidate about a job application. When the candidate sends a message to the recruiter, Workday sends a conversational notification to My Conversations for:

- All participants in the SMS conversation.
- The primary recruiter.
- Any additional recruiters on the job requisition.

Everyone who receives the conversational notification can view a preview of the message in My Conversations or access the full conversation within the recruiting Collaboration Panel.

Note: At this time, My Conversations supports only Candidate Conversational Messaging for SMS. You must add the security groups in the *Manage: Candidate SMS Conversations* domain in the Recruiting functional area to the new *My Conversations* domain in the System functional area with Modify permissions for them to see the My Conversations icon.

Access to Conversations

You can access My Conversations by clicking the My Conversations icon in the Workday global header. From the My Conversations panel that displays, you can:

- View a list of your active conversations. Conversations display in My Conversations for 30 after the last message in the conversation was sent. Each conversation in the panel includes:
  - The number of unread messages in the conversation.
  - The Workday application where the conversation is occurring.
  - The names of the message senders.
  - A preview of the most recent message in the conversation.

- Click an individual conversation to view the full conversation within the originating application. From the originating application, you can:
  - View the full history of the conversation.
  - Send and reply to messages.

Related Information
Concepts
Concept: Candidate Conversational Messaging for SMS
Examples
2025R2 Feature Release Note: My Conversations

Message Builder

Steps: Set Up Message Builder

Prerequisites

- Set up Notification Designer. See Steps: Set Up Security for Notification Designer.
- Set up Workday Notifications. See Steps: Set Up Workday Notifications.

Context

You can use Message Builder to create templates for consistently communicating with your audience across various notification delivery channels.

Steps

1. Create Segment-Based Security Groups.

   From the Access to Segments prompt, select Notification Type Security Segment, then any applicable segments.
2. Edit Domain Security Policies.

   Configure the *Message Builder* domain and grant:
   - The segmented security group Modify permissions to enable users to create templates.
   - Any other security groups View permissions to enable users to create communications based on templates.
3. Activate Pending Security Policy Changes.

Next Steps

Create message templates.

Related Information
Concepts
Concept: Notifications on page 256

Concept: Message Builder

Message Builder is a templating tool that enables you to template, compose, and edit messages from a template dashboard and make those messages available for reuse later.

Note: Message Builder is available only to Workday products and features that adopt it.

When adopted, you can access message composition and templating tools directly through the Message Builder Templates Dashboard report or from the workflow of the integrated Workday application.

Capabilities

Message Builder provides these messaging and templating capabilities for Workday applications that adopt it:

- Rich text editing for message formatting and layout.
- Report fields that help you personalize message content.
- Templating tools to add branding, consistency, and reusability to your messages.
- Message them previewing as recipients will view, including the ability to view and link notification templates.
- Message translations to extend your audience reach (Collection Letters only).

If enabled by your application, Message Builder can also provide GenAI suggestions for email content.

Message Template Creation

You can create message templates using the:

- Create Create Message Builder Template task.
- Message Builder Template Dashboard report.

To view message templates without modify priviledges, use the View Message Builder Template report.

When you access the Message Builder Templates Dashboard, you can:

- Click New to create a new message template.
- Select an existing message template and click open to compose your message from templated text. You can also double-click the message template to open it.

To create a new template, you complete these fields:

Field	Description
Name	Enter a unique name for the new template.. When you publish a template, this name displays in the list of available message templates on the Message Builder Template Dashboard.
Notification Category	The category assigned to the type of notification that you're sending. Notification categories determine the channels you can select for sending messages. Each application that uses Message Builder has at least 1 notification category. Select 1 notification category.
Base Language	The initial language of the template that you're creating. For application that support Message Builder translations, Workday uses the base language template when the translated message for a recipient doesn't match the preferred language on the recipient's profile.. Example: The base language of a message template is French. This template has translations in English and German but the recipient's preferred language is Spanish. Because there is no Spanish message template, the recipient receives the message in French.
Channel(s)	The method of electronic transfer for your messages, such as email, mobile push, or SMS.

Field	Description
	The selected Notification Category determines the channels available. You configure the channel selections that display here for notification categories by selecting a routing rule in the Edit Tenant Setup – Notifications task. Routing rules enable you to specify which channels and frequencies Workday uses to send notifications from your tenant. The channels available for a message template depend on the selected Notification Category. Example: You configure the Learning Campaigns notification category with these channels, which are specified by the routing rule you select for your tenant: • *Email*. • *Mobile Push Notification* Now, when you create a message template with Learning Campaigns as the Notification Category, you have the choice of sending the message by email or mobile push.The channel you select also determines the editing tools available for composing a message.
Preview Notification Template (Optional)	The notification template to apply when you view a message template in the Message Builder editor. You can also change or add a notification template as you edit a message. Message Builder only enables notification templates available for the *Email* channel.

To complete template creation, you click Create Template to open the editor, where you can add message content and formatting to the template. When you access the Create Message Builder Template task, Message Builder requires you to complete the same fields.

Message Template Editing

Editing a message template is part of template creation but you can also return to saved message template to edit it. To return to a template, select it from the Message Builder Template Dashboard and click open, or double-click the template.

Alternatively, you can edit a template by accessing the Edit Message Builder Template task and selecting the template to edit.

Once in the editor, you can change the notification template applied to the message template. Notification templates provide consistent, reusable branding to message template headers and footers. To assign a default notification template to a message template, click Link notification design template to message template.

Note: You can only add notification templates when you've selected *Email* as the channel for your notification.

You can use rich text to customize your message body. The rich text editor includes these formatting and layout tools:

- Subheadings.

- Font sizes and color.
- Bold, italic, and underline.
- Bulleted and numbered lists.
- Hyperlinks.
- Report fields for personalization.
- GenAI prompts (If enabled by your application).

The tools available may differ depending on the channel selected. Example: SMS channels don't support bolding or hyperlinks. If your application supports GenAI suggestions, prompt options depend on the notification category and tenant configuration. Each notificatioc category can have a different set of prompts in the GenAI drop-down menu.

Saving and Publishing Templates

When you complete your template, you can click:

- Publish to make it available in the workflows of applications that use Message Builder. Message templates display in the Message Builder Template Dashboard as drafts.
- Save to save it as an unpublished draft in the Message Builder Template Dashboard as DRAFT. Only those with View or Modify access to the notification category of the unpublished draft can view it. Drafts aren't available in the workflows of applications that use Message Builder.

When the Message Builder Template Dashboard displays a template as CHANGES UNPUBLISHED, the message template has both a draft and a published version.

Migrating Message Builder Templates

You can use Object Transporter to migrate Message Builder templates, simplifying template maintenance and updates across tenants. You can migrate published or unpublished templates either as single instances or in configuration packages using Message Builder Templates as the implementation type.

When you migrate a published template, Object Transporter also migrates any linked Notification Designer templates. The migration tool does not migrate linked templates for unpublished template versions.

Note: Object Transporter rejects templates in draft status. Attempting to migrate draft templates causes a post migration error stating that the web service can't return the instance. To successfully migrate, you must retry the template migration with a published or unpublished template.

If a template contains embedded external fields, Object Transporter doesn't migrate those fields with it. You must migrate the external fields first. Then, as you migrate the template, Workday automatically maps the Workday IDs (WIDs) from the source to the target tenant. This mapping ensures your templates function correctly without manual changes.

Message Builder Security Setup and Configuration

To use Message Builder, you must complete these setup tasks:

- Set up Message Builder security.
- Configure Workday applications that use Message Builder to access it.
- If you're using an email channel for notifications, create and activate notification templates.
- Use the Edit Tenant Setup - Notifications task to configure channels that your application can use. Also, use this task to configure the default reply to and the from email address fields in Message Builder.
- Set up security for Notification Designer.

  If your organization has an MSA subscription service agreement with Workday, use the Innovation Services Opt-In task to enable the email channel for Notification Designer.
- If your application uses the GenAI suggestions feature in Message Builder, use the Innovation Services Opt-In task to enable the GenAI prompt options.

Note: You can't use the Message Builder Template Dashboard unless your application is configured to access Message Builder.

Related Information

Concepts

Setup Considerations: Engagement Builder on page 1384

Tasks

Steps: Set Up Security for Notification Designer on page 283
Create and Activate Notification Templates on page 284
Steps: Configure Access to Customer Central and Object Transporter on page 782
Create Configuration Packages for Object Transporter on page 785
Migrate Packages with Object Transporter on page 788
Migrate Single Instances with Object Transporter on page 793
Create an Engagement on page 1390
Create Engagement Message Templates on page 1393

Reference

Reference: Edit Tenant Setup - Notifications on page 107

Examples

2025R1 Feature Release Note: Engagement Builder

Navigation

Set Up Considerations: Custom ConnectRs

This topic provides guidance on factors to consider before setting up the Custom ConnectRs feature.

What It Is

Custom ConnectRs are multi-step task wizards that you can create to guide users through processes. These configurable wizards enable you to streamline data collection and workflows for your organization's specific needs. You can create custom ConnectRs and assign them to any domain. Administrators can set conditional visibility for ConnectRs at supported launch points. Users can access ConnectRs from Search, Announcements, Dashboards, and Cards.

You can manage these objects using these tasks and web services:

- Create ConnectR
- Maintain ConnectRs
- Delete ConnectR
- Get/Put Custom ConnectR Definitions

Business Benefits

This feature provides a more guided and intuitive experience for users. By creating custom task wizards, you can simplify complex processes, ensure you collect the right information in the correct sequence, and embed these tasks directly into the user's workflow on landing pages (i.e. Hubs, Dashboards, etc.).

Use Cases

You can use Custom ConnectRs to:

- Streamline administrative tasks that often need to be sequenced together like the tenant or feature setup tasks.
- Add the edit permissions task for multiple domains in a given functional area and add the activate pending security policy changes as a next step upon conclusion.

- Combine user preference like travel, account, and learning together to make a single workflow to complete these steps.
- Create new paths to encourage faster time to complete common tasks that you wish to join together.

Security

To set up and manage Custom ConnectRs, you need access to these domains:

Domains	Considerations
Set Up: ConnectR	Set Up ConnectR task enables you to view all custom and Workday-delivered ConnectRs.
Your chosen domain	You can secure a Custom ConnectR to any domain.

Note: Every section enforces task-level security. If a user lacks access to a task in a section, the section remains hidden from that user.

Note: Users should assign at least one task's domain in ConnectR as the entry domain whenever possible. This prevents scenarios where no sections are available.

Reporting

Workday provides these reports to help you manage your ConnectRs:

- A new report data source you can use to build custom reports on the ConnectRs in use.
- The Tasks Eligible for ConnectR report, which lists all tasks you can add to a ConnectR and explains why some tasks might be unsupported.

Unsupported Tasks

Some tasks are unsupported in Custom ConnectRs for these reasons:

- Multiple Steps: The wizard supports only single-step tasks.
- Business Process: The wizard supports only non-business process tasks.
- Unsupported Business Object: Some tasks require a certain business object to run, and not all business objects are supported. You can request Workday to enable these objects based on business needs.

Task Context

Certain tasks require a context to run. When you select a task, Workday highlights the business object needed to run that task. You can provide this context by:

- Setting a specific value for the task (e.g., a specific worker).
- Using a report field that determines the value at runtime (e.g., the current worker).

You can also select the prompt from business object option to enable users to pass a context through all the steps in the wizard. When you select this option, the prompt for the ConnectR sections will have a folder available called All Tasks for Business Object.

Special Considerations

- The domain field on the ConnectR definition secures entry to the ConnectR. If a user does not have access to at least one of the specified domains, they can't run or search for that ConnectR.
- Use the Tasks Eligible for ConnectR report to help design your definition. For many objects, Workday must enable them incrementally. Defining high-value objects that you want supported helps Workday prioritize them on our roadmap.

- ConnectRs are meant to sequence tasks. If you place a landing page task that has a button on it within the ConnectR, a user can potentially break the flow by clicking that button. These types of tasks are best run from a Hub, as they return the user to their starting point upon completion.
- If you fill out the prompt from the business object field, the prompt for the ConnectR sections will have a folder available called All Tasks for Business Object. This provides an alternative way to design a ConnectR around a business object you want to build a workflow for.

Steps to Set Up Custom ConnectR

To set up Custom ConnectRs, complete these tasks:

- Access the Create ConnectR task in the System Admin Hub under Navigation to create and configure the sections and logic for your custom ConnectR.
- Click the Maintain ConnectRs in the System Admin Hub under Navigation task to view and manage your new ConnectR.
- Configure the security for your new wizard by assigning it to the appropriate security domain.
- Add the ConnectR as a task to Hub Quick Actions, Hub Announcements, Hub Suggested Links, and Card Footers.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Steps: Set Up Dashboards and Landing Pages

Context

Dashboards and landing pages enable workers to easily access information that's relevant to them. You can set up:

- Custom dashboards.
- Workday-delivered dashboards.
- Workday-delivered landing pages.

Steps

1. Enable the domain security policy for the domain that secures the dashboard or landing page you want to make available.

   See Steps: Enable Functional Areas and Security Policies.
2. Edit Domain Security Policies.

   Grant your unconstrained security groups permission to the domain that secures the dashboard or landing page you want to make available.
3. Activate Pending Security Policy Changes.
4. Set Up Worklets on page 315.

   Specify which tasks, reports, and links should display on a dashboard or landing page.
5. (Optional) Create custom dashboards.

   See Steps: Set Up Custom Dashboards.
6. Access the Maintain Dashboards report.

   To add required and recommended worklets to a dashboard or landing page, click Edit and select the Content tab.
7. (Optional) Add Dashboard Menus on page 311.
8. (Optional) Add Home and Dashboard Announcements on page 312.

Related Information

Concepts

Concept: Dashboards on page 324

Concept: Landing Pages on page 324

Reference

The Next Level: Elevate Users' Experience with Dashboards

The Next Level: Role-Based Dashboards FAQ

The Next Level: Role-Based Dashboards Overview

Examples

Example: Create Custom Navigation Item on page 333

Example: Create Custom Navigation Group on page 334

Example: Set Up Custom Navigation Item With Workday-Delivered on page 335

Example: Revert Hub Configuration to Default Settings on page 335

Add Dashboard Menus

Prerequisites

Security: *Set Up: Tenant Setup - Worklets* domain in the System functional area.

Context

You can add menus to any Workday-delivered or custom dashboard to make it easier for users to take immediate action from the dashboard. Configure menus that include:

- Tasks.
- Custom reports.
- External links.

When you remove all menu items from a Workday-delivered dashboard, Workday displays the default menu for that dashboard.

Steps

1. Access the Maintain Dashboards report.
2. Click Edit for the dashboard you want to add a menu to.
3. Select the Content tab.

   If the dashboard has tabs, select the tab you want to add a menu to.
4. In the Menu section, add a row for each section to include on the menu and configure them with the tasks, custom reports, and external links to display in each section.

   There's no limit as to how many tasks, custom reports, and external links you can add to each section.

   Example: Add an *Actions* section to the menu, with links to relevant tasks to perform, and a *Reports* section with links to useful information to access.

Related Information

Tasks

Create or Edit SAML SSO Links

Maintain Quicklinks

Reference

Workday Community: Custom Tasks and Dashboards

Add Home and Dashboard Announcements

Prerequisites

Security:

- *Set Up: Tenant Setup - Worklets* domain in the System functional area.
- *Set Up: Announcements and Bulletin Worklet* domain in the System functional area.

Context

Configure announcements that Workday displays at the top of these Workday-delivered items available on the Maintain Dashboards report:

- Dashboard.
- Custom dashboard.
- Landing page.

You can associate a condition rule with each message to target the message to certain groups and to determine who receives the announcement. Example: Create an announcement for new employees, and separate announcements for groups based on location or job profile. To identify the target audience for messages, use the Create Announcement Rule task.

You can create announcement rules for these business objects:

- Business Entity Contact
- Extended Enterprise Learner
- Service Center Representative
- Student
- Worker

Steps

1. Access the Maintain Dashboards report.
2. Click the Edit button for the dashboard or landing page that you want to create an announcement for.
3. Select the Announcements tab.
4. Add a row for each announcement and enter details.

   You can use the arrows to adjust the order in which to display multiple announcements.

Option	Description
Rule	Select a condition rule that identifies the message recipients. If you leave this field blank, all users see this message.
Expiration Date	Users no longer see the announcement on the dashboard or landing page after this date.
Message From / Message Title	Specify who the message is from, or enter a message title.
Show Current Photo / Upload Custom Image	Include the worker profile photo of the message sender, or a custom image (Example: a logo) in the announcement. Custom images must conform to the file size limit and permitted file types for your tenant.

Option	Description
	To select an existing image or create an image, select Upload Custom Image. Workday recommends: • 600 x 338 for modal pages. Use a 16:9 aspect ratio. Announcement preview thumbnails change images to a 4:3 aspect ratio. • Images must be 300KB or smaller. Allowed file types are JPEG and PNG (without transparency). • You can upload a gif file type for the Workday Home page. It must be under 1 megabyte to animate. Note: For your announcements to have the best possible appearance, we recommend you do not use an image with a transparent background. Workday displays a stock image: • For messages with titles only. • If you select None of the above
Message	Enter the message. Click Format Text to open a larger field with a rich text editor. Maximum character count varies, due to translations, message placement, and platform. We recommend that you test out the messaging across translations, devices, and location to verify the fit. Note: Announcements on the Workday Home page don't support color and font size settings in the rich text editor.
Video	Specify a title and description, and select an image preview. Select a video to upload or enter the URL for a video hosted outside of Workday.
Task/Custom Report/External Link	Select an option for including direct links in the announcement to: • Tasks. • External links. • Custom reports. Example: Announce upcoming performance reviews on the Team Performance dashboard with a link to the Get Feedback task.

Related Information
Tasks
Create or Edit SAML SSO Links
Steps: Set Up Workday Home on page 1213

Configure Extend Cards in Hubs

Prerequisites

Your organization has an:

- Active subscription to Workday Extend.
- Extend application containing the card

deployed to your tenant.

Security: *System: Hub Setup* domain in the System functional area.

Context

You can display configurable, interactive content from your Workday Extend applications on Workday-delivered hubs. You can access them for quick actions and relevant information.

Steps

1. Access the Maintain Hubs report
2. On the hub you want to configure, select Action > View Configure Overview.
3. In the Content section, select Customize Sections and Cards.
4. Add a row for the new Extend Card.
5. From the Available Cards prompt, select the Extend Card you want to add.
6. Click OK, and then click Done.

Result

Example

Next Steps

Related Information
Tasks
Add Home and Dashboard Announcements on page 312

Configure Quick Actions Section

Prerequisites

- Review setup considerations for Hubs.
- Security: Set Up: Tenant Setup - Hub domain in the System functional area.

Context

Quick actions enable you to customize centralized spaces in Workday Hubs so that users can go directly from the Hub overview page to a task, report, external link, or Workday Extend app.

You can:

- Add Workday-delivered quick actions.
- Create custom quick actions.
- Organize quick actions into sections on the Hub overview page.

Steps

1. Access the Maintain Hubs task.
2. On the hub you want to configure, select Actions > View Overview Configuration .
3. Click Manage Quick Actions.
4. To add Workday-delivered quick actions, click Copy from Workday Actions.
    a) Select the buttons you want to add as quick actions.
    b) (Optional) Enter a label override for an action.
    c) Click OK.

    Note: The Copy from Workday Actions button only appears for Hubs that Workday delivered with a default set of buttons.
5. To configure new quick actions, click Create Quick Actions Section.
    a) In the Section Name field, enter a name for the new section.
    b) Click OK.
6. From the Actions menu of your new Quick Actions section, select Edit.
    a) Add a row to the Quick Actions grid.
    b) On the Action prompt, select Create Quick Action.
    c) Complete the task:

Option	Description
Label	Enter the text to display on the button.
Access	Select security groups or conditional rules.
Links	Select an external link, a task or report, or a dashboard.

7. Click OK.
8. Click OK.

    You can add up to 10 actions buttons.
9. To configure Quick Actions on the Hub overview, click View Overview Configuration.
10. Click Edit.
11. On the Content section, select Customize Sections and Cards.
12. Add rows for Workday-delivered quick actions or any new Quick Actions sections.
13. Add cards contained in the new sections.
14. Click OK.

Result

Workday displays the configured Quick Action sections on the Hub overview page.

Set Up Worklets

Prerequisites

Security: *Set Up: System* domain in the System functional area.

Context

Specify the useful tasks, reports, or links to include in worklets that display for your users on their dashboards and landing pages. You can also create custom worklets using the Output > Enable as Worklet option on your reports in the Report Writer.

Steps

1. Access the Configure Worklet task.
2. Select the worklet that you want to configure.
3. In each section, add rows for items to include in the worklet.

Option	Description
Actions	Display actions that you can perform in the worklet.
Custom Reports	Display links to custom reports you've created in the worklet.
System Reports	Display links to available Workday standard reports in the worklet.
External Links	Display links to third-party endpoints using Quicklinks or SAML SSO links. When you create these links, you can also specify condition rules to determine who sees them.

   You can remove and reorder rows. Workday recommends that you include the most important items at the top of each list.

Next Steps

Access the Configured Worklet Report to see the list of worklets configured for your tenant.

Related Information
Concepts
Concept: Custom Worklets

Set Up Guided Tours

Prerequisites

Security: *Set Up: System* domain in the System functional area.

Context

Note: Workday recommends that you use the Guidance Workspace instead of Guided Tours. See: Steps: Configure QuickTips using Guidance Workspace on page 1294.

You can set up guided tours to help users complete tasks by displaying customized help text for selected fields. You can also provide help text translations for a guided tour after you configure it in English.

To display all guided tours that you configure on tasks in your tenant automatically, select the Always Show Guided Tours option in the Information section of the Edit Tenant Setup - System task. See: Reference: Edit Tenant Setup - System on page 164

When you configure a guided tour, consider:

- Provide help text that supports your business case for the selected field. Example: If your company limits the number of hours a worker can request off per day, document this limit on the Daily Quantity field.
- Only enable help text for fields that require specific guidance. You need to maintain the help text you create.

Steps

1. Access the Configure Guided Tours task.
2. As you complete the task, consider:

Option	Description
Enabled	Enabled fields must have Title and Text configured or they display a blank help text pop-up in the guided tour.
Title	Enter the heading to display above the help text.
Text	Enter custom help text for the selected field.
External Link	Display an external link with the help text. Example: If you're providing help text for the Request Time Off task, you can include a link to your company time off policy. Use the Maintain Quicklinks task to manage your links.

Result

A question mark icon displays on the task header. Users can click the icon to start the guided tour as they complete the task.

Next Steps

Provide translated help text on the Translate Guided Tours task.

Steps: Create Hubs

Prerequisites

Security: *Set Up: Tenant Setup - Hub* domain in the System functional area.

Context

You can set up hubs to create centralized spaces for workspaces and content for your job function. You can also customize your hub, making it easier to find, review, and take action on hub items.

Steps

1. Edit Domain Security Policies.

   Configure these domains in the System functional area:

   - *Security Activation*
   - *Security Administration*
   - *Security Configuration*
2. Configure who receives announcements using the Create Announcement Rule task. See Add Home and Dashboard Announcements on page 312.

   You can associate an announcement condition rule with each message.
3. Set Up Hubs on page 318.

   You can customize pages to find workspaces and relevant content for specific functional areas.
4. (Optional) Translate Business Object on page 364.

   Translate the name of your hub.

   You can also translate the renamed hub using the Translate Business Object report.

Next Steps

Access these reports to review hub security:

- View Domain
- View Security for Securable Item
- Security Analysis for Hub Definition

Related Information

Concepts

Concept: Dashboards on page 324

Concept: Landing Pages on page 324

Reference

The Next Level: Elevate Users' Experience with Dashboards

The Next Level: Role-Based Dashboards FAQ

The Next Level: Role-Based Dashboards Overview

Examples

Example: Create Custom Navigation Item on page 333

Example: Create Custom Navigation Group on page 334

Example: Set Up Custom Navigation Item With Workday-Delivered on page 335

Example: Revert Hub Configuration to Default Settings on page 335

Set Up Hubs

Prerequisites

Security: *Set Up: Tenant Setup - Hub* domain in the System functional area.

Context

Hubs are customizable spaces where you can find workspaces and relevant content for your job function. You can configure hub pages for your business needs by:

- Adding custom labels.
- Adding custom reports and dashboards and Workday Extend tasks.
- Creating, reordering, and removing navigation items.

Steps

1. Access the Maintain Hubs report.
2. Select *View Overview Configuration* from the Action prompt.
3. (Optional) You can enter a hub title. You can't rename the Recruiting Hub using the Hub Title field, but you can change the title on the Maintain Dashboards report.
4. (Optional) You can enter an announcement for the hub in the Announcement section.
5. In the Content section, configure sections and cards for your hub.
6. Click OK.
7. Select *Customize Hub Navigation* from the Action menu for the action item types.
8. Select Edit > Configurable .
9. In the Configure grid, add, select, remove, or reorder navigation items to display in your hub.
10. Click OK.

11. (Optional) Click Override to rename Action items. Click View to view and override Group items.

    You can override:

    - Workday-delivered reports only with custom reports, Workday-delivered dashboards with custom dashboards.
    - Navigation group labels when you configure reports or dashboards as overridable and add custom reports or dashboards to the group.

    You can customize:

    - A new navigation item by adding custom reports, dashboards, and Extend tasks to get direct access in the hub.
    - A group of workday-delivered items with a new customized item to access both Workday-delivered items and custom Navigation Item in one centralized location in the hub.
    - Navigation experience by placing a new custom navigation item alongside Workday-delivered groups within the hub.
    - Default setting options for the specific hub, which removes all existing custom navigation items, and custom navigation groups, such as, custom reports, dashboards, and extended apps previously configured for the hub navigation.

    Note: If you customize the hub navigation, you won't get new workday delivered navigation items automatically.
12. Select *Configure Suggested Links* from the Action prompt to set up external links and links to reports and dashboards.

Next Steps

To revert navigation items to their Workday-delivered settings, select *Customize Hub Navigation* from the Action prompt on the Maintain Hubs report and select Use Default Settings.

You can set up a hub as your preferred homepage by accessing Change Preferences in My Account on your profile, navigating to Account Preferences, and selecting the hub on the Preferred Home Page option.

You can use these tasks and reports to view hub definition security:

- View Domain report.
- View Domain Security Policy task.
- View Security for Securable Item report.
- Security Analysis for Hub Definition task.

Related Information

Reference

Hub Navigation Customization

Customize Hub Navigation

Prerequisites

Security: *Set Up: Tenant Setup - Hub* domain in the System functional area.

Context

You can customize hubs by adding standard reports and Workday-delivered dashboards directly to a hub's navigation bar. You can also organize these items into new or existing navigation groups to optimize workflows and provide faster access to critical information. Workday provides default settings for each hub, but you can configure them to add, remove, and reorder navigation items.

Steps

1. Access the Maintain Hubs report.

2. On the hub you want to configure, select Action > Customize Hub Navigation.
3. Click Edit.
4. Select Configurable.
5. Add a row for each new navigation item.
6. From the Navigation Item prompt, select:
   - An existing navigation item or group.
   - *Create* to configure a new navigation item or group.

   You can select custom reports, custom dashboards, or Extend Apps to add as hub navigation items.
7. Click OK to save your changes.

Related Information
Tasks
Set Up Hubs on page 318

Reset Quick Tips

Prerequisites

Security: *Set Up: Tenant Setup - System* domain in the System functional area.

Context

Reset selected quick tips for all users at the same time.

Steps

1. Access the Reset Quick Tips For All Users task.
2. Select the Quick Tips to Reset.
3. Select the Confirm check box.

Result

The next time a user signs in to Workday, the selected quick tips display in the application.

Next Steps

You can use the Reset Quick Tips for Workday Account task to reset all quick tips for individual users.

Steps: Set Up Profile Cards

Prerequisites

Security: *Set Up: System* domain in the System functional area.

Context

You can use profile header and summary cards to consolidate and display relevant information on profiles.

Steps

1. Access the Configure Profile Header Card task.

   Add rows for the items you want to display on the header of the profile. Add at least 1 item to display on the card, or you won't be able to continue the header card configuration.

2. (Optional) Access the Configure Profile Summary task.

   Add rows for the items you want to display summary cards for on the profile.

Result

Users can see important details like contact info, role, and location on profiles without opening additional tabs.

Next Steps

- Check a sample worker profile to confirm the right fields appear.
- Add more details to user profiles. See Steps: Set Up Profiles and Profile Groups.
- Access the Workday Standard Reports report to review profile settings.

Steps: Set Up Profiles and Profile Groups

Prerequisites

- Set security on the reports and custom tasks. Workday uses the security on the reports and custom tasks to determine the profile and profile group security.
- Security: *Set Up: System* domain in the System functional area.

Context

A profile is a view of a:

- Job
- Worker
- Group

Example: You can view examples of profiles and profile groups by accessing your Worker Profile. Your Worker Profile is an example of a profile and Summary and Overview are examples of profile groups. You can also view the reports and custom tasks within each profile group.

Workday delivers the profiles that you can use, such as:

- Business Process Translation
- Candidate Profile
- Job Profile
- Talent Pool
- Tenant Setup
- Worker Profile

Within each profile, you can configure profile groups. Example: The Worker Profile includes these profile groups: Job for Worker Profile, Compensation for Worker Profile, and so on. Each profile group can also include other profile groups.

Workday defines the profile groups that are available for each profile and the reports and tasks available in each profile group. You define the:

- Reports and custom tasks that display in each profile group.
- Profile groups that display in each profile.
- Display order of the profile groups, reports, and custom tasks.

When adding reports, consider:

- You can't add advanced and composite reports that use outlining to profile groups.
- The report must have a required prompt for the object (Example: worker). Otherwise, the object won't display in the list of available reports for configure profile groups on the applicable object.

- Set all other prompts on the report to *Do Not Prompt at Runtime*. Otherwise, Workday won't display the report in the list of available reports for Configure Profile Group for the worker.
- Share the report or Workday won't display the report in the list of available reports for Configure Profile Group for the worker.

An administrator can add model profile groups that's created in Workday Extend.

Note: To enable Workday Extend, contact your Customer Base Account Executive. Workday Extend is a separate product (SKU) that requires a separate license. Workday Extend enables you to build, deploy, and share apps that run on Workday and are tailored to the specific business needs of your enterprise.

Steps

1. Access the Configure Profile task.

   Select the Display in Profile check box for each profile group to include in the profile.
2. Access the Configure Profile Group task.

   Select the Display in Profile check box to include the profile group in the profile.

   For readability, Workday recommends that you include 10 or fewer reports and custom tasks.

Result

Workday displays reports and tasks as separate tabs in the profile groups, except when the profile group has only 1 report or task.

Example

Example:

You access the Configure Profile task and configure the *Pay Group* with *All Worklets in Pay Group*. You then access the Configure Profile Group task to configure the *All Worklets in Pay Group* profile group with these items:

- Details
- Pay Group
- Members
- Staffing

When you navigate to your Worker Profile and click Compensation, Workday displays Total Rewards, Compensation, and Pay Change History as tabs.

Related Information

Concepts

Concept: Custom Reports

Restrict Security for Quick Access Shortcuts

Prerequisites

Security: *Set Up: Tenant Setup - General* domain in the System functional area.

Context

You can exclude external links, tasks, and reports, from Quick Access Shortcuts for specific security groups. Users can add any options that you don’t exclude to their My Shortcuts in Quick Access.

Steps

1. Access the Configure My Shortcuts by Admin task.
2. Add 1 row for each security group to the Excluded Shortcuts by Security Group grid.

3. For each row in the grid, select 1 or more external links, tasks, and reports to exclude.

Concept: Hubs

A hub is a centralized space where users can find tasks, reports, and other resources based on a topic or their job function. You can configure hubs to fit your tenant's specific needs and maximize productivity, then deploy them with minimal effort.

Workday has several hubs, such as:

- Manager Insights Hub enables managers to view personal and actionable insights so that they can better understand how to support their team's career development.
- Benefits and Pay Hub provides a single location for employees to review and maintain their benefits, compensation, payroll information, and access reports.
- Recruiting Hub enables recruiters to manage their workload and take action on candidates in different stages.

A hub consists of:

- A Navigation menu for easy access to tasks, reports, and dashboards that you can configure with overrides and custom content.
- Access to links such as tasks, reports, and dashboards.
- Landing pages that provide an overview of content, for which you can configure a variety of items, including Announcements, sections, and cards.

Example:

The Time and Scheduling Hub includes:

- A home page that you can configure with additional cards.
- The Schedule Workers task.
- The Review Time report.
- The Edit and Approve Time report.
- A Direct Reports section that displays Time and Scheduling data for individual workers.
- An Operational Analytics section that includes a Team Insights dashboard (Time and Absence Dashboard) and the Scheduled vs. Actuals report.
- The Team Absence calendar.

You can edit hubs on the Maintain Hubs task.

Related Information

Concepts

Concept: Dashboards on page 324

Concept: Landing Pages on page 324

Tasks

Set Up Hubs on page 318

Concept: Extend Cards in Hubs

Extend Cards in Hubs enables you to display configurable, interactive content from your Workday Extend applications directly on Workday-delivered hubs. You can embed relevant information and quick actions into your users' existing workflows. You can use App Builder to create Extend Cards and deploy them to your tenant. As an administrator, you can then add these cards to various hubs.

You can use Extend Cards to:

- Display snapshots of key information from an Extend application.
- Provide buttons or links to initiate actions and tasks.
- Give users quick access to the capabilities of your custom Extend apps.

Related Information

Tasks

Add Home and Dashboard Announcements on page 312

Concept: Dashboards

Dashboards consolidate management information and actionable items in a single location. Users access dashboards based on configurable security.

You can use the Maintain Dashboards report to run, edit, and delete the Workday-delivered and custom dashboards in your tenant. You can also add menus and announcements to dashboards.

Workday-Delivered Dashboards

Workday delivers dashboards with worklets that are specific to them. Workday sometimes builds these worklets with the Report Writer and report-specific calculated fields. You can copy and modify these worklets if you have unique requirements. You can add additional custom worklets to these dashboards using the Report Writer. Workday optimizes performance by caching most of the delivered worklets for these dashboards.

Workday delivers standard dashboards intended for managers in distinct functional areas, such as the *Expenses*, *Onboarding*, *Recruiting*, *Reporting*, or *Financial Executive* dashboards.

Custom Dashboards

In addition to standard dashboards, you can configure and deploy an unlimited number of custom dashboards. Each custom dashboard can have its own security domain in the System functional area. You can use the Maintain Dashboards report to run, edit, and delete custom dashboards.

My Dashboard

You can configure a personal dashboard of expanded worklets, secured to the *Landing Page - My Dashboard* domain in the System functional area.

Related Information

Concepts

Concept: Custom Worklets

Tasks

Steps: Set Up Custom Dashboards

Edit Domain Security Policies

Reference

The Next Level: Elevate Users' Experience with Dashboards

The Next Level: Report Administrator Dashboard

The Next Level: Role-Based Dashboards FAQ

The Next Level: Role-Based Dashboards Overview

Concept: Landing Pages

Landing pages display worklet icons for easy access to the data and tasks available in dashboards and worklets. You can configure landing pages using the Maintain Dashboards task and enable them by creating and configuring their domain security policies.

Workday delivers these landing pages:

Landing Page	Description
Home	The primary landing page for users that you can configure to display worklets (up to 20) with data about: • A worker's personal information (such as Time Off). • A manager's direct reports (such as Team Time Off). Note: We recommend that you enable the Home landing page for all users.
Workbench	You can configure this landing page for technical users of Workday, such as administrators and implementers.
Mobile Reports	Lists reports under the Reports menu option on Workday mobile solutions.

Users access their available landing pages through the main menu. When a user signs in, Workday displays the default landing page unless they've set a Preferred Home Page on the Change Preferences task.

Concept: Session Timeout

Workday sessions time out if they haven't been active for an amount of time. Session activity includes clicking links, editing values, mouse movement, and requests to the server. Example: If you're waiting for report results, your session won't time out due to inactivity. When a Workday session times out, the user must re-enter their password to sign in to Workday.

Workday automatically sets the session timeout for PCI user accounts to 15 minutes, and you can't change it. You can, however, set the session timeout for non-PCI user Workday accounts. Use:

- The Maintain Password Rules task to change the default session timeout for your tenant.
- The Edit Workday Account task to change the session timeout for individual users.
- An EIB or public web service request to change the session timeout for multiple users.

For security reasons, Workday doesn't preserve the status of your session or resume a timed-out session. When you sign in again, Workday starts a new session and resumes data entry only for tasks related to:

- Performance Reviews.
- Expense Reports.

If you've selected the Align Workday and Packaged Content Sessions check box on the Edit Tenant Setup - HCM task, the Workday session timeout is extended until the packaged content session expires. Once expired, users view an error message and the Workday session timeout resumes to the default timeout that you've configured. This feature applies to PCI and non-PCI user accounts.

Related Information

Tasks

Configure Password Reset

Edit Workday Accounts

Define Password Rules

Reference: Core Navigation

For information about navigation for users of assistive technology, access the Accessibility Interaction Overview task. Workday provides these navigation features that always display for users:

Application Header Icon	Description
MENU	Displays Apps and Shortcuts tabs. • Apps: Displays recommended apps (set up using the Configure Worklets task) and a search box for locating apps. You can add, reorder, and remove apps in this tab. • Shortcuts: You can add, reorder, and remove shortcuts. To enable Shortcuts, access the Edit Tenant Setup - System task and clear the Disable My Shortcuts In Quick Access check box. Optionally, you can enable navigation menu categories that automatically sorts and categorizes the navigation items into user-centric groups. Displays Shortcuts, Add, and Edit tabs. On the navigation menu, you can add context-free model tasks that you create in Workday Extend. Note: To enable Workday Extend, contact your Customer Base Account Executive. Workday Extend is a separate product (SKU) that requires a separate license. Workday Extend enables you to build, deploy, and share apps that run on Workday and are tailored to the specific business needs of your enterprise. To enable categories on the navigation menu, you must: • Access the Maintain Feature Opt-Ins report. For more information, see ../tenant-setup/tye1597882269821.dita. • Enable Global Navigation Menu Categories and select Opt in to Feature. • Sign in and Sign out to see the navigation menu. To reorder the default categories, you must: • Access the Global Navigation Configuration task. • Select Configure Categories button. • Reorder the categories as needed. • Select OK to apply your changes. To override the default category, you must: • Access the Global Navigation Configuration task. • Select the Configure button, next to the category.

Application Header Icon	Description
	• Select Category Override from the row on the grid that displays configurable global navigation items. • Select OK to apply your changes. To create custom labels and translations for the renamed navigation categories, you must: • Select the Translate Business Object task. • Select Global Navigation Panel Category Override in the Translatable Business Object field. • Select the language you want to translate to in the Target Language field. • Enter your custom labels in the Category Label Override field. • Select OK to apply your changes. • Click the Globe icon to provide translations. The Add and Edit buttons at the bottom enable your users to add, reorder, and remove the menu items in the same category. Your users can't move the menu items from 1 category to another. Your users can navigate to their first 4 menu items on the navigation menu through the Workday-delivered Home landing page. Alternatively, you can enable the global navigation sidebar, a new persistent navigation panel that remains visible as you move throughout Workday. When enabled, this sidebar replaces the standard navigation menu. The sidebar provides constant access to key items and includes these components: • Menu items that are categorized and appear on hover. • A *Saved* section where you can access existing shortcuts and saved items. • *Pinned apps*, which replace *Your Top Apps* on the homepage. Enabling this feature also replaces the existing recruiter hub sidebar. To enable and configure the global navigation sidebar, you must: • Ensure you have security access to the *Set Up: Tenant Setup - General* domain. • Access the Maintain Feature Opt-Ins task and opt in to Global Navigation Menu Categories. • Access the Edit Tenant Setup - System task.

Application Header Icon	Description
	• Select the Enable Global Navigation Sidebar check box. • Access the Global Navigation Configuration task to customize the menu items for users. After you enable the sidebar, you must add these menu items using the Global Navigation Configuration task to match the previous recruiter experience: • Recruiting Hub • Job Requisitions • Candidates • Recruiting Dashboard Additionally, users will need to reconfigure their shortcuts.
Workday Logo	Displays the Workday-delivered Home landing page, or the Preferred Home Page if you select one on the Change Preferences task.
Search	Enables you to find and go directly to tasks and reports.
My Conversations	Displays a badge count for unread messages in your conversations and takes you to the My Conversations panel. At this time, My Conversations supports only Candidate Conversational Messaging for SMS. You must add the security groups in the *Manage: Candidate SMS Conversations* domain in the Recruiting functional area to the *My Conversations* domain in the System functional area with Modify permissions for users to see the My Conversations icon.
Notifications	Displays a badge count for your unread notifications and takes you to your Notifications page.
My Tasks	Displays a badge count for your incomplete items and takes you to My Tasks.

Profile Photo

You can click your profile photo to access these options on the main navigation menu:

Main Menu Option	Description	Domain Security
View Profile	Displays your profile.	
Home	Displays the Workday-delivered Home landing page.	
Workbench	Displays tasks and reports commonly used by administrators and technical	*Landing Page - Workbench* domain in the System functional area.

Main Menu Option	Description	Domain Security
	users. Use the Configure My Worklet Landing Pages task to configure available worklets.	
Sitemap	Displays a list of standard reports and tasks available to you.	*Landing Page - Sitemap* domain in the System functional area.
Favorites	Displays a list of your favorite tasks, reports, business objects, and custom reports. Use the Manage Favorites task to configure the list.	*Favorites* domain in the System functional area.
Audit	Displays a list of all the audit reports and tasks available to you, sorted by category.	*Landing Page - Audit* domain in the System functional area.
Drive	Accesses the Workday file management space.	*Drive* domain in the System functional area.
My Reports	Displays a virtual drive where you can store generated reports. My Reports isn't a mapped drive on your computer.	*My Reports* domain in the System functional area.
Documentation	Navigates to Workday Documentation on Workday Community.	*Workday Documentation Link* domain in the System functional area. Note: Workday recommends that you only include users who require access to Administrator Guide content.
Help	Navigates to the URL specified in the 'Help' Link field on the Edit Tenant Setup - System task.	*Set Up: Tenant Setup - System* domain in the System functional area.
My Account	Provides access to these account management tasks: • Change Password • Change Preferences • Change Public Profile Preferences • Manage Password Challenge Questions (Do Not Use) (if enabled) • View Signon History (if enabled) • Switch Accounts (if you're a delegate) • Organization ID	

Main Menu Option	Description	Domain Security
Recovery Assistant	Displays a list of unsaved work that you've entered on tasks and reports. This option only displays when recovered items are available on desktop devices. Workday saves recovered items for 1 day.	
Sign Out	Ends your Workday session.	

Related Information

Concepts

Concept: Manage a Worker's My Tasks Items on page 1064

Concept: My Reports

Tasks

Delegate My Tasks on page 1082

Enable Users to View Their Sign-In History

Require Challenge Questions at Sign-In

Reference

2024R2 What's New Post: Global Navigation Menu Categories

Reference: Search Workday

To improve the speed and accuracy of your search results, Workday recommends that you use:

Recommendation	Description
Numbers only	Search for an ID by removing special characters, such as dashes or spaces.
Search categories	When you enter a search term, select a search category to narrow your results. Workday uses the Common category, which lists only active workers, applicants, organizations, reports, and tasks. To change the default search category in your tenant, use the Edit Tenant Setup – Search task. To change your individual preferred search category, use the Change Preferences task.
Search prefixes	To restrict search results to a specific type of Workday object, precede your search term with a prefix and a colon. Example: *bp: time off* returns business process definitions related to time off. To view a list of search prefixes, enter ? in global search.
Worker search criteria	Use these criteria to search for active workers in global search or worker prompts, using any language enabled for your tenant: • Business title of the primary job. • Business title of an additional job.

Recommendation	Description
	• Business title of an international assignment. • Contingent Worker ID. • Employee ID. • General name display. • Location of primary and additional jobs. • Primary work email address. • Public email address. • Reporting name display. • Supervisory organization of the primary job. • Supervisory organization of an additional job. • Supervisory organization of an international assignment. • User name. Note: You can configure the *Search: Current Legal and All Historical Names* security domain to allow specific security groups to search by current legal and historical names.
Staffing Organization search criteria	Use these criteria to search for staffing organizations in global search, reports, and tasks: • Organization ID. • Leader Names (First and Last Names). • Primary Location of Organization. • Organization Code. • Organization Name. Use external IDs to search for supervisory organizations in prompts.

Note: Search supports these delimiters:

- Valid search with underscore (_): *John_Smith*.
- Valid search with hash (#): *John#Smith*.
- Valid search with greater than (>): *John>Smith*.
- Valid search with slash (/): *John/Smith*.

Search doesn't support dots (.) as delimiters. Search treats criteria with dots as 1 string, and you can only search on valid segments of the string.

In this example, we formatted location with dots:

- Valid location string: *John Smith USA.CA.Pleasanton*.
- Valid segment of location string: *John Smith USA.CA*.
- Invalid location string: *John Smith CA.Pleasanton*.

Related Information

Concepts

Concept: Finding Workers

Concept: Organization Search on page 868

Reference

Reference: Edit Tenant Setup - Search on page 143

Reference: Search Prefixes for Recruiting
Reference: Search Prefixes for Staffing

Reference: Set Up Help for Self-Service Users

You can use these options to set up self-service support where it's most helpful for users:

- Provide links to your internal procedures and training materials.
- Enable users to access commonly used tasks easily.
- Set up help text to assist workers with completing tasks.

Provide Links to Your Internal Procedures and Training Materials

Option	Description
Add a link on your sign-in page to an intranet site with resources for users who have trouble accessing Workday.	You can enter a URL in the Signon Formal Note or Signon Custom Message field on the Edit Tenant Setup – System task. Because your Workday sign-in page is public, avoid including sensitive information in these fields.
Add a help option to the main menu that links to your training and help documents.	Enter a URL in the 'Help' Link field on the Edit Tenant Setup – System task.
Remove the Workday Documentation link from the main menu for self-service users.	Workday documentation doesn't include instructions specific to: • Self-service tasks. • Your implementation of Workday. Consider removing self-service groups from the security policy for the *Workday Documentation Link* domain in the System functional area.

Enable Users to Access Commonly Used Tasks Easily

Option	Description
Include information on the worker profile that is useful for your users.	Select the groups of content that display on the worker profile using these tasks: • Configure Profile. • Configure Profile Groups.
Make common self-service tasks available on the Home landing page.	Enable the *Landing Page – Home* domain in the System functional area and consider making these common worklets required: • Announcements • Benefits • Employee Changes • Expenses • My Team • Personal Information • Pay • Team Time Off • Time Off

Option	Description
	• Quicklink Worklets Consider using the Configure Worklet task to add the My Org Chart or Org Chart report to the My Team worklet.
Define search synonyms to assist workers searching for tasks.	Use the Edit Tenant Setup - Search task to define synonyms for Workday terms.

Set Up Help Text to Assist Workers with Completing Tasks

Option	Description
Configure help text to assist workers with completing steps in a business process.	Display help text for steps in business processes by selecting Business Process > Maintain Help Text from the related actions menu of the business process definition.
Configure help text to guide users as they complete tasks.	Use the Configure Guided Tours task to display custom help text for select fields on tasks.

Related Information

Tasks

Set Up Guided Tours on page 316

Steps: Display a Quicklinks Worklet on a Dashboard

Steps: Set Up Employee Self-Service

Example: Create Custom Navigation Item

This example illustrates how to create a navigation item for a custom report, enabling project managers to quickly access critical data directly from the hub interface.

Context

Your company has a custom report called Project Worker Time. Project managers need direct access to this report from the hub interface so that they can quickly and easily view project time data.

Prerequisites

Security: Set Up: Tenant Setup - Hub domain in the System functional area.

Steps

1. Access the Maintain Hubs report.
2. On the Project Manager Hub, select Customize Hub Navigation button.
3. Select Create > Configurable.
4. Add a new row to the grid.
5. From the Navigation Item prompt on the new row, click Create > Create Navigation Item.
6. Enter these values:

Field	Value
Name	Project Worker Time Report.
Item	Select Custom Report .

Field	Value
	Search Project Worker Time Details.

7. Click OK.

Result

In the Project Manager Hub, project managers now have a navigation item that leads directly to the Project Worker Time report.

Example: Create Custom Navigation Group

This example illustrates how to create a custom navigation group within a hub to centralize access for related dashboards.

Context

To improve organization and provide a centralized access point within the Project Manager Hub, you want to group together managers' frequently used dashboards. This group will contain an existing Workday-delivered dashboard alongside newly added Custom Project dashboard, ensuring managers can find both easily in one centralized location in the hub.

Prerequisites

Security: Set Up: Tenant Setup - Hub domain in the System functional area.

Steps

1. Access the Maintain Hubs report.
2. Access Project Manager Hub, and select Custom Hub Navigation Item action.
3. Select Edit > Configurable.
4. Remove the existing Workday-delivered dashboard from the grid.

   When you remove an existing Workday-delivered item from the configurable table, you can then use it as part of your custom navigation group.
5. Select Edit and add a new row in the configurable table.
6. From the Navigation Item prompt on the new row, click Create > Create Navigation Group.
7. Enter these values:

Field	Value
Name	*Dashboard*
Navigation Item	In the prompt, select Navigation Item Action (Workday Owned) > Dashboard. Add a new row to the grid and click Create > Create Navigation Item Action. See: Example: Create Custom Navigation Item on page 333

8. Click OK.

Result

In the Project Manager Hub, project managers can now find their frequently used Workday-delivered dashboard groups and Custom Project dashboard groups .

Example: Set Up Custom Navigation Item With Workday-Delivered

This example illustrates how to integrate a custom report into an existing Workday-delivered navigation group for enhanced user accessibility within a specific hub.

Context

You want to add the Custom Worker Allocation Details report to the Workday-delivered navigation report group. This integration enables you to personalize the navigation experience by placing them alongside Workday-delivered report groups within the Project Manager Hub.

Prerequisites

Security: *Set Up: Tenant Setup - Hub* domain in the System functional area.

Steps

1. Access the Maintain Hubs report.
2. Access the Project Manager Hub, select Action > Customize Hub Navigation .
3. Select Edit > Configurable .
4. Select Workday-delivered report group, click Edit to modify the navigation group.
5. Add a new row.
6. Enter these values:

Field	Enter
Name	Worker Allocation
Item	Select Custom Report > *Allocation* > *Allocation Pool Hierarchies(Custom Report)*

7. Click OK.

Result

Project Manager Hub now displays Custom Worker Allocation Details report listed alongside the Workday-delivered reports.

Example: Revert Hub Configuration to Default Settings

Context

You want to revert the Project Manager Hub to its original Workday-delivered configuration.

Prerequisites

Security: Set Up: Tenant Setup - Hub domain in the System functional area.

Steps

1. Access the Maintain Hubs report.
2. Select Custom Hub Navigation Item action for the Project Manager Hub.
3. SelectEdit > Use Default Settings.
4. An alert message displays.

   By checking Use Default Settings, you remove all existing custom navigation items and custom navigation groups that you previously configured for this hub.

5. Click OK.

Globalization

Currencies

Steps: Set Up Currencies

Prerequisites

Security: *Set Up: Tenant Setup - System* and *Set Up: Tenant Setup - Global* domains in the System functional area.

Context

You can use Workday to tailor the currencies available for selection in your tenant, and maintain currency conversion rates. You can establish defaults for these currency settings throughout Workday:

- Currency conversion rates.
- Currency rate types.
- Default currency.
- Preferred currency values.

Workday evaluates currency defaults from most to least specific:

- Worker
- Location
- Country
- Tenant

Steps

1. Access the Edit Tenant Setup - System task.
   a) In the Default Values section, set the Default Currency for all currency-related values in Workday. Workday uses the tenant default currency when no other default currencies apply. Example: company, supplier, customer, or country default currencies.
   b) In the Default Values section, select the Preferred Currency Rate Type to enable currency translation. If you don't select a Preferred Currency Rate Type, currency translation is disabled in the tenant. Workday won't display the *Enable Preferred Currency Reference View* option. The preferred currency rate type is different from currency translations in financial accounting. See Concept: Currency Translation
2. Access the Edit Tenant Setup - Global task.

   In the Frequently Used Values section, select your preferred currencies from the Preferred Currencies for Prompting prompt. The currencies you select display in the Preferred Currencies prompt in the Default Currencyfield on the Edit Tenant Setup - System task.

   Security: *Set Up: Tenant Setup - Global* domain in the System functional area.
3. (Optional) Access the Edit Location task.

   On the Business Site tab, select Edit to choose the Location Default Currency Override for any of your business site locations.
4. See Maintain Currency Rate Types on page 338.

   Create and maintain currency rate types and select a default.

5. (Optional) See Assign Company Accounting Details.

   Select a default currency rate type. When you don't select a default currency rate type, Workday uses the default currency rate type for the tenant on financial transactions.
6. See Maintain Currency Conversion Rates on page 338.
7. (Optional) Access the Change Preferences task.

   Select the Enable Preferred Currency Reference View check box if you've selected a Preferred Currency Rate Type. The preferred currency reference view displays these values for certain currency fields in Workday-delivered reports:

   - Foreign currency
   - Preferred currency

   Select a Preferred Currency to view your preferred currency values in currency fields in Workday-delivered reports and when you use the User's Preferred Currency field in custom reports.

Related Information

Concepts

Concept: Displaying Currency Fields

Concept: Multicurrency

Tasks

Assign Company Accounting Details

Steps: Set Up Financial Accounting Structure

Steps: Upload Currency Conversion Rates

Context

Currency conversion rates are necessary to convert 1 currency to another, in expense reports, ledger accounts, or other transactions. Workday uses currency conversion rates for both a company base currency and a reporting currency. Each rate specifies 2 currencies and an effective date.

Use the Enterprise Interface Builder (EIB) to upload new currency conversion rates from a spreadsheet. You can also use the upload to override existing rates.

Steps

1. Set Up Inbound EIB.

   Enter *Put Currency Conversion Rate* at the Template from Web Service Operation prompt.
2. From the related actions menu of the integration system for the upload, select Template Model > Generate Spreadsheet Template.

   To maintain the correct spreadsheet format, don't change the .xml file extension.

   Security: *Integrations: EIBs* , *Integration Configure*, and *Integration Event* domains in Integration functional area.
3. Customize EIB Spreadsheet Template.

   To customize the template, edit the template model of the EIB.
4. Set Up EIB Spreadsheet.

   Enter business data into the spreadsheet.
5. Launch EIB Spreadsheet Upload.

   Confirm that you are in a security group that has these permissions:

   - Put permission on the *Put Currency Conversion Rate* web service
   - Modify permission on the *Integrations: EIBs* security domain

Related Information

Concepts

Concept: Enterprise Interface Builder

Tasks

Steps: Set Up Currencies on page 336

Steps: Set Up Financial Accounting Structure

Maintain Currency Rate Types

Context

Defining currency rate types enables you to establish more than 1 currency conversion rate for a currency pair during a time frame. See Concept: Rates, Rate Types, and Conversion.

Steps

1. Access the Maintain Currency Rate Types task.
2. Add a row for each new currency rate type and enter a description. Example: Daily Average, Monthly Average, Daily Noon, or Daily Closing Rate.

   For existing currency rate types, view usage counts or remove a row to delete a rate type that you added.
3. Select a rate type as the default for currency conversion rates.

   Workday automatically syncs the default rate type with the *Default Currency Rate Type* value in the Default Values section of the Edit Tenant Setup - System task.

Next Steps

To set up a default currency rate type for a company, select the Currency Rate Type Override on the Edit Company Accounting Details task. If there isn't a default currency rate type for the company, Workday uses the default you specified on the tenant.

Use the Currency Rate Types report to display a list of currency rate types, usage counts, and which currency rate type is the default.

Maintain Currency Conversion Rates

Prerequisites

Maintain Currency Rate Types

Security:

- *Set Up: Currency* in the Compensation functional area
- *Set Up: Currency Rates* in the Common Financial Management functional area.

Context

Workday assists your currency conversion process by enabling you to:

- Create or edit currency exchange rates.
- Use a known currency exchange rate to calculate cross rates or inverse rates.
- Override existing currency exchange rates, as of a specified effective date and time.

These currency exchange rates enable Workday to convert monetary amounts from 1 currency to another in various financial and human resource tasks that involve currency.

You can define currency conversion rates directly in Workday. You can also upload your currency conversion rates with an Enterprise Interface Builder (EIB) spreadsheet, the currency web services, or the Currency Exchange Rate Connector. Workday supports 12 decimal precision for currency exchange rates that you enter or upload. When calculating exchange rates, such as currency cross rates or inverse rates, Workday rounds the calculated rate to 12 decimal precision. When you calculate a rate with more than 18 digits, Workday truncates display of the rate to 18 digits.

When you enter or load currency conversion rates, Workday automatically converts the timestamp to the Pacific time zone. Workday recommends you enter the timestamp to adjust for the difference between your time and Pacific time. Example: When you enter a conversion rate to be effective at 12:00 am Greenwich Mean Time (GMT) which is 8 hours ahead of Pacific time, adjust your timestamp to 8:00 AM Pacific time of the same calendar day. The timestamp visible on the Historic Currency Rates report will display as 8:00 AM, however, Workday converts it to recognize it as 12:00 AM Pacific time.

Steps

1. Access the Maintain Currency Conversion Rates task.
2. Select:

    - *Create as of Date Time* to create currency conversion rates for a new effective date and time.
    - *Edit as of Date Time* to edit currency conversion rates for an existing effective date and time.

    Workday recommends only editing a currency conversion rate to correct data entry mistakes. Editing an existing currency conversion rate overrides previously entered conversion rates for the specified effective date and time.

    Workday considers currency conversion rates effective at the date and time you specify. Workday uses the closest effective date and time for a transaction. If you create different rates on the same day, Workday determines the applicable rate using the timestamp.

    As you complete the task, consider:

Calculate Inverse Rate	Enables Workday to automatically calculate the inverse currency exchange rate.
Calculate Cross Rates	Enables Workday to automatically calculate currency exchange rates between your source currency and your target currency. Selecting this check box enables the Cross Rates Anchor Currency field.
Currency Rate Type	Enables you to define the rate type for currency exchange. Example: A rate type of *Current* is the current market rate on any given day.
Source Currencies and Target Currencies	(Optional) Select to filter the list of currency pairs that you want to create or modify.
Cross Rates Anchor Currency	Select a currency if you enabled Calculate Cross Rates. Workday calculates the currency exchange cross rates between your selected target currencies using the exchange rates between your anchor currency and target currencies.

3. (Optional) On the next page of the task, add a row and enter a new Source Currency and Target Currency pair for the selected currency rate type and effective date time.
4. (Optional) In the same row, enter the new conversion Currency Rate for one or more currency pairs.

    If there's no new conversion rate for a listed currency pair, delete the row.

Next Steps

- Access the Currency Rates as of Date report to view all currency conversion rates, calculated cross rates, and calculated inverse rates effective at a specific date and time.

- Access the Historic Currency Rates report to view all currency conversion rates entered or calculated for the specified source and target currencies. Filter by currency rate types and the From Date.

Related Information

Concepts

Concept: Company Currency

Tasks

Steps: Upload Currency Conversion Rates on page 337

Override Currency Decimal Precision

Prerequisites

Security: *Set Up: Currencies* domain in the Common Financial Management functional area.

Context

Currency precision can range from zero decimals to three decimals. You can override Workday-delivered decimal precision in currency at the tenant level when recording transactions, enabling you to comply with requirements for these currencies:

- Chilean Peso (CLP)
- Colombian Peso (COP)
- Czech Koruna (CZK)
- Hungarian Forint (HUF)
- Indonesian Rupiah (IDR)
- Indian Rupee (INR)
- Jordanian Dinar (JOD)
- Romanian Leu (RON)
- New Taiwan Dollar (TND)
- Romanian Leu (TWD)
- Special Drawing Rights (XDR)

Steps

1. Access the Maintain Currency Precision Override task.
2. Select 1 or more currencies.
3. Select the:
    a) Override check box to enable the Override Currency Precision column. When you change the decimal precision for unposted transactions, you can still post the transactions but will get an error when you try to edit them.
    b) Inactive check box when you no longer need to override the Workday-delivered decimal precision.

Result

Workday records transactions based on the configured decimal precision for operational transactions and journals when you:

- Enter a transaction amount.
- Convert transaction amounts to the ledger currency.

Time Zones

Setup Considerations: Time Zones

You can use this topic to help make decisions when planning your configuration and use of the time zone functionality in Workday. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product integrations.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Workday enables you to maintain data for users in different time zones. You can configure your tenant to accommodate users who aren't in the Pacific Standard Time (PST) time zone.

Business Benefits

Workday can now base snapshots of transactions on the time zone of the tenant or user. This adds accuracy to:

- Business process routing.
- Data management.
- Security group membership.

Use Cases

When transactions occur for users who aren't in PST, Workday retrieves the appropriate data based on the effective date in their local time zone. If you've opted in to the Workday 32 - Time Zones feature, then Workday uses the user's local time zone.

Functionality	Example Use Case
Role Inheritance	Role inheritance takes effect at 00:00 (midnight) in the tenant default time zone. Example: • Japan Standard Time (JST) is the tenant default time zone. It's 2019-06-21 in JST and 2019-06-20 in PST. • Yuki, in the JST time zone, has a manager role in Organization A. • On 2019-06-21, you add a new Organization C that's subordinate to Organization A, without assigning a manager role. By default, Yuki becomes the manager. • When a user in JST signs into Workday at any time after 00:00 JST, they see that Yuki inherited the manager role for Organization C. Yuki has role-based security access for Organization C. He receives My Tasks items and requests for business process approvals for the organization.

Functionality	Example Use Case
	See Concept: Roles, Time Zones, and Snapshots.
Positions and Position Restrictions	New managers and HR Partners who are in time zones earlier than PST can enter or select new positions or position restrictions on the Edit Position and Edit Position Restrictions tasks. Example: • You create a new position, hire Misato in JST, and assign her the HR Partner role. • Another position is created and Ichika is hired into the new position. • When Misato runs the Edit Position and Edit Position Restrictions tasks, she can enter or select the recently filled position and position restriction held by Ichika.
Organization Profile or Role Assignment	When viewing the Members, Staffing, and Unavailable to Fill tabs on the organization profile, Workday displays data based on the accessing user's time zone. Example: • It's 2019-06-21 in JST and 2019-06-20 in PST. • A position is created effective 2019-06-21. Sakura is immediately hired into the position. • On 2019-06-21, users in JST can view Sakura on the Members and Staffing tabs, and the position doesn't display on the Unavailable to Fill tab.
Organization Hierarchies	Supervisory organization hierarchy changes become effective as of 00:00 in the tenant default time zone. Example: • The tenant default time zone is JST. • You assigned a new superior organization to a supervisory organization hierarchy effective 2019-06-21 JST. • The new superior organization for the supervisory organization hierarchy displays in Workday as of 2019-06-21 00:00 JST. • JST is 16 hours ahead of PST, so users in PST can view the new superior organization as of 2019-06-20 08:00 PST. Workday honors the tenant default time zone for the effective date of supervisory organization hierarchies only. All other hierarchy types, including companies, cost centers, regions,

Functionality	Example Use Case
	locations, and custom organizations, become effective as of 00:00 PST. Example: • You assign a new superior organization to a cost center organization hierarchy effective 2019-06-21. • The new superior organization for the cost center hierarchy displays in Workday as of 2019-06-21 00:00 PST. • JST is 16 hours ahead of PST, so users in JST can view the new superior organization as of 2019-06-22 16:00 JST.
All Jobs Report on Worker Profile	Workday considers the accessing user's time zone when viewing the All Jobs report on the Worker profile. Example: • It's 2019-06-21 in JST and 2019-06-20 in PST. • Hiroshi is in JST and has an additional job added, with effective date 2019-06-21. • Users in JST can view this additional job in the Current section of the All Jobs report.
Security Group Membership	For select security groups, membership is updated at midnight based on the user's time zone instead of PST. Example: It's 2019-06-21 in JST and 2019-06-20 in PST. New employees in JST can sign into Workday at the beginning of their day.
Routing	When a change job event completes for a worker and their manager changes, Workday routes events to the manager based on the time zone of the user initiating this change. Example: • It's 2019-06-21 in JST and 2019-06-20 in PST. • Andy is transferring from California to Japan on 2019-06-21. • An HR partner in PST submits a change business title event, and it routes to Andy's previous manager, since it's 2019-06-20 for this initiator. Meanwhile, an HR partner in JST submits another change business title event, and it routes to the new manager, since it's 2019-06-21 for this initiator.
Business Processes	Workday updates select business processes to access the user's local date for snapshots.

Functionality	Example Use Case
	Example: • It's 2019-06-21 in JST and 2019-06-20 in PST. • A new employee is hired in JST effective immediately. • The Change Job task is run on Richard, who is based in Japan, and it's effective dated on 2019-06-21. The change is visible on 2019-06-21, 00:00 (midnight) JST to users based in Japan. Meanwhile, the change is visible on 2019-06-21, 00:00 (midnight) PST to users based in California.

Questions to Consider

Question	Considerations
Does your company need to opt into the time zone functionality?	If you do business across time zones, you probably want to set up time zone functionality and test it in your Preview tenant to see how it affects you.
How does your company define a worker's time zone?	A worker's time zone is the time zone associated with their primary location unless: • Their time zone is edited using the Edit Worker Time Zone task. If you enter a time zone in this task, it isn't used for a worker's role-based security group membership. • They don't have a position. Then, their time zone is the default of the tenant. • There isn't a default time zone set up in the tenant. Then, their time zone is PST.
Can you override the time zone for particular business processes?	Workday doesn't automatically apply time zone to all business processes. You can enable administrators to override the default time zone on business process configuration tasks by selecting the Business Process Configuration Time Zone check box on the Edit Tenant Setup - System task.
Do you want custom reports to use PST for the effective moment?	(Available on reports that use standard data sources.) You can update custom reports to use Pacific Time for the effective moment on the report instead of an effective local date. Effective moment is when the transaction is effective. This option is applicable only when you enter an effective date when the report runs. You can select the Use Pacific Time Zone for Effective Moment check box when editing specific custom reports, or you can select the check box for multiple reports using the Mass Update

Question	Considerations
	Reports to Use Pacific Time Zone for Effective Moment task.

Recommendations

When you configure time zone options on the Edit Tenant Setup - System task, Workday recommends that you select:

- Assignee Location for the Role Assignment Time Zone Option option.
- Event Related Time Zone for the Business Process Date Calculation Time Zone option.
- Business Process Configuration Time Zone check box.

When you set up time zones in Workday, consider the different time zones that can affect when your actions become effective.

Setting	Description
User Time Zone	Workday associates a user with a time zone. The time zone defaults to the business site that the user belongs to. You can override a user's time zone by accessing the Edit Worker Time Zone task.
Location Time Zone	Workday associates a business or site with the tenant default time zone. You can override the default for individual locations when you create them or by accessing the Maintain Location Time Zone task.
Tenant Default Time Zone	A tenant in Workday is associated with a default time zone. Workday uses PST as the default tenant time zone. You can override the default for your tenant by accessing the Edit Tenant Setup - System task.

Requirements

Configuring your tenant to accommodate users that aren’t on PST is optional.

Limitations

Once you select a Role Assignment Time Zone, you can't revert to leaving the prompt blank, so test this in your tenant before implementing it in your production system.

Tenant Setup

Configure the Time Zone Configuration options on the Edit Tenant Setup - System task.

Security

When you assign these security groups to a user, the approval step routes to their managers at the appropriate time zone based on the Role Assignment Time Zone configuration on the Edit Tenant Setup - System task:

- Any Organization Role Group.
- Manager for Majority of Event Group.
- Role-Based Security Group (Constrained).

- Role-Based Security Group (Unconstrained).

When you assign roles to positions, the security group membership for that role takes effect as soon as the position is available in the time zone where it's located.

Business Processes

No impact to step delays in business processes.

Workday updates the snapshots on select staffing business processes based on the user's local date. This increases accuracy on certain transactions by removing delays for users that aren't on PST. Snapshots on these staffing business processes access the user's local date:

- Add Additional Job
- Add Retiree Status
- Assign Pay Group
- Change Default Compensation
- Change Job
- Change Organization Assignments for Worker
- Close Evergreen Requisition
- Close Job Requisition
- Close Position
- Compensation Change for Compensation Plan Event
- Contact Change
- Contract Contingent Worker
- Create Position
- Edit Job Requisition Additional Data
- Edit Position
- Edit Position Restrictions
- Edit Position Restrictions Additional Data
- Edit Worker Additional Data Event
- Employee Contract
- End Additional Job
- End Contingent Worker Contract
- End International Assignment
- Evergreen Requisition
- Evergreen Requisition Change
- Freeze Job Requisition
- Freeze Position
- Hire
- Job Requisition
- Job Requisition Change
- Legal name change
- Manage Probation Period
- Mass Correct of Hire Business Processes
- Move Worker (By Organization)
- Move Workers (By Organization)
- Onboarding Setup
- Payment Election Enrollment
- Preferred name change
- Propose Compensation Change
- Propose Compensation Hire
- Propose Compensation Offer/Employment Agreement

- Propose Reimbursable Allowance Plan Assignments (Default Definition)
- Request Compensation Change
- Request One-Time Payment
- Request One-Time Payment Offer/Employment Agreement
- Requisition Compensation
- Remove Retiree Status
- Start International Assignment
- Submit Resignation
- Switch Primary Job
- Termination
- Title Change

Reporting

The All Jobs report on the worker profile displays information based on the accessing user's time zone.

Integrations

You can use the Core Connector: Global Worker integration template to create integration systems that:

- Report data with effective moments applicable to a worker's local time zone.
- Export the data in a Workday-defined XML format and deliver data files to an external endpoint.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information
Concepts
Concept: Core Connector: Global Worker
Reference
Reference: Edit Tenant Setup - System on page 164

Set Tenant Time Zone

Prerequisites

Security: *Set Up: System* in the System functional area.

Context

You can configure local time zones at any, or all, of 3 levels:

- Tenant (default setting is Pacific Standard Time).
- Location (default setting is the tenant time zone).
- User (default setting is the time zone of the user's associated location).

If you've opted in to the Workday 32 - Time Zones feature, then Workday uses the user's local time zone.

Steps

1. Access the Edit Tenant Setup - System task.

2. As you complete the Time Zone Configuration section, consider:

Option	Description
Default Timezone	Select a time zone for the tenant. If you don't select a time zone, Workday uses Pacific Standard Time. Use the Configure Preferred Time Zones task to configure the time zones that Workday displays in the Default Timezone prompt. Workday honors all IANA (Internet Assigned Numbers Authority) supported time zones, regardless of the preferred time zones you configure.
Role Assignment Time Zone Option	Select an option to set the time zone to use for role assignment: • Tenant Default: Workday uses the time zone in the Default Timezone prompt to determine when role assignments take effect. • Assignee Location: Workday uses the time zone of the role holder's position. Note that if this field was previously blank and you now select an option, you can't go back and clear your selection. When you don't select an option, role assignments take effect based on Pacific Standard Time.

Business Process Date Calculation Time Zone	Select a time zone to use for date calculation of step delays and notification delays in business processes:
	
	• Workday Default Time Zone Settings (PST): Workday automatically selects this option which defaults to Pacific Standard Time (PST). When you select this option, Workday resumes all delayed steps in PST.
	• Tenant Default Time Zone Settings: Workday uses the value from the Default Timezone prompt. When you select this option, Workday resumes all delayed steps and notification delays based on the selected time zone. When you don't select a value in the Default Timezone prompt, we use:
	
	    • PST to calculate the step delay.
	    • The time zone of the person receiving the custom notification to calculate the notification delay. But if the person receiving the notification doesn't have a time

Option	Description
	zone, we use PST to calculate the notification delay. Event Related Time Zone: Workday resumes delayed steps and notifications based on the time zone in the following order. When the: a. Event is about a worker, we use the time zone of that worker. b. Event isn't about a worker (such as a supplier invoice) but a worker initiates the event, we use the initiator's time zone to calculate when the delay trigger begins. When the initiating action is delegated, we use the time zone of the delegator and not the delegate's time zone. c. Notification is sent to a person, we use the time zone of that person. Note: This only applies to notification delays and not step delays. d. Person receiving the notification doesn’t have a time zone, we use the Default Timezone field configuration. But if the Default Timezone field doesn’t have a value, we use PST to resume notification delays. Note: This only applies to notification delays and not step delays. e. Event isn't about a worker and wasn't initiated by a worker, we use PST to resume step delays.
Business Process Configuration Time Zone	Select the check box to override the default time zone on business process configuration tasks. Example: adding steps, creating condition rules, or creating notifications. If you select the check box, a Time Zone prompt displays on business process configuration tasks. If you don't select the check box, Workday uses Pacific Standard Time. If you enter: • The current date in the specified time zone, the changes take effect immediately. Users in other time zones see the changes immediately.

Option	Description
	• A future date in the specified time zone, the changes take effect at midnight on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones. • A past date in the specified time zone, the changes take effect at 23:59:59 on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.

Result

The default time zone for your tenant is set to the time zone you select on the Edit Tenant Setup - System task. All locations and all users will now use this time zone, unless specifically configured to use a different local time zone.

Next Steps

Configure local time zones for individual locations using the Maintain Location Time Zones task. Unless they are individually configured to a different local time zone, users associated with this location use your specified time zone.

You can configure a user's time zone by selecting Preferences > Edit Preferred Time Zone from the related actions menu of a worker. You can also run the Edit Worker Time Zone task directly.

Related Information
Reference
Workday 32 What's New Post: Time Zones

Concept: Local Time Zones

Local Time Zones

You can configure a local time zone for your tenant, locations, and individual users to support operations in multiple locations with different time zones. Workday ensures that data is accurate in reference to the current time at a user location.

Workday supports all IANA (Internet Assigned Numbers Authority) time zones and enables you to configure preferred time zones. When you don't configure a local time zone, Workday defaults the local time zone for every tenant, location, and user to Pacific Standard Time.

Configuring Local Time Zones

Use the Configure Preferred Time Zones (secured to the *Set Up: System* domain) task to configure the time zones that Workday displays in the time zone prompts for your tenant. See Reference: Edit Tenant Setup - System on page 164. If you've opted in to the Workday 32 - Time Zones feature, then Workday uses the user's local time zone.

To ensure that initiation and event dates correspond to employees' local dates, Workday recommends that you set the time zone to correspond to the employees' local time zone when you're running batch processes.

The time zone labels include offsets from standard Greenwich Mean Time (GMT). Example: During Daylight Saving Time (DST), Workday doesn't adjust the offsets, but adjusts the time accurately to reflect DST.

You can set user account deactivation to occur at a precise time. The worker's time zone can be set by default when automating account deactivation with the *Terminate Workday Account* business process. When you access the Edit Workday Account task, Workday displays the time in the time zone of the user performing the task.

Global Tenant Setup

Steps: Set Up Country-Specific Information, Locales, and Languages

Prerequisites

Context

Follow these steps to set up country-specific information, locales, and languages so that you can enable localization for countries and comply with local regulations. Workday supports localization with:

- Extended address formats. While basic address formats conform to postal requirements, extended address formats also conform to local payroll and government requirements.
- Localized fields and country-specific data for information that varies by country, such as names and addresses.
- Local script name and address fields. Example: Enforcing local names for workers reduces data entry confusion and gives you more control over your name data.
- Locale and language settings for your tenant and business site locations. Workers at the business site locations inherit that locale.

You can also configure custom names for countries according to your local and organizational requirements. See step 5 for details.

Steps

1. Access the Edit Tenant Setup - System task.

   In the Default Values section, select the Default Locale and Preferred Display Language for your tenant.

   See Reference: Edit Tenant Setup - System on page 164.
2. (Optional) Access the Edit Location report.

   Set the locale for a business site or location. If you don't set a locale, the business site or location inherits the Default Locale of the tenant.

   Security: *Manage: Location* domain in the Organizations and Roles functional area.
3. Access the Edit Tenant Setup - Global task.

   Use the task to enable Workday-supported languages for their associated locales and manage local information with country-specific settings.

   See Reference: Edit Tenant Setup - Global on page 67.

   Security: *Set Up: Tenant Setup - Global* domain in the System functional area.
4. Configure country-specific data for localized fields.

   Access the related Maintain task of the localized field to configure country-specific data. Example: Access the Maintain Disability Configuration task to configure data for the local Disability field. See ../../../../human-capital-management/worker-information/contact-and-personal-information/personal-information/dan1370797425579.dita.
5. (Optional) Set up custom names for countries.

   Steps: Set Up Custom Names for Countries on page 352.

Next Steps

Manage translations for your configuration and business data. See Steps: Manage Translations on page 360.

Related Information
Concepts
Workday 31 What's New Post: Custom Country Names

Steps: Set Up Custom Names for Countries

Prerequisites

Context

Workday-delivered country names comply with ISO standards. You can also create custom names according to your local and organizational requirements. Custom country names display on:

- Fields and prompts throughout Workday.
- External career sites.

Note: Custom country names display in all payslip documents that you generate after the name change, excluding payslips for USA and France. Check your Workday Payroll check printing integrations for any potential impact.

Steps

1. Access the Maintain Workday Delivered Country Names task.

   Select a country or territory to configure custom names for users with a related primary work location. You can use the Native Country Name field to overwrite the country name in parentheses in the *Preferred Locale* and *Preferred Display Language* drop-downs in your Global Preferences.

   Security: *Set Up: Tenant Setup - Global* domain in the System functional area. See Reference: Edit Tenant Setup - Global on page 67.
2. Maintain Localization Settings.

   In the *Contact Information* area, configure the *Country Names* localized field to display custom country names for specific countries.

   ../../../../human-capital-management/worker-information/contact-and-personal-information/contact-information/hel1433885382227.dita.
3. (Optional) Translate Business Object on page 364.

   Select *Country Name (Localization)* from the Translatable Business Object prompt to translate custom country names.

Result

Custom country names display on:

- Fields and prompts throughout Workday.
- External career sites.

Workday displays custom country names based on a user's primary work location. If you translate custom country names, the name displays based on the user's preferred language.

Workday doesn't automatically order Japanese country prompts by the first phonetic character in the custom country name.

Related Information
Concepts
Translate Business Object on page 364

Steps: Manage Translations on page 360
Maintain Localization Settings
Steps: Set Up Check Printing Connector Integration
Example: Create and Translate Custom Names for Countries on page 359

Steps: Set Up Non-English Custom Labels

Prerequisites

Enable Allow Mixed-Language Transactions on the Edit Workday Account task for users who will work on non-English custom labels tasks.

Security: *Custom Label Management for Non-English* domain in the System functional area.

Context

Workday defines the non-English terms that you can override for certain languages. You can replace a non-English, Workday-delivered term with a custom override. When you override a default translated term, Workday replaces the term in metadata strings and displays them in Workday.

The non-English custom labels functionality enables you to customize and override Workday-delivered translated labels with translations that are more appropriate for your organization. You can also edit incorrect translated custom label replacements. You can configure custom labels for all Workday supported languages.

Steps

1. Create Overrides for Non-English Custom Label Terms on page 353.
2. Edit Non-English Custom Label Overrides on page 355.
3. Access the Maintain Non-English Custom Labels task.

   Enable the non-English custom label changes.
4. (Optional) Access the Non-English Custom Label Changes report.

   View non-English custom label configuration changes made by Workday or another user. This report helps you maintain non-English custom labels in your tenant.
5. (Optional) Access the Rebuild Search Index task.

   Rebuild the search index. Workday recommends that you don't rebuild search indexes manually but wait for the Friday server restart, when indexes rebuild automatically.

Result

Workday displays the non-English custom labels that you configured instead of the default Workday-delivered term.

Related Information
Concepts
2021R1 What's New Post: Non-English Custom Labels
2020R2 What's New Post: Maintain Non-English Custom Labels

Create Overrides for Non-English Custom Label Terms

Prerequisites

Security: *Custom Label Management for Non-English* domain in the System functional area.

Context

You can replace Workday-delivered custom label translations with your organization-specific terms. The Maintain Non-English Custom Labels task enables you to review the default term and define the overrides you want at the term or word level in your tenant. You can enter override values in Workday and activate and apply them as required.

Steps

1. Access the Maintain Non-English Custom Labels task.
2. Select the Custom Label Context.

   This is the name that corresponds to a general area of functionality in Workday. Example: Talent. The prompt displays the custom label contexts that are configured for the language you selected.
3. As you complete this task, consider:

Option	Description
Override Value	View the Default Value column to confirm the text to be overridden. Enter a different value for the custom label in the Override Value column, if needed. The override value replaces the default value wherever it displays as the translated term in Workday.
Preserve Case	Select the check box to maintain the capitalization (UPPERCASE, lowercase, or Initial Caps) of the Override Value. Example: The original value, *mitarbeiter*, is in lower case and the override value, *Angestellte*, is initial caps. When you select the check box, Workday displays the proposed value as *Angestellte*.
Disabled	Clear the check box to activate your non-English custom label in Workday. Custom labels are disabled by default.

Result

When you finish reviewing custom labels and click OK, Workday starts a background process. The background process prepares the custom labels for the Maintain Non-English Custom Label Overrides task and the *Get Non-English Custom Label Overrides* web service. You can let the process complete or select Notify Me Later. When you click Notify Me Later, the process must finish running before you can use the Maintain Non-English Custom Label Overrides task.

The *Put Non-English Custom Labels* web service will also trigger the background process.

Next Steps

Access the Maintain Non-English Custom Label Overrides task to review and configure custom label overrides for individual labels in the specified language. To access the task, you can:

- Click the Configure Custom Label Overrides button.
- Search for the task.

Related Information

Concepts

2021R1 What's New Post: Non-English Custom Labels

2020R2 What's New Post: Maintain Non-English Custom Labels

Edit Non-English Custom Label Overrides

Prerequisites

- Review and update translated term overrides on the Maintain Non-English Custom Labels task. Workday starts a background process when you make changes on the task. The process must finish running and setting up data before you can continue with the Maintain Non-English Custom Label Overrides task.
- Security: *Custom Label Management for Non-English* domain in the System functional area.

Context

You can review and update translated label overrides for non-English terms and contexts for a specific language. You can:

- Use a proposed non-English custom label value.
- Override the proposed value with an alternative.
- Retain the original value.

When you create or edit custom labels, you must rebuild your search indexes. This process can take several minutes and temporarily disables search functionality in your tenant for all your users. Workday recommends that you don't rebuild search indexes manually but wait for the Friday server restart, when indexes rebuild automatically.

Steps

1. Access the Maintain Non-English Custom Label Overrides task.
2. Select the custom label you want to review and work on.

   The custom label refers to a set of related terms, including plural and other forms depending on the language.
3. As you review the All Custom Label Overrides grid, consider:

   The Custom Label field in the header displays a numerical value for custom labels. This enables you to drill down and view override values configured on the Maintain Non-English Custom Labels task.

   Some strings will contain variables, which can display between brackets. Example: [date]. When the task runs, Workday substitutes them with appropriate values. Workday recommends that you don't change the text in the brackets.

Option	Description
Use All Proposed Value	Select the check box to accept all proposed values in the grid.
Proposed Value	Review the value and decide if you want to use the proposed text. In this column, Workday replaces the Original Value with the defined override value. To use the Proposed Value, select the Use Proposed Value check box. The value is then copied into the Custom Label Text column. Workday updates the Review Status column with a review status.
Custom Label Text	Enter a new value to override the proposed or original value. When you move out of the row, Workday updates the Review Status column with a review status.
Changes	This column displays only when you need to review an earlier configuration because the

Option	Description
	proposed or original value changed. Click the View Changes link to view the changes and make appropriate updates.
Review Status	Displays the custom label review status.

When you finish your review and click OK, Workday displays the number of remaining items for review and the percent that are completed.

4. Access the Maintain Non-English Custom Labels task to activate non-English custom label changes. To access the task:
   - Click the Enable Custom Labels button above the All Custom Label Overrides grid.
   - Search for the task and then clear the Disabled check box for all non-English terms and contexts.
5. (Optional) Access the Rebuild Search Index task to rebuild the search index. Workday recommends that you don't rebuild search indexes manually but wait for the Friday server restart, when indexes rebuild automatically.

Result

You have set up non-English custom labels for the specified language. Workday displays the updated non-English custom labels.

Next Steps

To view and take action on non-English custom label configuration changes that were made by Workday or another user, access the Non-English Custom Label Changes report.

Related Information

Concepts

Steps: Set Up Non-English Custom Labels on page 353

2021R1 What's New Post: Non-English Custom Labels

2020R2 What's New Post: Maintain Non-English Custom Labels

Concept: Country-Specific Information, Locales, and Languages

Workday provides 3 levels of international localization support:

- Use locales to format dates, times, and numbers according to a specific location. Example: the US formats dates as Month - Day - Year and the UK uses Day - Month - Year.
- Use languages to control the display of text in Workday according to a user's locale.
- Use localized fields to track country-specific information for an area, such as names and addresses.

Workday also supports localization through extended address formats and local script names and addresses.

Localized Fields and Country-Specific Data

Many business objects in Workday have localized fields, because fields for information such as names and addresses can vary between countries. Workday determines which country-specific data to display based on the associated business site location rather than the locale.

You can access the related maintain task of the localized field to configure country-specific data. Example: To configure data for the local termination reason field, access the Maintain Local Termination Reasons task. See ../../../../human-capital-management/staffing/hire-and-terminate/fle1454461198680.dita.

For Workday-delivered localized fields, you can access the related Workday report to view delivered data. Example: To view national ID types, access the National ID Types report. Before you track personal data, check the appropriate legal and compliance requirements of that country.

If you use localized fields with country-specific data for different countries, the country-specific data can have its translations for various locales. See Steps: Manage Translations on page 360.

The Localized Fields and Values report displays all localized fields and the relating country-specific data you've configured in your tenant.

The Global Library report displays Workday-delivered sample data. See ../../../../human-capital-management/country-specific-information-and-reporting/gua1502739633344.dita.

Extended Address Formats

Extended address formats are available for:

• Argentina • Austria • Belgium • Brazil • Chile • Czechia • Denmark • France • Germany • Guernsey	• Hong Kong • Indonesia • Israel • Italy • Jersey • Korea Republic • Netherlands • Norway • Philippines • Russian Federation • Singapore	• Slovakia • South Africa • Spain • Sweden • Switzerland • Thailand • Turkey • UAE

Basic address formats conform to postal requirements. Extended address formats conform to local payroll and government requirements in addition to postal requirements. The most common difference between the basic and extended address formats for these countries is that House Number and Street Name are 2 separate fields. See Reference: Edit Tenant Setup - Global on page 67 for more information.

Note: Changing from basic to extended address formats requires a conversion to ensure existing data maps correctly to new fields and that reports and integrations incorporate the new fields.

Local Script Names and Addresses

You can track names and addresses in local script for:

• Afghanistan • Algeria • Armenia • Azerbaijan • Bahrain • Bangladesh • Belarus • Bhutan • Bosnia and Herzegovina • Bulgaria • Cambodia • Chad • China • Comoros • Cyprus	• India • Iraq • Israel (extended format only) • Japan (Kanji and Kana) • Jordan • Kazakhstan • Korea Republic • Kuwait • Kyrgyzstan • Laos • Lebanon • Libya • Macao • North Macedonia	• Oman • Pakistan • Palestinian Territories • Qatar • Russian Federation (extended format only) • Saudi Arabia • Serbia • Sri Lanka • Tajikistan • Taiwan • Thailand (extended format only) • Tunisia

• Djibouti • Egypt • Ethiopia • Georgia • Greece • Hong Kong (extended format only)	• Mauritania • Mongolia • Morocco • Myanmar • Nepal	• UAE (basic and extended format) • Ukraine • Uzbekistan • Vietnam • Western Sahara • Yemen

Before enabling name and address local script fields, ensure that integrations, reports, calculated fields, custom business forms, condition rules, and other interfaces can accommodate additional local script fields.

To set up address components, see ../../../../human-capital-management/worker-information/contact-and-personal-information/addresses/hel1413571157066.dita. When you access the Maintain Address Components by Country task, you have the option to select:

- Enable Enter Western Script Check Box. This option enables you to enter the required local script address components that display by default. You can also select the Enable Western Script check box, enabling you to enter either local or Western script name components, but Western are required.
- Western Script Required. This option enables you to enter only Western script address components.
- Local Script Required. This option enables you to enter only local script address components.

When you set up name components with the Maintain Name Components by Country task, you can configure names for display in local script. See ../../../../human-capital-management/worker-information/contact-and-personal-information/names/mnj1565029510116.dita.

Locale and Language Settings

You can specify locales for your tenant and your business site locations. Workers at the business site locations inherit that locale.

When you enable a Workday-supported language, Workday displays self-service pages and business process notifications in that language for all users in the associated locales. See Workday Community: Languages for a list of available languages by Workday product. If your locale isn't associated with a Workday-supported language, then Workday displays in English.

To determine the language that displays, Workday evaluates the:

- User's selected language.
- User's selected locale.
- Selected language of user's location.
- Selected locale of user's location.
- Selected language of the tenant.
- Selected locale of the tenant (the default is US English).

Custom Names for Countries

Workday-delivered country names comply with ISO standards. You can also create custom names in the Maintain Workday Delivered Country Names task for your local and organizational requirements that display on:

- Fields and prompts throughout Workday.
- External career sites.

Workday displays custom country names for a country based on the user's primary work location. If you translate custom country names, the translated custom name displays based on the preferred language that a user selects. You can use the Native Country Name field to overwrite the country name in parentheses in the *Preferred Locale* and *Preferred Display Language* drop-downs in your Global Preferences. See Steps: Set Up Custom Names for Countries on page 352.

Related Information

Concepts

Maintain Localization Settings

Steps: Set Up Address Components by Country

Set Up Name Components

Reference: Global Library

2023R1 What's New Post: Configurable Addresses by Country

Workday Community: Moving from Basic to Extended Address Format

Workday Community: Name and Address Formats

Example: Create and Translate Custom Names for Countries

This example illustrates how to:

- Create a custom name for a country.
- Translate the custom country name.

Context

You want to rename Ireland to Republic of Ireland for users with a primary work location in Ireland. You also want to translate Republic of Ireland into French for users in Ireland who select French as their preferred language.

Prerequisites

- Configure your tenant for French translations.

  See Reference: Edit Tenant Setup - Global on page 67.
- Security: *Set Up: Tenant Setup - Global* domain in the System functional area.

Steps

1. Access the Maintain Localization Settings task.
2. From the Area prompt, select *Contact Information*.
3. Click OK.
4. For the Country row:
   a) From the Allow for Countries or Regions prompt, select *Ireland*.
   b) Select the Active check box.
5. 5. Click OK and Done.
6. Access the Maintain Workday Delivered Country Names task.
7. From the Country / Territory prompt, select *Ireland*.
8. Click OK.
9. Add a row and enter these values:

Country (Workday Delivered)	*Ireland*
Country Name (Localization)	*Create Country Name (Localization)*
Text	*Republic of Ireland*

10. Click OK and Done.
11. Access the Translate Business Object report.

12. Enter these values:

Translatable Business Object	*Country Name (Localization)*
Target Language	*French (France)*
Translatable Instances	*Republic of Ireland*

13. Click OK.
14. In the Translated Value field, enter *République d'Irelande*.
15. Exit the task.

Result

Users with a primary work location in Ireland who select:

- French as their preferred language see République d'Irelande instead of Ireland.
- Any other preferred language see Republic of Ireland instead of Ireland.

Related Information

Concepts

Concept: Country-Specific Information, Locales, and Languages on page 356
Steps: Manage Translations on page 360
Translate Business Object on page 364
Steps: Set Up Custom Names for Countries on page 352

Languages and Translations

Steps: Manage Translations

Prerequisites

Define your configuration and business data in the base language for the functional areas that you want to translate.

Context

Workday delivers translations of the user interface in many languages. You can also create translations in Workday-supported and other languages. If you're deploying Workday in multiple languages, you must create and maintain translations specific to your configuration and business data. Most customer-specific translations are set up during implementation; however, you need to create and edit translations when:

- Your configuration and business data changes.
- You add a language to your implementation.
- You increase the functionality that you're using.
- An existing translation resets because the base value of the translated item changed.

Steps

1. Access the Edit Tenant Setup - Global task.

   Verify that the target language is enabled for your tenant.

   See Reference: Edit Tenant Setup - Global on page 67.

2. (Optional) Edit Workday Accounts.

   You can configure worker accounts to enable mixed-language transactions, where workers can access Workday tasks and objects in English when those tasks and objects aren't translated in the workers' preferred languages. To enable mixed-language transactions for:

   - Individual existing workers, access the Edit Workday Account task, and select the Allow Mixed-Language Transactions check box.
   - A group of existing workers, access the Manage Workday Accounts task, and select the Allow Mixed-Language Transactions option.
   - New workers automatically as they're created, edit the business process definition that contains the Create Workday Account service step, click Configure Create Workday Account, and select the Allow Mixed-Language Transactions check box. See ../../../../authentication-and-security/accounts/workday-accounts/dan1370796453062.dita .

   Workday recommends that you select this check box only for users who need to access administrator tasks that haven't been translated. Displaying a mix of English and preferred language translations might be confusing to general users.
3. Use the Translation Status for User Language report to identify translatable attributes. See Reference: Translation Status for User Language Report on page 374.
4. (Optional) Configure the *Request Translation* business process and security policy.

   Enable users to request translations and approve translation requests.

   See Steps: Enable Users to Request Translations on page 363.
5. (Optional) Access the Base Languages report to view base languages for translatable instances.

   If you select a snapshot-enabled object, you must enter an Effective Moment.

   Security: *Data Translation* domain in the System functional area.
6. (Optional) Access the Change Base Language task to change the base language for translatable objects.

   If translated text already exists for any of the fields, you can also edit the translatable text in the Previous Base Value field.

   Security: *Data Translation* domain in the System functional area.
7. Create and edit translations.

   - For fields that haven't been translated, Workday saves changes in the base language of the field, not the user's preferred language.
   - For translated fields, Workday saves changes in the language displayed.
8. Review your translations in the target language.
   a) Access the Change Preferences task.
   b) Select the Preferred Display Language of your choice.
   c) Sign out and sign in again to see translated fields and values (Workday-delivered and your business data) in your preferred language.

   When you change the Preferred Display Language in Workday, only items that have been translated into that language display on an employee self-service or manager self-service view, unless the Allow Mixed-Language Transactions check box is enabled for your account.
9. (Optional) Use the *In-Context Translation* widget to add translations for translatable fields while remaining on the same task. You can access the widget through the globe icon that displays next to a translatable field. Select the globe icon to open a translation grid and add translations. You can use the Hide Translatable Field Indicators check box in your *Account Preferences* to hide the globe icon.

   Security: *Data Translation: In-Context Translation* in the System functional area.

Next Steps

Track changes to the base values of translations to identify translations you need to update:

- Access the Translation Base Value Change Audit report.
- Create a custom report using the Translated Data with Base Value Changes report data source.

Related Information
Tasks
Concept: Translated Job Requisitions

Determine Values to Translate

Prerequisites

- Configure your tenant for translations.
- Security: *Data Translation* domain in the System functional area Requires *Setup Administrator* access.

Context

The Translation Status for User Language report enables you to identify attributes you can translate, along with their translatable values (attribute instances).

Steps

1. Access the Translation Status for User Language report.
2. Select the User Language (the target language) and 1or more Functional Areas for the report.
3. (Optional) Select the Only Consider Transactions Available for User Language option to limit the report results to values required to perform the tasks that Workday delivers in the target language.

   If you don't select this check box, the report might take longer to generate.

Result

For each functional area requested, the report returns a list of translatable attributes and where you can find them:

Column	Description
Class	The class that contains the attribute. This is the Translatable Business Object that you select on the Translate Business Object report.
Total Instance Count	The number of translatable values that the class contains.
Exposed in Functional Areas	The functional areas that include the attribute.
Exposed in Transactions	The tasks that include the attribute and the languages for which Workday provides translations.
Maintained in Transactions	The tasks that you use to create and maintain business data for the attributes in this class. Note: We recommend maintaining your business data in 1 base language and using the Translate Business Object report to create translations.
Attribute	The element or field that has translatable values.
Translatable Attributes	The total number of translatable values:

Column	Description
	• In the base language. • Already translated in the target language. • Not yet translated.

Next Steps

You can drill down to specific instances of the Translatable Attributes by accessing the View Translation Status for User Language report and clicking a value in the column. Security: *Data Translation* domain in the System functional area.

Steps: Enable Users to Request Translations

Prerequisites

Configure your tenant for translations.

Context

You can configure the *Request Translation* business process to enable the Translation > Request Translation related action for translatable *business objects*, such as organizations or job profiles. Members of security groups with access to the *Initiation* action on the *Request Translation* business process can:

- Request translations for a business object.
- Review or approve steps in the business process.

Workday enables you to provide an additional layer of security beyond the business process security policy to control who can request translations for business objects using the Request Translation Security Configuration task.

Steps

1. Configure the *Request Translation* business process definition.

   See Steps: Configure Business Process Definitions on page 996.
2. Edit Business Process Security Policies.

   Configure the *Request Translation* business process security policy.
3. (Optional) Access the Request Translation Security Configuration task.

   Specify the security configuration and security groups that can request translations for each translatable business object. You can select 2 types of security configurations:

   - Restrictive Configuration: Only the security groups you specify can request translations for the selected translatable business objects.
   - Open Configuration: In addition to the security groups you specify for the selected translatable business objects, all security groups on the business process security policy can request translations for any other translatable business objects.

   Example: You can use the Restrictive Configuration option to allow only HR Administrators to request translations for job profiles.

   Security: *Data Translation* domain in the System functional area.
4. Activate Pending Security Policy Changes.

Result

Users with the appropriate security access can use the Translation > Request Translation related action to request business object translations.

Workday routes the translation request to the roles configured on the *Request Translation* business process for review and approval. If the translatable object isn't valid for constrained groups and the business process step is routed to a role-based security group, Workday won't assign the step. When translations are approved, they become automatically available in the tenant.

Next Steps

To load translations from a sandbox tenant into a production tenant, use an iLoad or EIB integration with the *Get Translatable Tenant Data Public* and *Put Translatable Tenant Data Public* web services.

Translate Business Object

Prerequisites

- Configure your tenant for translations.
- Security: *Data Translation* domain in the System functional area.

Context

Workday enables you to create, edit, and manage translations for your configuration and business data. You can track base language changes, remove translations, and search and filter translations more conveniently. For example, you can use the report to:

- Create and translate external career sites to support global recruiting. You can only translate external career sites into languages that Workday supports. See Setup Considerations: External Career Sites.
- Translate questionnaires into different languages to support a diverse candidate population. You can translate questionnaire names, question names and bodies, and answers for multiple choice questions. See Steps: Create and Manage Questionnaires.
- Enable document generation administrators to translate text blocks into a different language. See Concept: Text Blocks.

Steps

1. Access the Translate Business Object report.
2. As you complete Translatable Business Object field, consider these options:

Option	Description
Ethnicity	You can only collect this information for job requisitions in the United States.
External Career Site	Select to translate the: • EU cookie policy text • Header text • Site name
Questionnaire	Translate questionnaire names.
Question	Translate: • Question bodies • Question names
Question Multiple Choice Answer	Translate answers for multiple choice questions.
Text Block	Translate text blocks to generate a translated document.

Option	Description
Veteran Status	You can only collect this information for job requisitions in the United States.

3. (Optional) As you complete the Filters section, consider:

Option	Description
Translatable Instances	Leave empty to display all translatable instances. When you select a business object that enables snapshots, such as *Organization*, Workday displays an Effective as of option to determine which snapshot to translate. When you translate a snapshot and: • Create a new snapshot from an existing translated snapshot, Workday copies all translations to the new snapshot regardless of whether the base value changed. • Edit the base value of an existing translated snapshot, Workday deletes all translations.
Show Untranslated Only	When you select this check box, Workday displays only the untranslated instances of a business object.
Translation Status	Select 1 or multiple values to displays only the instances with the selected translation statuses.

The translation status values are:

Option	Description
Needs Translation	If the base value of an attribute isn't translated, or has changed before its last translation, and the setting Hide Translation after Base Value Change is checked on the Edit Tenant Setup - Global task, the existing translation clears and enables you to see the changes to the base value and the previous translated value by selectingView Details.
Needs Review	If the base value of an attribute has changed since the last time it was translated, and the setting Hide Translation after Base Value Change is unchecked on the Edit Tenant Setup - Global task. Click View Details to see the changes to the base value.
Translation requested	If a request translation business process is in progress for an attribute.
Done	If the attribute base value is translated.

4. In the Translatable Attributes section of the Items tab, consider:

Option	Description
Translated Value	Enter or edit your translations in the text box. Workday saves values when you exit each row. To save all your translated values, exit the last row on the page and leave the page.
Copy Base Value	When you select this check box, Workday copies the text from the base value but not the formatting. If you delete the translated value after Workday copies it, we do not enable the check box unless you click on the Page Navigation tab before returning to the Items tab.

When you toggle to grid view, the page displays all the translatable instances in a table format. You can translate any translatable attribute by selecting the row and then entering the translated value in the Translated Value field.

Workday searches the Display ID and Base Value content of the instances to find matching results. You can sort the search results by Business Object or Translatable Instance.

If you edit the base value or translation of a question name or body for a question that is already in use:

- Question names and bodies keep their base language.
- Translations of question names and bodies copy to the new question snapshot.
- Translations of question answers don't copy to the new question snapshot. Creating a new question snapshot generates a new set of question answer instances.

Workday dynamically generates the document using text blocks translated into the language specified in Workday. Example: Workday generates an offer letter in the default language associated with the location of the job requisition, unless you specify a different Document Language when you initiate the offer.

- If you don't specify a language, Workday generates the document using the preferred language of the *Run As User*.
- If the *Run As User* doesn't have a preferred language defined in Workday, Workday generates the document using the language associated with the default locale of the tenant.
- If nobody has translated the text blocks into a specified language, Workday generates the document using the base language of each text block.

5. (Optional) On the Page Navigation tab, as you navigate through the pages of instances, consider:

Option	Description
Go to Page	Enables you to navigate to a specific page containing the translatable instance you're looking for. Enables your search when you have a large number of translatable instances with Paging.
Export Page	Displays the translatable instances of the page and their attributes in a grid layout. You can filter on any attribute value and export the resulting data to Microsoft Excel or a PDF file.
Enable/Disable Paging	Displays the translatable instances on multiples pages or on a single page. It might

Option	Description
	take a few minutes depending on the number of translatable instances you're loading.

Related Information

Tasks

Steps: Manage Translations on page 360

Translate Employee Review Custom Labels

Prerequisites

- Configure your tenant for translations.
- Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Context

Workday provides translations for standard labels for employee review. If you use custom labels in your employee review, you can use the Maintain Employee Review Setup task to manually translate them. See Create Custom Labels.

Steps

1. Select the Allow Mixed-Language Transactions check box for your account on the Edit Workday Account task. You must select this check box to display the Maintain Employee Review Setup task in languages other than English.
2. Access the Change Preferences task.
    a) Select the Preferred Display Language of your choice.
    b) Sign out and sign in again to see translated fields and values in your preferred language.
3. Access the Maintain Employee Review Setup task.
4. Enter or edit your label translations.

Related Information

Tasks

Change Labels on Employee Reviews

Steps: Manage Translations on page 360

Translate Custom Reports

Prerequisites

Security: *Data Translation* domain in the System functional area.

Context

You can translate custom reports from the default tenant language to other languages that your tenant supports.

Steps

1. From the related actions menu of a custom report, select Translation > Translate Instance.

   You can translate these parts of a custom report:

   - Brief Description
   - Instructions
   - Label Override
   - More Info
2. From the related actions menu of a custom report, select Custom Report > Translate.

   You can translate these parts of a custom report:

   - Column heading overrides.
   - Group name overrides for sort fields.
   - Labels for prompts.
   - Report name.

Next Steps

Access the Change Preferences task and change the Preferred Display Language to view your translations.

Concept: Translations

The default language in most tenants is English. All Workday objects have a base language, which is the:

- Default tenant language for objects delivered by Workday.
- Preferred display language of the user who creates an object, such as job requisitions or job profiles.

You can access the Base Languages report (secured to the *Data Translation* domain) to view the base languages and base language values of translatable business objects.

You can only translate objects that have a value in their base language. When you translate an object, the:

- Source language is the base language of that object.
- Target language is the language that you translate into.

Before you can translate objects into a language, you must first enable the language for your tenant on the Edit Tenant Setup - Global task.

You can use the Copy Translations from Source Language to Target Language task to translate from one language variant to another if:

- The current base language is the source language.
- The Hide Translation after Base Value Change check box for tenanted translations is selected in the Edit Tenant Setup - Global task.

Workday currently only provides this task from German (Germany) to German (Switzerland).

Allow Mixed-Language Transactions

Some administrator tasks aren't translated in all Workday languages. To enable users to view these tasks in English, you can set up your global tenant to allow mixed-language transactions. See Steps: Manage Translations on page 360.

Translations Hub

The Translations Hub provides a centralized location for you to identify translatable values in English or any other language enabled in your tenant. The Translations Hub report also simplifies how you:

- Manage your translations.

- Maintain Non-English custom labels and overrides.
- Access specific documentation in the Workday Administrator Guide and in Community posts.

The Translations Hub displays reports and tasks that are secured to the *Data Translation* domain and the *Custom Label Management for Non-English* domain.

Search and View Translatable Values

You can review a list of translatable values defined or translated into the specified language with the View Translatable Values for Language report.

You can use the Search Translatable Text report to search for a specific text and find information on the business objects containing the text. It also enables you to edit or add missing translations using the related actions menu on the business objects or the individual instance.

Translatable Instances, Attributes, and Snapshots

When you select a Translatable Business Object from the Translate Business Object report, Workday enables you to select 1 or more values (instances) of that object to translate. Instances have one or more attributes, which are individual components that contain translatable content. See Translate Business Data

Example: When you translate a question for a questionnaire:

- The Translatable Business Object is *Question*. This business object includes all the questions in your tenant.
- Any question you select on the Translatable Instances prompt is a single instance of the *Question* business object.
- Each instance of the *Question* business object has a Question Text attribute, which contains the translatable text of that question.

When a business object is effective-dated, Workday keeps a separate record (or snapshot) for each version of the business objects. You can translate a specific snapshot of a business object by selecting an Effective as of date when using the Translate Business Object report.

When you search for a translatable instance in the Translate Business Object task, Workday searches for keywords in the Display ID and Base Value content of the translatable attributes.

Translation into Multiple Languages

To translate a translatable instance into multiple languages at once, access Translation > Translate Tenant Instance task from the related actions menu for any translatable instance, and use the Translations grid to enter the translated values into 1 or more target languages enabled for your tenant. You can format the Translated Value with rich text attributes from a rich text editor. Your translations are saved when you move from 1 row to another, or when you click a link on the page.

Related Information

Tasks

Concept: Country-Specific Information, Locales, and Languages on page 356

Example: Import Tenant Translations

This example illustrates how you can export untranslated instances for translation and use a spreadsheet to update translations in your tenant.

Context

You have a new Workday product and want to translate it into French. You can select the business objects you need to translate, export the untranslated data and then import your French translations to your tenant using a spreadsheet.

Prerequisites

Security: *Data Translation* domain in the System functional area.

Steps

1. Access the Create Tenanted Translation Project task. You can use your tenanted translated project as input for the web service to extract your translatable tenanted data.
    a) Define a Name for your project and use the Workday Product field to return all translatable business objects for one or multiple products.
    b) Use the Translatable Business Objects field to add or remove business objects from your selected product. You also add business objects from other products.
    c) Select one or multiple languages from the list of languages enabled for your tenant.
    d) As you complete the task, consider:

Export Untranslated Instances Only	Select this checkbox if you want to translate instances that haven't been translated.
Export Context Data	Select this checkbox if you want to export additional information.

2. Access the Create EIB task.
    a) Enter the name of your tenanted translation project and select *Inbound*. Click OK.
    b) In the Get Data section of the task, select the *Put Tenanted Translation Project Data (Web Service)* web service operation from the Web Service Operation field.
    c) Navigate to the Review and Submit section and click OK.
3. On the View Integration System page:
    a) Navigate to the related actions menu of your integration system and select Template Model > View.
    b) Select Edit Template with Data Options.
    c) In the Condition Rule Filter, select

Field	Enter
Source External or Condition Rule	*Tenanted Translation Project*
Relational Operator	*In the selection list*
Comparison Value	Your tenanted translation project.

    d) Click OK.
4. Select Generate Spreadsheet Template with Data.
    a) Select the output format. Example: XLSX
    b) Select the Generate Spreadsheet with Data check box.
    c) Click Submit.
    d) On the View Background Process page, click Refresh until the process is complete and the output is generated.

    Note: The number of instances in your output file can vary from language to language if you selected the Export Untranslated Instances Only checkbox in the Create Tenanted Translation Project task.
5. Edit the output spreadsheet to enter your translations in either the Translated Value or the Translated Rich Value column.

6. Access the View Integration System task.
    a) From the related actions menu of your integration system, select Integration System > Integration > Launch/Schedule.
    b) Select your tenanted translation project for integration and choose *Run Now* from the Run Frequency field. Click OK.
    c) On the Schedule an Integration page, use the Value field to select *Create an Integration Attachment* and upload the spreadsheet.
7. On the View Background Process page, click Refresh until the process is complete.

Result

Your translations have been uploaded successfully.

Next Steps

Access the Translate Business Object task to verify that the translations are updated in your tenant.

Related Information
Tasks
2023R1 What's New Post: Tenanted Translation Project and Integration

Reference: Translate Notifications

Workday secures all notification translations to the *Data Translation* domain in the System functional area. When you translate a notification:

- You can change the display order of the text strings and external fields in the subject or body.
- You can't change a text string to an external field, or the other way around.
- You can't change an external field.
- You can't delete a text string or an external field.

Notification Type	How to Translate
Alert Notifications	Translate Alert Notifications report.
All System Notifications (Email)	Translate Business Process System and Send Back Notifications task.
Custom Validation Notifications	• Translate Custom Validation Notifications report. • Select Validation > Translate from the related actions menu of a custom validation.
Integration Notifications	Translate Integration Notifications report.
Send Back System Notifications (Email)	Translate Business Process System and Send Back Notifications task.
Workflow Notifications	• Translate Workflow Notifications report. • Select Business Process > Translate Notification from the related actions menu of a workflow notification.

Reference: Translations

You can use these tasks and reports to create translations for some common types of business data. For a complete list of values you can translate, access the Translatable Tenant Data report.

Workday Object	How to Translate	More Information
Business data	Translate Business Object report.	Translate Business Object on page 364
Business titles	From the related actions menu of a position, select Translation > Translate Tenant Instance.	Concept: Changing Business Titles
Custom candidate grid configurations	Translate Grid Configuration task.	
Custom employee review labels	Maintain Employee Review Setup task.	Translate Employee Review Custom Labels on page 367
Custom lists	Translate Business Object report.	
Custom objects	Translate Custom Object task.	
Custom reports	From the related actions menu of a custom report, select these related actions: • Custom Report > Translate • Translation > Translate Instance Security: *Data Translation* domain in the System functional area.	Translate Custom Reports
Documents	Translate Business Object report. Select *Document* from the Translatable Business Object prompt.	
Electronic signature instructions	Translate Business Object report. Select *Review Document Step Configuration* from the Translatable Business Object prompt.	• Set Up DocuSign on page 1338 • Set Up Adobe Sign • Set Up Review Documents Steps on page 377
External career sites	Translate Business Object report.	Translate Business Object on page 364
Guided tours	Translate Guided Tours task.	
Help text for business process templates	Translate Business Object report. Select *Workflow Help Text* from the Translatable Business Object prompt.	Concept: Business Process Templates on page 1024
Help text for Manage Absence calendar	Translate Business Object report.	Steps: Set Up the Absence Calendar Experience

Workday Object	How to Translate	More Information
	Select *Manage Absence Help Text* from the Translatable Business Object prompt.	
Job requisitions	From the related actions menu of a job requisition, select Translation > Translate Tenant Instance.	Concept: Translated Job Requisitions
Notifications	Various tasks and reports in Workday.	Reference: Translate Notifications on page 371
Position titles	From the related actions menu of a position, select Translation > Translate Tenant Instance.	Concept: Changing Business Titles
Questionnaires	Translate Business Object report. Select one of these Translatable Business Objects: • *Question* • *Question Multiple Choice Answer* • *Questionnaire*	Translate Business Object on page 364
Recruiting agency information	From the related actions menu of a recruiting agency, select Translation > Translate Tenant Instance.	
Sign in page	Translate Business Object report. Select one of these Translatable Business Objects: • *Tenant* • *Tenant Challenge Question*	
Surveys	Translate Business Object report. To translate the survey name, select *Questionnaire* from the Translatable Business Object prompt. To translate a survey question, select *Question* from the Translatable Business Object prompt. To translate answers for single-select or multi-select multiple choice questions, select *Question Multiple Choice Answer* from the Translatable Business Object prompt.	

Workday Object	How to Translate	More Information
Text blocks	Translate Business Object report. Select *Text Block* from the Translatable Business Object prompt.	Translate Business Object on page 364
Time entry calendar labels for workers	On the Totals tab of the View Time Entry Template report, select Translation > Translate Tenant Instance from the related actions menu of a Label.	Set Up Calendar Totals

Reference: Translation Status for User Language Report

If you're deploying Workday in multiple languages and need to identify gaps in translations, you can use the report to attributes to translate, along with their translatable values.

- Security: *Data Translation* domain in the System functional area
- Requires *Setup Administrator* access.

For each functional area requested, the report returns a list of translatable attributes and where you can find them:

Column	Description
Class	The class that contains the attribute. This is the Translatable Business Object that you select on the Translate Business Object report.
Total Instance Count	The number of translatable values that the class contains.
Exposed in Functional Areas	The functional areas that include the attribute.
Exposed in Transactions	The tasks that include the attribute and the languages for which Workday provides translations.
Maintained in Transactions	The tasks that you use to create and maintain business data for the attributes in this class. Note: We recommend maintaining your business data in 1 base language and using the Translate Business Object report to create translations.
Attribute	The element or field that has translatable values.
Translatable Attributes	The total number of translatable values: • In the base language. • Already translated in the target language. • Not yet translated. You can drill down to specific instances by accessing the View Translation Status for User Language report and clicking a value in the column. Security: *Data Translation* domain in the System functional area.

Content Management

Document Management

Steps: Manage Access to Documents

Context

You can use segmented security to control who can create, edit, or view documents within a specified document category.

Examples:

- Configure security to enable benefits administrators to manage benefits documents only.
- Enable managers to view workers' employment documents but not their personal documents.

The Reviewed Documents section on the worker profile includes the Standard Documents and the Generated Documents grids. Workday secures the Standard Documents grid using these domains:

- *Worker Data: Add Worker Documents*
- *Self-Service: Add Worker Documents*

Workday secures the Generated Documents grid using these domains:

- *Worker Data: View Generated Documents*
- *Self-Service: View Generated Documents*

Ensure that you have access to these domains to view worker documents on worker profiles if you're associated with the business process that routes the document.

Steps

1. Set Up Document Categories on page 380.
2. Access the Create Document Category Security Segment task.

   Create a security segment for each document category.

   Security: *Set Up: Document Category Security Segments* domain in the System functional area.
3. Create Segment-Based Security Groups.

   Configure segment-based security groups to provide access to documents in each security segment.

   Repeat this procedure for each security segment that you created in step 2.
4. Edit Domain Security Policies.
   a) Edit the *Document Library* domain in the System functional area and these domains in the Person Data: Personal Data section of the Personal Data functional area:
      - *Worker Data: Add Worker Documents*
      - *Worker Data: Edit and Delete Worker Documents*
      - *Worker Data: View Generated Documents*
   b) In the Report/Task Permissions section, add the new segment-based security groups and remove all existing security groups that are restricted by the new segment-based security groups.

   If a security group is assigned to a domain and/or business process security policy and is also in a segment-based security group that's assigned to the domain and/or business process security policy, Workday ignores the segment-based security group and honors the security group instead.
5. Example: The Manager security group is assigned to a domain and business process security policy. This group also belongs to a separate segment-based security group that's assigned to the same

domain and business process security policy. In this scenario, Workday grants access based on the Manager security group configuration.

Security: *Security Configuration* in the System functional area.

Note: If a document is generated through an integration, users also need access to the *Integration Event*, *Integration Debug*, *Integration Process*, or *Integration Build* domain in the Integration functional area.

6. Activate Pending Security Policy Changes.
7. (Optional) Maintain Worker Documents.

   Provide access to all worker document categories for users who aren't members of a segment-based security group.

Result

On the Maintain Worker Documents task, you can view documents attached through a business process when you have View permissions on the business process security policy, even if you aren't a member of a segment-based security group. You can also view worker documents on the Documents tab of a worker's profile when you're associated with the business process that routes the document.

Related Information

Concepts

Concept: Security Policies

Tasks

Create Segment-Based Security Groups

Steps: Use Custom Organizations for Mass Distributions

Context

Workday enables you to distribute documents or tasks in mass using custom organizations.

Steps

1. Maintain Organization Types on page 876.

   Create a custom organization type to hold custom organizations that you'll use to distribute tasks or documents.
2. Access the Create Custom Organization task.

   Create separate custom organizations for your custom organization type that you'll use as distribution destinations.

   Example: Create separate custom organizations to use as location distribution groups for San Francisco, Chicago, and New York. Or create custom organizations for different management levels and job profiles.

   Security: *Create: Custom Organization* domain in the Organizations and Roles functional area.
3. Access the Create Membership Rule task.

   Create membership rules that define the membership of each custom organization you use for distribution.

   Security: *Manage: Membership Rule Create* domain in the Organizations and Roles functional area.
4. Assign membership to each custom organization you use for distribution using the appropriate rule.

   See Steps: Assign Membership Rules in Custom Organizations on page 874.
5. Access the Create Distribute Documents or Tasks task.

   Distribute documents or tasks using the custom organizations you've created for distribution.

   Security: *Business Process Administration* domain in the System functional area.

Set Up Review Documents Steps

Prerequisites

Set up Adobe Sign or DocuSign eSignature integrations types.

Add documents to Workday.

Security: These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*

Context

You can use *Review Documents* steps to:

- Set up document distribution as part of a business process.
- Distribute documents for electronic signature.

It is not a requirement to add all documents on the business process definition to *Review Documents* steps. If you don't add the documents, Workday won't send them for review.

Steps

1. Select Business Process > Edit Definition from the related actions menu of the business process.
2. Add a *Review Documents* step, if necessary.
3. On the *Review Documents* step, click Configure Document Review to access the Configure Review Documents Step task.
4. As you complete the task, consider:

Option	Description
Time Zone	When you select the Business Process Configuration Time Zone option on the Edit Tenant Setup - System task, you can enter a time zone. When you enter: • The current date, the changes take effect on the day of processing in the specified time zone. Users in other time zones see the changes at 00:00 (midnight) in the specified time zone. • A future date, the changes take effect at midnight on that date in the specified time zone and at the corresponding date and time in other time zones. • A past date, the changes take effect at 23:59:59 on that date in the specified time zone and at the corresponding date and time in other time zones.
Document	For the Workday default signature, you can use all file types that Workday generates. For Adobe Sign and DocuSign, you can only select documents configured as attachments and each selected document must have a unique name. Documents can't exceed

Option	Description
	the maximum number of pages or file size specified in your enterprise contract.
eSignature Integration Type	Select E-sign by Adobe Sign or E-sign by DocuSign. When Adobe Sign and DocuSign aren't set up, you can distribute documents using the default Workday signature process.
Signature Grid	When you require more than 1 signature group, add them to the grid. But when you require only 1 signature group, don't complete the grid. Each row of the grid is a single signature group. Workday considers 1 member from each signature group to be a single signer of the documents. You can only add roles configured on the *Review Documents* step to a signature group. Note: Routing modifiers aren't supported in the signature grid when configuring signature groups for the *Review Documents* step.
Conditions	(Optional) Select or create 1 or more business process condition rules. When all Conditions are true, users can review and electronically sign the document as part of the business process. To prevent secondary signers from receiving My Tasks notifications before documents are available for them to sign, configure a business process condition rule. The condition rule prevents secondary signing group members from being notified until after the primary signing group members have submitted the signed documents.
Signature Options	When you require an electronic signature, Workday displays the Signature Statement and the I Agree check box.
Attachment Options	Attachment Required or Attachment Optional. You can require or enable a worker to upload 1 file per document reviewed. When you enable Attachment Required, a document is required for the step. After a document is added during the *Review Documents* step and the event is completed, canceled or rescinded, the business process administrator can select Business Process > Manage Attachments from the related actions menu of the event to manage attachments. The business process administrator can remove the document; but when an attachment is required, the business process administrator must add another document to replace it.

Result

Workday displays My Tasks items for the current signature group only. After the current signature group signs the document, Workday displays My Tasks items for the next signature group.

For Adobe Sign:

- When your administrator uploads multiple files to send in one distribution, merging of files can occur depending on your Adobe Sign configuration. This means that, when you configure multiple documents on a single *Review Documents* step, Workday appends the eSignatures only to the last document of the series as it is displayed at the time of signing. If you want a signature on each page, Workday recommends that you add Adobe signature tags to every document on the step to ensure that every document that requires a signature has one (See Adobe Sign's documentation regarding text tags for more information). Adobe Sign offers various configuration options regarding signing multiple documents in one transaction. Please refer directly to Adobe's documentation for more information about this functionality.
- By default, Adobe Sign sends copies of the signed documents to every worker who received a request to sign the documents, including workers who didn't actually sign them.

Reviewers can use E-sign by Adobe Sign or eSign with DocuSign in My Tasks to open the document available to sign into the document server.

Note: After signing, reviewers might experience a delay before the document is visible in Workday again.

After all signature groups have signed the documents on the document server, Workday stores the signed documents.

The Full Process Record of the business process lists all signers of the document and displays:

- E-sign by Adobe Sign, E-sign by DocuSign, or e-signature for the Workday generic signature as the Signature Type.
- The date and time when the last signer submitted the *Review Documents* step as the Signature Date.
- Roles configured for each eSignature Signing Group on the Process tab.
- An Integration Error tab if a business process event includes an eSignature integration that didn't complete due to an error. You can use the information on this tab to troubleshoot the error.

When you merge a candidate with a worker and the candidate has a pending Review Documents task, Workday removes the pending Review Documents task if you're using E-sign by Adobe Sign as the eSignature Integration Type. Workday recommends that after a merge, you use the Review Documents task to add this step.

Next Steps

Set up Workday to send a custom notification on entry of a *Review Documents* step, or on entry of each signature group.

Use the Translate Business Object report to:

- Translate the text in the Document field into any target language that is enabled for your tenant. Select Document as the Translatable Business Object. Select the Translatable Instances, and then select the Effective Moment of the document snapshots to be translated.
- Translate the text in the Instructions and Signature Statement fields into any target language that is enabled for your tenant. Select Review Document Step Configuration as the Translatable Business Object, and then select the Translatable Instances.

Use the Review Document Step Status report to display all documents added to Workday using the *Review Documents* step of a business process.

Related Information
Concepts
Concept: Review Documents Step on page 985

Set Up Document Categories

Prerequisites

Security: *Set Up: Tenant Setup - Document Categories* domain in the System functional area.

Context

You can set up document categories to organize and manage different document types that you associate with workers or other objects in Workday.

Steps

1. Access the Maintain Document Categories task.
2. As you complete the task, consider:

Option	Description
Order	The order in which the categories display in document-related prompts.
Document Category Name	The name of the category displayed in document-related prompts.
ID	Create a unique ID value. You can't edit the ID value when you save the new category.
Inactive	Select to no longer display the category in document-related prompts.
Usage	Displays the number of documents in the category. Note: You can only delete a category when this number is zero.

Next Steps

- Upload worker documents that aren't associated with specific business processes on the Maintain Worker Documents task.Restrict access to specific document types on the Create Security Groups task.

  Security: *Worker Data: Add Worker Documents* and *Worker Data: Edit and Delete Worker Documents* domains in the Personal Data functional area.

Related Information
Tasks
Maintain Worker Documents

Add Documents to Workday

Prerequisites

Security: *Document Library* domain in the System functional area.

Context

You can use the Create Document task to:

- Upload the document into Workday as an attachment.
- Provide a direct link to a document on an external system.
- Create a template for a dynamically generated document.

Workday recommends not to use attachments to process Personally Identifiable Information (PII). You can't purge attachments.

Steps

1. Access the Create Document task.
2. As you complete the task, consider:

Option	Description
Name	Adobe document names (including the file extension) must be fewer than 250 characters, and DocuSign document names must be 95 characters or less. Note: You must adhere to these character limits to avoid document retrieval issues in Workday. Adobe and DocuSign truncate document names that exceed the maximum character limit, resulting in mismatched names between the eSignature provider and Workday. You must also avoid using workarounds to enter a name that exceeds the maximum limit after creating a document (Example: Using the Edit Document task).
Category	You can use segment-based security groups to restrict the document categories displayed in the prompt.
Link	Update the URL in Workday when the content on an external web site changes.
Template	Select a Source from the prompt. The source is usually the business process type that Workday uses to distribute the dynamically generated document. Select or create, and then order, the text blocks that comprise the generated document. On the Layout tab, select the Default Layout to associate with the document. Note: Workday automatically populates the Default Layout field with *Generated Document Default Layout*. This is a Workday-delivered layout with a default document retention period of 3650 days (10 years) from the date a document is dynamically generated. To prevent document loss, update *Generated Document Default Layout* using the Edit Delivered Business Form Layout task and edit the Resulting Document Expiration Offset (in days) field to meet your business and legal requirements. You can select Create Condition Rule at the Rule prompt to create a new condition rule for a text block or layout.

Option	Description
	Select the Secure Generated Content check box if you want the document contents to be visible only to users with permission to action the *Generate Document* step. You must also enter a reason for changing the security of the document.

Next Steps

From the related actions menu of the document, select *Document History* to display a version history of the document.

You can use Object Transporter to migrate documents from 1 tenant to another. Example: You can test documents in your Sandbox tenant, then migrate them to your Production tenant.

Related Information

Concepts

Concept: Dynamic Document Generation on page 1125

Concept: Generate Document Business Process on page 1126

Concept: Object Transporter on page 776

Concept: Review Documents Step on page 985

Concept: Docs for Business Processes on page 388

Tasks

Steps: Manage Access to Documents on page 375

Steps: Generate Dynamic Documents on page 1120

Edit Documents in Workday

Prerequisites

You must be a member of a segment-based or unconstrained security group type.

- Security: *Document Library* domain in the System functional area.

Context

You can edit documents that you distribute using a Workday business process. Example: Insurance documents that you want new hires to acknowledge as part of the *Onboarding* business process.

Steps

1. Access the Edit Document task.

   Note: You can edit document templates created in Drive (also known as Docs for Business Processes templates) directly in Drive. See Concept: Docs for Business Processes for more information. Use the Edit Document task only for documents that are added to Workday using the Create Document task.
2. From the Document prompt, select a document.

   Note: You can't use the Adobe Sign eSignature integration with any document that contains an ampersand in the filename.
3. As you complete the task, consider:

Option	Description
Category	Select from the categories created on the Maintain Document Categories task. Workday

Option	Description
	populates this field with the parent category of the document selected in the previous step.
Type	Change an attachment to a link or a link to an attachment.

4. Click OK to enter additional attachment or link details such as the URL.
5. As you complete the task, consider:

Option	Description
Document Attachment	(For attachments only) Upload, view, delete, or download the attachment.
Link	(For links only) Add, view, edit, or open the attached document URL.
Update Events Using This Document Version	(For attachments only) Select to update only that instance of the document. Otherwise, when you use the Edit Document task to update a document, Workday generates a new instance (or snapshot) of the document. Example: Business process 1 uses version A of a document and business process 2 uses version B of the same document. When you edit version A of the document and select this check box, Workday updates only Business Process 1, not Business Process 2.

Next Steps

Access the View Document report to view or download the document.

Related Information

Concepts

Concept: Review Documents Step on page 985

Tasks

Create Segment-Based Security Groups

Mass Distribute Documents or Tasks

Prerequisites

Configure the *Distribute Documents or Tasks (Default Definition)* business process and security policy in the System functional area.

Security: *Business Process Administration* domain in the System functional area.

Context

You can distribute documents and tasks to workers in 1 or more organizations.

Examples: Documents for acknowledgment, electronic signature, or general distribution and To Do tasks.

Workday doesn't send attachments to workers who are excluded from headcount. Example: When a worker is on leave or international assignment.

Workday doesn't support the *Generate Document* action step or *Review Documents* step type on the *Distribute Documents or Tasks* business process. Adding generated documents for mass distribution might cause inconsistent results. For document reviews, you can use the *Review Distribution of Documents or Tasks* action step type instead.

For optimal performance, Workday recommends that you limit each distribution population size to a maximum of 10,000. If you're using DocuSign and want to exceed this limit, please contact DocuSign support. The maximum distribution limit is 40,000.

Steps

1. Access the Create Distribute Documents or Tasks task.
2. As you complete the task, consider:

Option	Description
Role(s)	Select 1 or more roles that are constrained to the selected organizations that you'll use to distribute tasks or documents (including subordinate organizations if applicable).
User(s)	Select 1 or more User(s) from the selected organizations. You can select users from subordinate organizations when you select the Include Subordinate Organizations check box.

Result

Workday distributes the documents or To Do items to workers in the selected organizations through My Tasks.

Workday displays the:

- Background Process page for the distribution, enabling you to track the progress of the distribution and its completion.
- Number of employees it distributes the documents to.

When a role and user resolve to the same worker, Workday displays only 1 item in My Tasks.

Next Steps

You can access the:

- Mass Advance Business Process task to advance the business process manually to the next step or to the end of the business process. You must have access to the manual advance action in the Who Can Do Actions on Entire Business Process section of the business process security policy.
- Mass Cancel Business Process task to cancel in-progress business processes. You must have access to the cancel action in the Who Can Do Actions on Entire Business Process section of the business process security policy.
- Mass Rescind Business Process task to rescind a completed business process. You must have access to the rescind action in the Who Can Do Actions on Entire Business Process section of the business process security policy.

Run these reports to view the status of distributed documents or tasks:

- Document or Task Distribution Status
- View Distribute Documents or Tasks

An in-progress distribution might be:

- Currently distributing to recipients.
- Finished distributing but awaiting recipient signatures, in the case of a document distribution.

You can use the Background Process page for the distribution:

- To abort an in-progress distribution that is still currently sending documents or tasks. Workday updates the status to Aborted and indicates that there are no recipients for the distribution. For document distributions, Workday doesn't send a cancellation request to Adobe Sign or DocuSign. This might result in transactions that are pending completion in your Adobe Sign or DocuSign account.
- To cancel an in-progress distribution that is finished distributing, but still awaiting recipient signatures. Workday updates the status to Canceled and indicates that there are no recipients for the distribution. For document distributions, Workday sends a cancellation request to Adobe Sign or DocuSign.

Related Information

Concepts

Concept: Business Process Management on page 1055

Concept: Custom Organizations on page 879

Tasks

Edit Business Process Security Policies

Docs for Business Processes

Steps: Set Up Docs for Business Processes

Prerequisites

- Set Up Security for Drive for all users who create, edit, or view Docs templates.
- Security: *Security Configuration* domain in the System functional area.

Context

Workday Docs enables you to automate the generation of documents using Workday data. Docs is an alternative to the traditional text block method for creating document templates.

The *Docs* security domain in the System functional area manages the ability to use Docs templates. When setting up *Docs*, add all users who create, edit, or access Docs templates to the *Docs* and *Drive* security domains.

Steps

1. Create security groups for users who will be working with Docs templates, such as administrators, and users who will be generating documents, such as recruiters.

   Use these security group types:

   - Role-based groups.
   - Unconstrained groups.
2. Create or edit a security policy for the *Docs* domain and add permissions.
   a) Access the View Domain report.
   b) Select *Docs* from the Domain prompt.
   c) From the related actions menu, select Domain > Create Security Policy, or select Edit Security Policy Permissions if there's an existing policy.
   d) In Report/Task Permissions, add or edit security groups.
   e) Select the View and Modify check boxes.
   f) As a related action on the domain security policy, select Domain Security Policy > Enable.
3. Activate Pending Security Policy Changes.

4. Access the Edit Tenant Setup - System task.

   In the System Setup section, enable the DWXF file type by selecting one of these options:

   - *Allow All File Types*
   - *Allow ONLY Specific File Types* and then select *DWXF*

   Security: *Set Up: Tenant Setup - System* domain in the System functional area.

   See Reference: Edit Tenant Setup - System on page 164.
5. (Optional) Access the Edit Tenant Setup - Global task.

   In the Languages section, enable languages in the Available Languages grid to make them available as language instances in Docs templates.

   Security: *Set Up: Tenant Setup - Global* domain in the System functional area.

   See Reference: Edit Tenant Setup - Global on page 67.

Create and Publish Docs Templates

Prerequisites

Security: These domains in the System functional area:

- *Drive*
- *Docs*
- *Document Library*

Context

Keep these considerations in mind when creating and publishing templates:

- If you want to automatically share a Docs template with a set of users, you can share a folder in Drive with individual users or with a security group, and place the new template into that folder.
- Docs doesn't support automatically publishing on a future date. If you want to hold your changes back until a specified date, you need to manually publish on that date.
- Docs doesn't support concurrent editing or publishing of templates by more than 1 user.
- Docs doesn't support right-to-left (RTL) language formatting.
- When you create a new template, the new template will be available to configure to the business process even if you haven't published it yet. Until you publish it, the document generated from it will be blank. We recommend not configuring a template to a business process until after you publish it.
- If you upload a previously downloaded template file, make sure you publish it before configuring it to the business process.

Steps

1. From Drive, select New > Document Template and name the template.

   For DocuSign, you must use a name with fewer than 100 characters. For Adobe Sign, names can't contain special characters such as the ampersand.
2. Select a source.

   The source is the business process type that uses the *Generate Document* step for the document. Example: The *Offer* business process type can be a source.
3. Select a category.

   Categories enable you to organize and manage different types of documents associated with workers or other objects in Workday. You can use segment-based security groups to restrict the document categories that display in the prompt.
4. (Optional) Select Language > Add Language to change the base language.

   When you create the template, Workday Docs sets the base language to English. Any new language instances use the English content as a starting point for your translated template.

5. Add content to the template.

   The template initially is in an unpublished state. A Published or Unpublished Changes indicator displays at the top of the template to indicate the status of the content.
6. (Optional) Add new language instances for the template by clicking Language > Add Language.

   When you create a language instance, Docs copies the existing content from the base language into the new instance. Then you use that content as a guide and manually replace it with the content in the desired language.

   You create and manage translated content in headers and footers in the same way as the template content. Each language has separate headers and footers.

   If a generated document is sent to a user whose preferred language doesn't match any of the defined language instances, Workday sends that user the base language document.
7. Click Publish to make the current content active in the template.

   When you publish the template, business processes start using the updated template when generating documents.

   When you click Publish, if any errors exist in the template:

   - A red dot displays next to a language in the text editor drop-down list and the headers/footers drop-down list if the language instance contains one or more errors in data fields, condition rules, or images.
   - A red border displays around the text editor drop-down list and the headers/footers drop-down list if any language has an error. The red border displays until you fix all errors in all the language instances.
   - A red banner and check box display in the condition rule or data field panel, enabling you to display only the rules or fields with errors.
8. Make additional changes to the template as needed. As soon as you make a change, its state changes to unpublished, and the orange Unpublished Changes indicator displays at the top of the template. Your template changes aren't used in the business process until you click Publish to activate those changes.

Move Docs Templates Between Tenants

Prerequisites

- Ensure the DWXF file type is a supported type in the destination tenant. See Steps: Set Up Drive on page 411.
- Ensure both the source and destination tenants have the same security configuration and the same languages defined in the *Edit Tenant Setup – Global* task. See Reference: Edit Tenant Setup - Global on page 67.

Context

You can migrate your templates between tenants by downloading (exporting) from a source tenant and uploading (importing) to a destination tenant. Workday Docs doesn't support OX-based migration of templates between tenants.

After moving a template between tenants, you must open the template in the destination tenant before using it in the *Configure Generate Document* step. This enables Docs to run an error check process, checking the configuration of the condition rules and data fields in the template.

Workday Docs doesn't support replacing existing templates in a tenant. Example: You have a template in a Production tenant and you update the template in a Sandbox tenant, you can't replace the Production template with the Sandbox template. You must manually make the changes in the Production level template, or upload the edited template as a new template and configure it to the business process.

Steps

1. Access the View Document Template Details report.

   Manually migrate all data fields and condition rules used in the template from the source tenant to the destination tenant.

   Your migration may include editing Reference IDs or using Object Transporter. The data fields, condition rules, and reference IDs must match between the source and destination tenants.
2. On the template open in the source tenant, navigate to File > Download As > Docs Template.

   The template downloads as a DWXF file. You must be the template owner or have edit permissions to do this step. Sharing permissions aren't saved in the downloaded template file.
3. From Drive in the destination tenant, select Add New > Upload to upload the DWXF file.
4. Open the template and select the document category.
   a) Workday starts automatic data migration. The migration makes sure all of your data fields and condition rules map to the template correctly in your destination tenant.
   b) If errors occurred during the migration, an error page displays. Fix any errors by either migrating any necessary data fields and condition rules or by editing the Reference IDs so they match.
   c) Once you fix the errors, refresh the page. After the migration completes successfully, you can make edits to your template as needed.

Concept: Docs for Business Processes

Workday Docs is a document template creation application in Workday. With Docs you can design, create, and preview Docs templates that you then use to generate documents using Workday DocGen. Docs is an alternative to the traditional text block method for creating document templates. Workday Docs supports several types of documents and business processes. Workday Docs doesn't require the use of BIRT (Business Intelligence and Reporting Tools). You manage Docs templates using Workday Drive.

You can access Workday Drive by selecting the Drive option in the Workday main menu.

With Workday Docs, you can create a new document template from Drive and:

- Insert data fields, condition rules or blocks, and page breaks.
- Create and manage language instances within a template, so that you can easily keep track of translated content.
- Preview and edit the layout and content of a document.
- Share templates with individuals or with unconstrained security groups.
- Publish the template so that you can select it for use as the Default Document during the *Configure Generate Document* step of a business process.

When you configure a *Generate Document* step in a business process, you can select a Docs template as the source.

The overall review process, which you can launch from My Tasks, and the business process steps remain the same.

Docs templates that you create and manage with Workday Docs exist in parallel with traditional document templates that you create using text blocks or BIRT. You can select either type of template in your business process steps.

When you set up Workday Docs for business processes, we don't support:

- Automated conversion of templates based on text blocks into the Docs template format.
- Custom fonts. The template editor, preview PDFs, and generated PDFs currently use the Roboto font. You can't change this selection.
- Emojis.
- OX-based migration of templates between tenants. To move templates, you can download them from the source tenant and upload them to the destination tenant, and edit reference IDs.

- Reusable content between templates. Example: If the same content is in two templates, you need to update it in both.

Related Information

Reference

Reference: Business Processes That Support Docs for Business Processes on page 397

Concept: Language Instances for Translated Templates

You can design and customize content for multiple languages in a single Docs template. You can select the languages that are available to add to the template from the Languages section on the *Edit Tenant Setup – Global* task. Docs doesn't support Simplified Chinese and right-to-left (RTL) language formatting.

When you create a template, Docs assigns a base language of English. To add a language instance, select Language > Add Language and search for the languages you want to add. When you add a new language instance, Docs automatically copies the content that is present in the base language at the time you add the instance.

Workday does not automatically translate text into a new language. Instead, you customize each language instance by manually replacing the original content with text that has already been translated. If you want styling, layouts, data fields, or condition rules to apply across all language instances, you need to set them up in the base language before creating the language instances. Deleting a language from the Language > Add Language modal permanently removes all the content in that language instance from the document template. You can’t delete a language that is assigned as the base unless you first select another language as the base.

When you publish a document template, all language instances are published as well. Data field and condition rule formatting in generated documents are based on the recipient user's location and not the language instance of the template. If you don’t add an instance for a recipient’s language in the document template, the document will be generated using the base language.

When you don't specify a language in the template, Workday generates the document using the preferred language of the Run As User. When the Run As User doesn't have a preferred language defined in Workday, Workday generates the document using the language associated with the default locale of the tenant.

Concept: Security Domains and Docs Template Actions

This table summarizes the primary actions you take in the workflow, and the domain or business process access needed. It includes actions that are part of the traditional workflow for generating and reviewing documents as well as actions that you now do using Workday Docs. Workday Docs actions are shown in bold text.

Action	Docs Domain	Drive Domain	Business Process Permissions	Notes
Set Up Offers			X	Workday Docs supports several document types and business processes. Setting up an offer letter is an example.
Define Document Categories			X	
Create Docs templates from Drive	X	X		Template creators must select a category when creating a new template, and must have access to that category. The *Document Library* domain controls access to categories.

Action	Docs Domain	Drive Domain	Business Process Permissions	Notes
Create text, layouts, headers, and footers in the Docs template	X	X		Docs replaces the need for BIRT custom layouts on the Associate Custom Layouts with Generated Documents task. Template creators and editors need access to data fields and condition rules to use them in the template. The *Document Library* domain controls access to data fields and condition rules. Note: Translated instances or translations at runtime aren't supported.
Share Docs templates with users or security groups		X		To automatically share Docs templates with other users, create the template in a shared Workday Drive folder that the other users have access to. The recipients need access to the *Docs* domain.
Preview PDF in Workday Docs	X	X		While editing the Docs template, click Preview to see what your document would look like.
Configure Generate Document Step Add a Generate Document Action step to a business process			X	• In the Default Document prompt, select Drive Documents and navigate to the Docs template. • Any user with permission to configure a step to a business process can view all Docs templates on that tenant. Drive domain access doesn't determine which Docs templates are selectable. Although all templates are selectable, the information in the templates isn't viewable; only users with Drive domain access and individual template access can view the template content. • Docs templates are displayed and selectable even if the template is in the Trash in Drive. • Delegating tasks isn't supported when you use Docs templates in a business process.

Action	Docs Domain	Drive Domain	Business Process Permissions	Notes
				• Tip for Recruiting: By default, the My Tasks label for the document review doesn't display the requisition number or candidate name. You can make this information display using the Business Process > Maintain Step Label Override step on the Generate Document Step of the document. For example, if you update the label to *Generate Offer*, the My Tasks item will include the job requisition and the candidate name.
Set up the Review Documents steps			X	
Edit/update the Docs template	X	X		Workday Docs doesn't support effective dates. As soon as you create and publish a Docs template, and associate it with a business process, the template is used when the business process runs. Whenever you want to update a Docs template, we strongly recommend that you copy the template, make your changes in the copy, and then replace the original template in the business process with the copy.
Review the generated document in Docs (still launched from My Tasks)			X	Reviewers click the Review button to open the generated document from My Tasks. The BP configuration defines who can review. Users who generate documents, such as Recruiters, don't need Drive access. Note: In the Review step of your business process, within Configure Review Document Step, make sure the Document field is selected from the Generate Document Step category, and not the Document Template. If you select Document Template here, manual edits to the generated document aren't saved.
Review the final generated PDF			X	The reviewer, such as a recruiter, can download a PDF by opening the generated document from My Tasks, clicking Review, and then downloading the PDF from the File menu.

Action	Docs Domain	Drive Domain	Business Process Permissions	Notes
				The generated PDF uses the Roboto font; the font selection isn't editable.
Transfer ownership of Docs templates	X	X		In Workday Docs, templates have individual users as owners. You can transfer ownership at any time if needed. See Transfer Ownership of Drive Items to a Different User.
Purge documents generated by the Generate Documents step				You can use a data purging task. Keep in mind that the Purge Person task permanently deletes all Personally Identifiable Information (PII) data associated with a Worker, including links to Worker documents. You need access to the *Purge Person Data* domain and the *Purge Supplier* sub-domain.

Concept: Managing Docs Templates

This table summarizes the primary actions you do when managing Docs templates from Workday Drive.

Action	Notes
Create a Docs template	From Drive, select Add New > Document Template and name the template. Select the source and category for the template, add content, and click Publish to make the content active. • Workday Docs doesn't support automatically converting a traditional Docs template (using text blocks and BIRT layouts) into a Docs template; you need to build them manually. • For DocuSign, you must use a name that is fewer than 100 characters. For Adobe Sign, names can't contain special characters such as the ampersand (&).
Copy a template	From Drive, select the Docs template and click Make a Copy.
Migrate a Docs template from 1 tenant to another	See Move Docs Templates Between Tenants on page 387.
Share a Docs template with unspecified users using a URL	1. Select a Docs template in Drive and click Share. 2. Enable the Link Sharing option. The ability to use link sharing is a system setting. If you don't see the option, check with your administrator. 3. Select the permission level. Everyone who accesses the Docs template using the link will have this level of access. 4. Click Copy Link. Give this URL to people you want to share the Docs template with. For more information about sharing, see the Drive User Guide.
Share a Docs template with specific users	Sharing with individual users enables you to set a specific permission level for the person and these settings remain active even if you turn off link sharing. 1. Select a Docs template in Drive and click Share.

Action	Notes
	2. From Share with Individuals, enter the users that you want to share with and select a permission level in the drop-down menu. 3. (Optional) Type a message for the users you're sharing with. The message displays in the Workday notification that the users receive after you click Share. When you share a Docs template with an individual user, the user receives a Workday notification and, if enabled on the tenant, an email. The user receives the notification whether or not they have access to the Drive domain, but they must have access to *Drive* and *Docs* domains on the System functional area to open the template. For more information about sharing, see the Drive User Guide.
Share a Docs template with security groups	Sharing with a group of users enables you to set a specific permission level for the group and these settings remain active even if you turn off link sharing. The ability to use group sharing is a system setting for each Drive item type. If you don't see the option, check with your administrator to ensure that it's enabled. 1. Select a Docs template in Drive and click Share. 2. From Share with Groups, enter the groups that you want to share with and select a permission level in the drop-down menu.
Preserve a previous version of the Docs template	You can copy the Docs template or download it in the DWXF file format if you want to preserve the current version of data or content, before updating it.
Remove a Docs template	From Drive, select the Docs template and click Remove. Drive moves the file to the trash. Note: Business processes continue to use removed Docs templates. Additionally, removed Docs templates continue to be selectable in the Configure Generate Document list. Before removing a Docs template, make sure you removed it from any business processes it's configured to. We recommend renaming the template after removing it, adding an indicator to the name that reminds you not to use it.
Recover a Docs template from the trash	From Drive, select Trash. Select the Docs template and then click Restore. Workday places restored file in the All Files view. If you select to remove a Docs template that was shared with you but you're not the owner, you remove your access to the template. The Docs template disappears from the Drive file list and it doesn't display in the trash.
Permanently delete a Docs template	Access the Drive Permanent File Delete task. Before you can permanently delete a Docs template, you must remove it from any business process it's attached to. It's not possible to permanently delete a Docs template that is, or has ever been, configured to a business process.
Manage templates in different languages	Templates in different languages need to be created and managed independently. Workday Docs doesn't support the concept of a translate instance as with traditional Docs templates and text blocks.

Concept: Editing Docs Templates

This table summarizes the primary actions you can take when working with Docs templates.

You can't change the source or category of a Docs template after you create it.

<table>
<tr><th>Action</th><th>Notes</th></tr>
<tr><td>Add text</td><td>
When you copy and paste from a text block to a Docs template, Workday doesn't preserve condition rules and data fields in the Docs template.
The Docs template editor and the PDF previewer use the Roboto font. The editor is in pixel units and the font selection can't be changed.
Workday Docs doesn't support reusable content among templates. Content that exists in multiple templates isn't linked and doesn't automatically update if you change it in 1 template.
The size limit for body content, including images, in the Docs template and the generated document is 30MB. When you try to insert content that exceeds the limit, Workday displays an error message and doesn't save the change.
</td></tr>
<tr><td>Manage headers and footers</td><td>
Click Layout > Headers & Footers to open the header and footer text editor.
To delete a header or footer, click the actions menu next to the header or footer and then click Delete. Docs doesn't support reordering headers and footers, so you need to delete and re-add them if you want to change the order.
Notes:

If you add more than 1 header or footer, you must add a condition rule to each header and footer.
When you preview a document, only 1 header or footer displays. Docs always shows the first header/footer listed until you hide its corresponding condition rule, then it shows the next header/footer listed until you hide its corresponding condition rule, and so on.
When generated, the first header and footer with a true condition rule displays. The user who has access to the document generation task can edit and delete headers and footers if there are multiple headers/footers with a true condition rule.
Header and footer settings apply to all pages; you can't control individual header and footer values per page.

Defaults:

Header Height: 96 pixels (or 1 inch)
Footer Height: 48 pixels (or 0.5 inches)
Left/Right Margins: 96 pixels (or 1 inch)

Maximum values:

Header Height (header + top margin): 234 pixels (or 2.44 inches)
Footer Height: 431 pixels (or 4.49 inches)
Left/Right Margins: 408 pixels (or 4.25 inches)
Overall size limit for all headers combined is 5MB.
Overall size limit for all footers combined is 5MB.

Minimum values:

Header Height (header + top margin): 2 pixels (or __ inches)
Footer Height: 2 pixels (or __ inches)
Left/Right Margins: 0 pixels (0 inches)

</td></tr>
<tr><td>Manage data fields</td><td>
To insert a data field, click Insert > Data Field. Highlight text, or place your cursor in the document, and click the + icon next to the data field.
To view all data fields added to the document, open the Manage Data Fields panel.
</td></tr>
</table>

Action	Notes
	To delete an individual data field, right-click the field in the editor and select Delete. To delete all instances of a data field, click the actions menu next to the data field in the panel and then click Delete. To replace all instances of a data field, click the actions menu next to the data field in the panel and then click Replace All. Find the new field, and when you click the Add (+) icon, Workday replaces all instances with the new field. Workday Docs doesn't support data fields that require prompts. Workday Docs doesn't support converting data fields; you need to redefine them in your Docs template. To create a new data field, you can navigate directly from the Insert Data Field dialog to the Create Data Field task by clicking Create New at the bottom of the dialog.
Manage condition rules	To insert a condition rule, click Insert > Condition Rule; start typing a rule name to find it. Click the + icon to add a blank condition rule (with no content), or highlight text in the document before clicking the + icon next to the condition rule. You can add a condition rule to all content types, including data fields. To view all condition rules added to the document, open the Manage Condition Rules panel. Click the eye indicator to display or hide content applied to the condition rule. To delete an individual rule, right-click the field in the editor and select Delete. To delete all instances of a rule, click the actions menu next to the data field in the panel and then click Delete. To replace all instances of a rule, click the actions menu next to the rule in the panel and then click Replace All. Find the new rule, and when you click the Add (+) icon, Workday replaces all instances with the new rule. To create a new condition rule, you can navigate directly from the Insert Condition Rule dialog to the Create Condition Rule task by clicking Create New at the bottom of the dialog. Docs doesn't support conditionally exchanging table cells, rows, or columns. Instead, we recommend either wrapping the content within the cell in a condition rule or wrapping the entire table in a condition rule and using 2 separate tables.
Manage language instances	To add a language instance, select Language > Add Language. To change the base language, select Language > Add Language and select the base language you want. After you change the base language, any new language instances that you create will contain the new base language content; existing template language instances will retain the same content. To delete a language instance, select it in the Languages dialog and click the X icon. You can't delete a language if it's assigned as the base; select another language as the base first.
Manage tables	To add a table, click Add table. A dashed line shows the table placement. In a table you can: • Add a column or row: Click the blue circle near a column or row.

Action	Notes
	• Set a cell color: With the cursor in a cell, click the Background Color icon and select a color. • Set a border color: With the cursor in a cell, click the Borders icon, then the Edit icon, and select a color. • Merge cells: Select the cells and click Merge cells. • Add a border: Select table cells or the entire table and click the Borders icon. By default, tables don't have borders. • Resize table columns: Hover over the column edge, click the resize indicator, and drag. • Delete a column or row: Click the blue line near the column or row and click Delete row or column. To delete the table: Click the blue circle in the table corner and click Delete row or column. About tables and condition rules: Workday Docs doesn't support the ability to conditionally use different table cells, rows, or columns. We recommend either wrapping the content *within the cell* in condition rules, or wrapping the entire table in a condition rule and creating a separate table for each condition.
Insert an image	Click Insert image and navigate to the image. • The maximum size for each image is 7MB. • You can upload up to 22MB of images to a template.
Insert page numbers	From the header or footer menu, click the Page Number icon to insert the page number. If you want to create a running page number and total, you can include text along with the page number values. Example: Page *Page [Current]* of *Page [Total]*.
Insert a page break	Click Insert Page Break.
Add a link	Click the Insert Link icon to add a URL directly into the text. Highlight text and then click the Insert Link icon to create a hyperlink in the text.
Lock content	Highlight text in the document and click Lock Content. After you lock content, users with access to the document generation step can't edit it; however, users can still delete text even if it's locked.
Change fonts	The Docs template editor and the PDF previewer use the Roboto font. Workday Docs doesn't support changing the font; however, you can change the text style (paragraph style and headlines).
Undo or redo your changes	To undo a change, press Ctrl+Z (Windows) or Command+Z (Mac). To redo a change, press Ctrl+Y (Windows) or Command+Y (Mac).
Preview a document	Click Preview. Use the Manage Condition Rule panel to show or hide content assigned a condition rule before previewing the document. Only 1 header or footer displays. Show or hide a condition rule to see the associated header or footer.

Reference: Docs Template Actions Available Based on Permissions

This table summarizes the actions available for Workday Docs based on the user's permission level in Drive. Keep in mind that this table covers only the permissions that you manage from Drive when sharing Docs templates.

Action	Can View	Can Edit	Owner
View Docs template.	X	X	X
View Docs template in preview mode.	X	X	X
Copy Docs template. Allowed for the Can View and Can Comment permissions only if the Docs template owner selected the Commenters and viewers can copy option when sharing the Docs template.	X	X	X
View list of specific users the Docs template is shared with.	X	X	X
Remove from shared Docs template access.	X	X	
Change share permissions. Allowed for the Can Edit permissions only if the Docs template owner selected the Editors can share option when sharing the Docs template.		X	X
Edit content.		X	X
Rename Docs template.			X
Move to trash and restore from trash.> Note: Only Drive administrators can permanently delete Docs templates from trash.			X

Reference: Business Processes That Support Docs for Business Processes

When you add the *Generate Document* action step to the definition of business processes that support Workday Docs, Workday recommends that you also add a *Review Documents* step to view the generated document.

You can use Workday Docs as part of these HCM business processes:

- *Absence Case Event*
- *Add Academic Appointment*
- *Add Additional Job*
- *Add Retiree Status*
- *Buy Time Off*
- *Change Job*
- *Change Organization Assignments for Worker*
- *Change Organization Assignments for Workers by Organization*
- *Close Position*
- *Contract Contingent Worker*
- *Correct Time Off*
- *Create Position*
- *Edit Hiring Restrictions*
- *Edit Position*
- *Edit Position Restrictions*
- *Edit Position Restrictions Additional Data*
- *Edit Worker Additional Data Event*
- *Employment Agreement*
- *Employee Contract*
- *End Academic Appointment*
- *End Additional Job*

- *End Contingent Worker Contract*
- *End International Assignment*
- *Freeze Position*
- *Hire*
- *Hiring Restrictions*
- *Manage Probation Period*
- *Mass Correct of Hire Business Processes*
- *Move to New Manager*
- *Move Worker (Supervisory)*
- *Move Workers (By Organization)*
- *Move Workers (Supervisory)*
- *Offer*
- *Onboarding*
- *One Time Payment for Referral*
- *Period Activity Pay*
- *Propose Compensation Change* (when used as a step in the *Change Job* business process)
- *Propose Compensation Hire*
- *Propose Compensation Offer/Employee Agreement*
- *Remove Retiree Status*
- *Remove from Matrix Organization*
- *Request Compensation Change*
- *Request Compensation Change for Leave of Absence*
- *Request Flexible Work Arrangement*
- *Request Leave of Absence*
- *Request One Time Payment*
- *Request One Time Payment Offer/Employee Agreement*
- *Request Reference Letter*
- *Request Return from Leave of Absence*
- *Request Time Off*
- *Review Probation Period*
- *Sell Time Off*
- *Service Dates Change*
- *Start International Assignment*
- *Start Performance Improvement Plan*
- *Switch Primary Job*
- *Termination*
- *Title Change*
- *Update Academic Appointment*
- *Wage Theft Prevention Notice*

Related Information

Concepts

Concept: Review Documents Step on page 985

Tasks

Configure Generated Documents on page 1122
Steps: Set Up Docs for Business Processes on page 385

Docs for Layouts

Setup Considerations: Docs for Layouts

You can use this topic to help make decisions when planning your configuration and use of Docs for Layouts. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Docs for Layouts is a visual editing tool for creating document layouts. A document layout is a specific design for a PDF that uses data from a Workday report. You can use Docs for Layouts to create customized layouts for your custom advanced reports.

Docs for Layouts is an alternative method for creating layouts to that of using Report Designer (BIRT) and supports several types of documents and applications. The Docs for Layouts editing interface is user-friendly in comparison to BIRT, and since you create document layouts from the Workday user interface, not an external tool, you don't need to deploy your layout to Workday.

To use Docs for Layouts, you should understand the concepts of Workday reports, business objects, data fields, and conditional logic. You don't need to know the details of creating, copying, and editing Workday reports, but you do need to understand the underlying report data fields and available conditions that you can add.

You can create and manage document layouts using Docs for Layouts in addition to managing designs using Report Designer (BIRT). When you create a business form layout, you can select either a document layout or a report design file as the source. In many cases, you might choose to use Docs for Layouts to create document layouts because of its ease of use. However, if your document has special requirements that Docs for Layouts doesn't currently support, you can continue to use a report design. For more information about product limitations, see *Limitations*.

Business Benefits

Docs for Layouts gives you control over the exact layout and composition of your PDFs. It enables you to tailor your presentation of Workday data to your exact business requirements.

You can use Docs for Layouts to customize:

- Rich text formatting
- Tables
- Images
- Headers and footers
- Page breaks
- Page settings (page size, orientation, margins)
- Background images
- Data fields and conditional text

Use Cases

You can use Docs for Layouts when you want to:

- Create a layout for a custom advanced report you've created in Workday.
- Override the existing business form layout for a report or other type of print action.

Docs for Layouts is available for advanced custom reports for specific supported data sources. See Reference: Supported Data Sources in Docs for Layouts for more information.

Questions to Consider

Question	Considerations
Do existing Workday report layouts meet my needs?	If every Workday report you run has a delivered layout that meets your needs, you don't need to use Docs for Layouts.
Do I need the additional functionality of Report Designer/BIRT for my document layouts?	Docs for Layouts doesn't support all the functionality of BIRT. There might be situations where you'll need to continue using Report Designer. Review the limitations to determine if Docs for Layouts will be a good fit for your use case.
How does my workflow differ between using Report Designer and using Docs for Layouts?	• When developing your document layout, all your work will occur in the Workday environment; you will not use Workday Studio and Report Designer. • In many cases, when creating a business form layout, the workflow remains the same except that instead of selecting a report design for the business form layout, you select a Docs for Layouts document layout.

Requirements

Docs for Layouts requires that you:

- Use a single, advanced custom report that contains the data you want to include in a document layout.
- Enable the report for Web Services, by checking the *Enable for Web Services* option in the Advanced tab of the report.
- Share the report with users who will create document layouts based on the report.
- Give security group access to users so they can see the relevant data sources, fields, and tasks related to the document layouts they'll work on.

Limitations

- Layouts created with Report Designer can't be automatically converted into the Docs for Layouts format. You must create new document layouts manually.
- Content can't be automatically reused between document layouts. If the same content is used in two document layouts, you need to update it in both.
- Only one font is available. The document layout editor, preview PDFs, and generated PDFs use the Roboto font.
- JavaScript can't be used. For layouts that need JavaScript you must use Report Designer.
- Bulk printing that runs longer than 12 hours will not complete. Large batch sizes of more than 50,000 documents may have performance issues and need to be grouped into smaller batches for printing.

- The following functionality is not currently supported:
    - Comparative expressions in conditions (such as: if [value] is greater than [value])
    - Data manipulation (such as: aggregate rows (sum, total, etc.), table grouping, table sorting)
    - Right to left languages
    - Localization
    - Precise positioning of content
    - Charts, graphs, and data visualizations
    - Versioning and history
    - Printing with attachments
    - Consolidated print
    - Calculated page breaks
    - Newspaper-style columns
    - Password protection on PDFs
    - MICR codes for verifying checks
    - Barcodes and QR codes
    - eSignature integration
    - XML Alias overrides
    - Import files
    - Image tokens

Tenant Setup

For some application implementations, to use the custom layouts from Docs for Layouts you must override Workday-delivered layouts in the relevant functional area.

Security

Domain	Considerations
Docs for Layouts	Provides access to Docs for Layouts to design layouts for printed documents.
Custom Report Creation	Enables you to create and modify custom reports.

To generate a PDF from a report, you must have security permission to view all of its fields, so self-service isn't always possible. Example: An Administrator might need to generate Compensation Statements because individual workers lack security for some of the relevant fields.

Business Processes

You can use a document layout in a business process by adding a Report step and specifying the custom report to run and the business form layout to use for the output.

Reporting

You can base your document layout on the data in any single advanced custom report. You can't have data from multiple reports in a single layout.

Steps: Set Up Docs for Layouts

Prerequisites

- Security: *Security Configuration* domain in the System functional area.

Context

Docs for Layouts enables you to automate the generation and printing of documents using Workday data. Docs for Layouts is an alternative to using Report Designer (BIRT) to create document layouts. Docs for Layouts supports several types of document printing workflows, specifically workflows that use data fields and condition rules from advanced reports.

The *Docs for Layouts* security domain in the System functional area manages the ability to use Docs for Layouts document layouts. When setting up Docs for Layouts, add all users who create, edit, or access Docs for Layouts document layouts to the *Docs for Layouts* security domain.

The *Custom Report Creation* security domain in the System functional area manages the ability to view business form layouts, run reports, and click the Print button to generate a PDF. When setting up Docs for Layouts, add all applicable users to the *Custom Report Creation* security domain.

Steps

1. Create security groups for users who will be working with Docs for Layouts document layouts and printing documents. Currently only unconstrained groups are supported.
2. Create or edit a security policy for the *Docs for Layouts* domain in the System functional area
    a) Access the View Domain report.
    b) Select the domain from the Domain prompt.
    c) From the related actions menu, select Domain > Create Security Policy, or select Edit Security Policy Permissions if there's an existing policy.
    d) In Report/Task Permissions, add or edit security groups.
    e) Select the View and/or Modify check boxes as needed.
    f) As a related action on the domain security policy, select Domain Security Policy > Enable .
3. Activate Pending Security Policy Changes.
4. (Optional) Confirm or update the languages that you want to make available as language instances in document layouts by viewing the Languages section on the *Edit Tenant Setup – Global* task.

    See Reference: Edit Tenant Setup - Global.

Related Information

Examples

2024R1 What's New Post: Workday Docs for Layouts

Create and Publish Document Layouts in Docs for Layouts

Prerequisites

Security: These domains in the System functional area:

- *Docs for Layouts*
- *Custom Report Creation*

Make sure that the advanced report you want to use as the source of data for a document layout is enabled as a web service. Docs for Layouts only supports advanced reports.

Context

Docs for Layouts enables you to design, create, and preview document layouts for custom advanced reports in Workday. You can include content (such as text, tables, images, headers, and footers), add new pages, adjust page settings, and preview the layout as you build it. You can also insert data fields and apply condition rules. After you publish the document layout, you can select it in a business form layout for use when you print your documents.

Steps

1. Access the Create Document Layout task and type a name for the document layout.
2. Select a custom report to use as the source for data. The report defines the data fields and condition rules available in the document layout and the data included in the generated document. To change the report selected for the Source, click File > Change Data Source.

   Note: Changes made in the report are reflected in the associated document layout. You can use the Edit Document Layout task to open the document layout, review data fields and condition rules, and make updates as necessary.
3. (Optional) Change the base language of the layout by clicking Language > Manage Languages, adding a new language, and selecting it as the base.

   We recommend setting the base language before adding content. When you add a new language instance, Docs for Layouts copies the content from the base language to use as the starting point for the translated language instance.
4. Insert text, tables, and images and design the layout for your document.

   The document layout is initially in an unpublished state and an Unpublished Changes indicator displays at the top. You must publish the layout first before you can select it for use when printing a document.
5. (Optional) Add language instances for the document layout by clicking Language > Manage Languages.

   When you add a new language instance, Docs for Layouts copies the content present in the base language. Workday doesn't automatically translate text into a new language. Instead, you must manually replace it with text that has already been translated.
6. (Optional) Click Preview to upload an XML file and generate a PDF preview to see how the document layout looks with actual data.
7. Click Publish to make the current content active and display the Published indicator at the top. After you publish the document layout, it becomes available for selection when printing documents. If you have added multiple language instances, you must publish each language separately.
8. Make additional edits as needed. As soon as you make a change, the Unpublished Changes indicator displays at the top. Changes aren't applied and used in associated print actions until you click Publish again.

Next Steps

If your workflow uses a business form layout when you print documents:

- Access the Create Business Form Layout task (or the Edit Business Form Layout task).
- Select the Active check box.
- Select the Document Layout option and choose the appropriate document layout.

Preview a Document Layout with Report Data in Docs for Layouts

Prerequisites

Security: These domains in the System functional area:

- *Docs for Layouts*
- *Custom Report Creation*

For any report containing data that you want to use as preview data in a document layout, make sure:

- The report is a custom report of the *Advanced* report type.
- The report is enabled for Web Services. (On the Advanced tab of the report definition, select the Enable As Web Service option.)
- You are either the report owner or the report owner shared the report with you.

Context

You can generate a PDF preview to see how a document layout looks with actual data. You run the custom report, save the data as an XML file on your local drive, and then upload the XML file to generate the preview document. When generating the XML file to upload for the preview, include only a single row of data, or the previewed document will contain data from all rows. Preview supports static images that you upload but doesn't support dynamic image placeholders.

Steps

1. From the document layout, open the Source report that you want to use as preview data.
2. Select Custom Report > Run from the related actions menu on the report.
3. Select any appropriate prompts and click OK.
4. From the report, select Web Service > View URLs from the related actions menu.
5. Select any appropriate prompts and click OK.
6. In the Workday XML section select REST Workday XML. The XML source code displays in a new browser tab.

   Note: If Workday prompts you for credentials, enter the same username and password that you use to log in.
7. Right-click in the area containing the XML and then Save as... to save the data as an XML file.

   Note: The Workday XML content that you save contains data returned by the report. Consider security and privacy policies when deciding where to store the XML file and who should have access to it.
8. From the document layout, click Preview.
9. Click Upload, navigate to the XML file you saved, and click Open. Alternatively, you can select XML files that were previously uploaded.

   A popup displays while the preview generates. When the preview is ready, it displays in a new browser tab. You might need to disable your browser pop-up blocker if it prevents the preview from displaying.

Concept: Managing Document Layouts in Docs for Layouts

This table summarizes some of the actions that you can take when managing document layouts.

Action	Notes
Create a document layout	Access the Create Document Layout task and select a custom report to use as the source of data. Insert text, tables, and images and click Publish to make the content active. The source report defines the data fields and condition rules available in the document layout, and the data included in the generated document. Docs for Layouts only supports advanced reports.
Edit a document layout	Access the Edit Document Layout task, select the layout, and make edits as needed. Changes aren't applied to the layout or used in associated print actions until you click Publish again.
Change the report data source for the document layout	To change the report selected for the Source, click File > Change Data Source. You must remove a document layout from any Business Form Layouts that it is associated with before you can change the report data source.

Action	Notes
	When you change the report, data fields used in the document layout that don't exist in the new report display error messages and can be removed or replaced.
Copy a document layout	Access the Copy Document Layout task and select the layout to copy. The new layout will use the same custom report as the original layout. All language instances are copied as well.
Delete a document layout	You can't delete a document layout once you've created it, but you can deactivate it.
Deactivate the document layout	To deactivate the document layout, click File > Deactivate Layout. You must remove a document layout from any Business Form Layouts that it is associated with before you can deactivate it. Deactivated document layouts don't display in Business Form Layout selection lists and can't be selected. You can edit deactivated document layouts, but you can't publish them. To reactivate a document layout, click Activate Layout.
Migrate a document layout	You can migrate a document layout between tenants using Object Transporter (OX) and the Implementation Type of *Document Layouts*.
Make a document layout available for report printing	Access the Create Business Form Layout task and from the Source field, select a Docs for Layouts document layout. Select the same custom report for both the document layout and the business form layout.
Manage document layouts in different languages	To add a language instance, select Language > Manage Languages and search for the language you want to add. Then customize the instance by manually replacing the original content with text translated in the new language.
Download document layout support files	Click File > About > Download Files for Support to download a document layout to assist with troubleshooting issues. Downloaded support files should not be used to back up data.

Concept: Editing Document Layouts in Docs for Layouts

This table summarizes some of the actions that you can take when editing document layouts. For more details, see the Docs for Layouts User Guide, which you can access from the Docs for Layouts user interface by clicking Help > User Guide.

Action	Description
Manage document settings	Click the Document Settings icon on the left side of the editor to open the right panel. You can edit the: • Page size • Page units • Page orientation • Page margins
Insert headers and footers	Click the Headers icon or Footers icon on the left side of the editor and then click Insert Header or Insert Footer. Insert a text, image, table, or horizontal line element and use the Format tab in the right panel to format it.

Action	Description
	To move a header or footer up or down, click an arrow to the left of the header or footer, or select Move Up or Move Down from the related actions menu in the right panel. To delete a header or footer, first click any area outside of the header or footer. Then select Delete Header or Delete Footer from the related actions menu in the right panel.
Insert page numbers	Select the text or table element in the header or footer where you want to insert the page number. Click the Page Numbers icon in the toolbar and select Current Page and/or select Total Pages.
Insert pages	The page area automatically extends when you add content in a document layout and, when you print the document, page breaks are automatically created. To manually add a new page, click Add New Page at the end of a layout below the existing content. New pages are added at the end of a layout; you can't insert pages in between other pages. To delete a page, click the page to delete. From the Format tab in the right panel, click Delete.
Insert background images	Select Insert > Background Image and select the page where you want to insert the background image. Click Select Image, choose the image, and click Save. To have a background image display on multiple pages, you must manually add a new page and then add the background image to each page separately. To delete a background image, select Insert > Background Image and click Delete Background Image.
Insert text, tables, and images	Click the Insert Text, Insert Table, Insert Image, or Insert Horizontal Line icon on the left side of the editor. Move the cursor over the top, bottom, or side edge of an existing element. A blue indicator displays to show the locations where you can click to insert the element. To delete an element, select it and click Delete from the Format tab in the right panel. To move an element, select it and click Move from the Format tab in the right panel. Move the cursor to the new location and click to place the element.
Insert dynamic data fields	Click in the text area of a text or table element. From the Dynamic Data tab in the right panel, click the + icon next to the data field that you want to insert. The data field displays in the element as text with a dotted underline and green background. To delete a data field, select it and press the Delete key. To replace all instances of a data field with a different one, locate the data field in the Dynamic Data tab in the right panel. From the related actions menu next to the data field in the panel, click Replace All. Then locate the new data field to insert and click the Replace Data icon.
Insert dynamic check boxes	Click in the text area of a text or table element and click the Check Box icon in the toolbar. Select the boolean data field for the check box and click Insert. The check box displays in the layout as checked with a green background. When you print the document layout, the check box will display as checked (true) or unchecked (false) depending on the data field it is associated with.

Action	Description
	To delete a check box, click it and then press the Delete key.
Insert dynamic images	You can insert a placeholder for an image that is associated with a data field, such as an employee photo. Image placeholders are contained within their own element and can be placed anywhere on the page like a text, table, and image element. Locate the dynamic image in the Dynamic Data tab in the right panel and click the Image Placeholder icon (a square with + sign) next to the image that you want to insert. Move the cursor over the top, bottom, or side edge of an existing element. A blue indicator displays to show the locations where you can click to insert the image placeholder. The image placeholder displays as an empty rectangle with a green background. To delete an image placeholder, select it and click Delete from the Format tab in the right panel. To move an image placeholder, select it and click Move from the Format tab in the right panel. Move the cursor to the new location and click to place the image placeholder.
Apply a condition rule	If the report associated with the document layout has boolean (true/false) data fields, those fields are automatically available for you to use as condition rules and you can apply them in the layout to show and hide content. You can also use the numeric, text, self-referencing, and single instance data fields in the report to create custom condition rules. If the condition is true when the document is generated, the conditionalized content displays, and if the condition is false, the content is hidden. To apply a condition rule to content, select the text or element. From the Conditions tab in the right panel, click the + icon next to the condition that you want to apply. The colored eye indicator that displays next to the condition matches the background color of the text or element on the page where you applied it. Click the eye indicator to show or hide the associated content on the page.
Insert subtotal values	You can group and subtotal data in a table that includes repeating data rows and numeric or currency data fields. When you create the table row, insert the repeating data field to group by in the first column and insert a numeric or currency data field to subtotal by in the last column. Then select the table row you want to subtotal and click the Subtotal Repeating Row toggle in the Format tab on the right panel.

Concept: Viewing Document Layout Details in Docs for Layouts

The Document Layout Details report is secured to the *Docs for Layouts* domain. You can use this report to view document layout metadata, change the report data source for a document layout, and deactivate a document layout.

This table summarizes the information in the report:

Field	Description
Document Layout	(Magnifying glass icon) A link to the document layout.
Name	The name of the document layout.

Field	Description
Active	The status of the document layout. A document layout can have a status of Active or Inactive.
Created By	The person who created the document layout.
Created Date and Time	The date and time the document layout was created.
Last Updated By	The last person who updated the document layout.
Last Updated Date and Time	The last date and time the document layout was updated.
Custom Report	A link to the report associated with the document layout.
Base Language	The default or preferred language of the document layout.
Published	The status of the document layout. A document layout can have a status of Published or Unpublished.
Images	Links to the images in the document layout.
Business Form Layout	Links to any Business Form Layouts associated with the document layout.

Changing the Source Report and Deactivating a Document Layout

You must remove a document layout from any Business Form Layouts that it is associated with before you can change the report data source or deactivate it.

Action	Description
Change Report	Click Change Report to change the report data source for the document layout. When you change the report, data fields used in the document layout that don't exist in the new report display error messages and can be removed or replaced.
Deactivate Layout	Click Deactivate Layout to deactivate the document layout. Deactivated document layouts don't display in Business Form Layout selection lists and can't be selected. You can edit deactivated document layouts, but you can't publish them. To reactivate a document layout, click Activate Layout.

Concept: Language Instances for Translated Document Layouts

You can design and customize content for multiple languages in a single Docs for Layouts document layout. You can select the languages that are available to add to the layout from the Languages section on the *Edit Tenant Setup – Global* task. Docs for Layouts doesn't support right-to-left (RTL) language formatting.

When you create a document layout, Docs for Layouts assigns a base language of English. To add a language instance, select Language > Manage Languages and search for the languages you want to add. When you add a new language instance, Docs for Layouts automatically copies the content that is present in the base language at the time you add the instance.

Workday does not automatically translate text into a new language. Instead, you customize each language instance by manually replacing the original content with text that has already been translated. If you want styling, layouts, data fields, or condition rules to apply across all language instances, you need to set them up in the base language before creating the language instances. Deleting a language from the Language > Manage Languages modal permanently removes all the content in that language instance from the document layout.

When you publish a document layout, you must publish each language instance separately as well. Data field and condition rule formatting in generated documents are based on the recipient user's location and not the language instance of the layout. If you don't add an instance for a document recipient's language in the document layout, the document will be generated using the base language.

Concept: Printing Reports Using Docs for Layouts

When you print a report, the size of the associated document layout and the complexity of the content affect the outcome. Some factors that influence it include:

- The number of rows that the report returns.
- The number of pages created by each report row.
- The number of images included in the document layout.
- The size of static images uploaded and added to the document layout. (The maximum size is 1 MB for each image.)
- The size of images dynamically added to the document layout. (The maximum size is 10 MB for each image.)
- The size of the report data XML. (The maximum size is 30 MB. You can use these steps to download the XML file and view the file size.)
- The overall size of the document layout.

Reports That Return Multiple Rows

When you create a business form layout and associate a custom report with a document layout, the Apply Report Design separately to each row (ADPR) option is automatically selected. The ADPR option ensures that if a report that returns multiple rows is printed, the document layout is applied to each report row and then all rows are merged into a single PDF document.

The results from printing reports can vary. For example: A document layout that has one image but outputs 10 pages for each report row might print only 100 rows. However, a document layout that doesn't have any images and outputs only 1 page might print up to 1,000 rows. Workday recommends that you optimize image sizes and conduct a print test for the number of report rows you expect to support in order to avoid any print issues.

This table provides examples of printing outcomes for several use cases. Results are updated as enhancements improve performance.

Use Case	Number of dynamic data fields	Images	Size of document layout	Number of rows supported
New Hire Letter A	20	Multiple images with a total size of 125 KB	388 KB	250
New Hire Letter B	40	None	25 KB	400
Compensation Statement A	50	Multiple images with a total size of 1.17 MB	1.7 MB	75
Compensation Statement B	40	Multiple images with a total size of 390 KB	615 KB	170
Employee Review	100	None	180 KB	300
Talent Card	20	None	122 KB	350
Invoices	30	One image with a total size of 34 KB	150 KB	300

If your report returns significantly more rows than what is listed, or you receive an error message stating the size of the document layout is too large, you might need to print the document using a BIRT report design.

Batch Printing

Batch printing is the process of breaking up a large set of documents into smaller sets and then printing those smaller sets of documents simultaneously. For reports that use document layouts, printing that runs longer than 12 hours will not complete. Large batch sizes of more than 50,000 documents may have performance issues and need to be grouped into smaller batches for printing.

Reference: Supported Data Sources in Docs for Layouts

Docs for Layouts is available for advanced custom reports that use the following supported data sources:

- Compensation Review
    - Compensation Review Employee Adjustment for Statements
- Supplier Remittance
    - Payments for Remittance
- Employee Reviews
    - Employee Review Printout
- Talent Cards
    - Talent Review Documents for Talent Card for Review Printing Run
    - Workers for Talent Card for Worker Printing Run
- Invoices
    - Customer Invoices for Print Run
    - Customer Invoices for Print Run as of Approval Date
    - Customer Invoice Printing Run Group
    - Customers for Customer Statement Printing Run
    - Dunning Letter Printing Run
    - Dunning Letter Printing Run Group
- Learning
    - Learning Enrollments
    - Learning Record

Drive

Steps: Set Up Security for Drive

Prerequisites

- Security: *Security Configuration* domain in the System functional area.

Context

Drive enables you to manage access to, and security for, many file types, such as Microsoft® file types, PDFs, images, and media files. Additionally, you can create, share, and manage Workday files such as Worksheets workbooks, Slides presentations, notification templates, and discovery boards.

If you are using Drive with integrating applications such as Worksheets, Notification Designer, or Discovery Boards, remember to configure security for the integrating app in addition to configuring Drive permissions.

Keep in mind that Drive doesn't support:

- Using delegation to give access to Drive items.

- Access restrictions in authentication policies.
- Using constrained security groups to manage who you can share its primary file types with; these file types include workbooks, videos, images, PDFs, and others.
- Segmented security, which is a way to grant a group of users access to specific items. Instead, we support sharing items with unconstrained security groups.

Steps

1. Create security groups for your Drive administrators and users.

   Use these security group types:

   - *Public groups*
   - *Role-based (constrained) groups*
   - *Unconstrained groups*

   Keep in mind that Drive supports applications, such as Worksheets for embedded integrations, which require that you add constrained security groups to the Drive domain, and to related domains. However, Drive doesn't support using constrained security groups to manage sharing of its primary file types; these file types include workbooks, videos, images, PDFs, and others.
2. Create or edit a security policy for these domains and add permissions:

   - *Drive*
   - *Drive Administrator*
   - *Reports: Drive Admin*
   - *Reports: Drive User*
   - *View Drive File and Media* (optional)
   - *Drive Web Services* (optional)

   See Reference: Security Domains and Drive Item Management on page 441.

   a) Access the View Domain report.
   b) Select the domain from the Domain prompt.
   c) From the related actions menu, select Domain > Create Security Policy, or select Edit Security Policy Permissions if there's an existing policy.
   d) As applicable, in Report/Task Permissions, add or edit security groups.
   e) Select the View and Modify check boxes.

      Note: In the domain setup, you must select both View and Modify. You can't use these settings to manage file access permissions in Drive. You select view and edit permissions for individual files when you share them.
   f) As a related action on the domain security policy, select Domain Security Policy > Enable.
3. (Optional) Enable Workday Media to upload and manage video files in Drive. See Setup Considerations: Workday Media Cloud on page 447.
4. Activate Pending Security Policy Changes.
5. (Optional) Set Up Group Sharing for Drive on page 414.

Related Information

Reference

Reference: Security Domains and Drive Item Management on page 441

Steps: Set Up Drive

Prerequisites

- Steps: Set Up Security for Drive on page 410.
- Security: *Security Configuration* domain in the System functional area.

Context

Drive consolidates file management for several file types, such as Worksheets workbooks, notification templates, Microsoft® files, images, and media files.

The file types that you choose to support in your tenant, using the Edit Tenant Setup - System task, are also supported by Drive. When configuring file types to support, we recommend that you either select to support all types, or add the Workday product-specific file types into the supported file types list. (Product-specific files are Workday files that you use Drive to manage, such as document templates, notification templates, Slides presentations, and Worksheets workbooks/templates.)

Steps

1. Access the Edit Tenant Setup - System task.

   In the System Setup section under File Type Setup Instructions, in addition to any other file types that you want to support in your tenant, select the file types you want your users to be able to manage in Drive, or select Allow All File Types.

   Drive supports these file types:

   - BMP
   - CSV
   - DOC
   - DOCX
   - DWXF (Workday Docs templates)
   - GIF
   - HTM
   - HTML
   - JPEG
   - JPG
   - JWF
   - LPXF (Slides presentations)
   - NDXF (Notification Designer templates)
   - PDF
   - PNG
   - PPT
   - PPTX
   - SVG
   - TIF
   - TIFF
   - TSV
   - WXF (Worksheets workbook files)
   - XLS
   - XLSM
   - XLSX
   - XLTM
   - XLTX

   See Reference: Edit Tenant Setup - System on page 164.

   This list of file types doesn't apply to discovery boards, or to media files (videos and packaged content). Discovery boards are supported automatically. Workday enables or disables media file usage based on the status of the Workday Media Cloud Terms and Conditions order form.

   For a list of media file types that Workday Media Cloud supports, see FAQ: Uploading and Viewing Videos on page 455.

2. (Optional) Access the Edit Tenant Setup - System task and select or clear these options:

Section	Option	Description
Mobile	Enable Attachments to be Imported From or Shared With External Sources	Enables users on mobile devices to share and import attachments into Drive from sources such as iCloud™, Dropbox™, and Google Drive™. Consider the security risk of adding files to Drive from outside Workday, such as files that haven't been screened for viruses. The default setting doesn't permit importing attachments.
Drive Settings	Disable Workbook Download	Prevents users from downloading Worksheets workbooks out of Workday. Example: If selected, users can't download workbooks to Microsoft® Excel®, PDF, or CSV. After you change this setting, there might be a delay of up to 65 minutes before the change takes effect. Workbook download is enabled by default. Drive doesn't adhere to access restrictions in authentication policies at this time.
Drive Settings	Disable Slides Download	Prevents users from downloading Slides presentations out of Workday. After you change this setting, there might be a delay of up to 65 minutes before the change takes effect. Presentation download is enabled by default. Drive doesn't adhere to access restrictions in authentication policies at this time.
Drive Settings	Disable link sharing in Drive	Prevents file owners and authorized editors from enabling link sharing for individual files. Link sharing is enabled by default. When you change the setting, a delay of up to 65 minutes might occur before the change takes effect. If you change the setting from enabled to disabled, any workbooks that users already shared using a link remain shared. Drive supports link sharing for these item types: • Nonmedia files such as Worksheets workbooks, PDF, JPG, and DOCX • Media files such as MP4, MOV, and packaged content Drive doesn't support link sharing for these item types: • Discovery boards • Folders
Drive Settings	Allow viewers and commenters to download and copy media	Allows users with View or Comment permission on media files to download or copy them, if the owner selects the corresponding option in the Advanced area of the Share dialog. Users might need to refresh the browser to see a change in the setting. If any downloads are in progress when you change the setting, they'll continue.

Section	Option	Description
		If you don't enable the setting, the owner's option in the Share is grayed out (not selectable).

3. (Optional) Access the Edit Tenant Setup - Notifications task.

   On the System tab, select whether to send email notifications for these types of actions:

   - Drive Access Additions
   - Drive Access Changes
   - Drive Access Removals

   See Reference: Edit Tenant Setup - Notifications on page 107.

   Example: If user A shares an item with users B and C, the Drive Access Additions setting determines whether Drive sends an email notification to users B and C. If user A gave edit access initially and later decides to change user B's access to view, the Drive Access Changes setting determines whether user B gets an email about that change. If user A decides to remove user C's access to the item, the Drive Access Removals setting determines whether user C gets an email notification.

   Regardless of the email notification setting, Workday adds notifications to the Notifications page for these actions.
4. If Drive hasn't been translated into the language that a user selected as their display language, your security administrator must access the Edit Workday Account task for the user and select the Allow Mixed-Language Transactions option. This makes the Drive user interface visible to the user in English.

   See Steps: Manage Translations on page 360.

Related Information

Reference

Reference: Security Domains and Drive Item Management on page 441

Workday 33 What's New Post: Drive

The Next Level: Drive FAQ

The Next Level: Drive Overview and Drive Administration

Set Up Group Sharing for Drive

Prerequisites

- Security: *Drive Administrator* domain in the System functional area.
- For each security group that you want to share items with, make sure that the group is in both:
  - The Drive domain.
  - The domain for the item type you want to share. For example, if you want to share Worksheets workbooks with a security group, the security group must have access permissions for the Worksheets domain.

Context

You can let self-service users share items of specific types with one or more security groups. A user can share items of that type with the group, even if the user who shares the item isn't a member of the group.

If you decide not to configure group sharing, the option won't display in the Share dialog. Drive will continue to allow only sharing with individuals, and sharing using a link/URL.

The table below identifies item types and the security groups you can share with. Keep in mind that although Drive itself doesn't allow sharing with constrained security groups, some Drive application integrations do allow constrained group sharing. If that's the case, the group displays in the selectable list of security groups. Example: Worksheets doesn't allow sharing with constrained security groups, but some applications that integrate Worksheets into their workflow do allow it.

You can configure:

- Role-based groups if they meet the restrictions defined in the table.
- Public groups for all item types except document templates and notification templates, if they meet the restrictions defined in the table.

Drive doesn't support group sharing with Intersection Security Groups.

Item Type	Security Group
Discovery Board	Any security group in the system. To share with View permission, the group must have access to at least 1 data source used in the board. To share with Edit permission, the group must have Modify access to the *Discovery Board: Create* domain.
Document Template	Any unconstrained group added to the security policy for the Docs domain.
File	Any unconstrained group added to the security policy for the Drive domain.
Folder	Any unconstrained group added to the security policy for the Drive domain.
Media	Any unconstrained group added to the security policy for the Drive domain.
Notification Template	Any unconstrained group added to the security policy for the Notification Designer domain.
Presentation	Any unconstrained group added to the security policy for the Slides domain.
Workbook	Any unconstrained group added to the security policy for the Worksheets domain.

Configuration considerations:

- Educate your self-service users on when group sharing is appropriate.
- When configuring groups for group sharing, make sure all the group members know about their own membership in the group, and they're familiar with who else is in the group.
- If you're creating security groups to configure for group sharing, give them meaningful names that are understandable by self-service users.
- If you used a large group like All Workers to grant access to an application, consider adding smaller groups to meet your needs for group sharing use cases. Example: Instead of selecting to enable group sharing for the All Workers security group, you might want to limit it to the Recruiters group.

Steps

1. Access the Configure Group Sharing in Drive task.

2. (Optional) Select the Only Admins Can Group Share check box.

   When selected, the configuration that you set up in the rest of these steps will apply only to Drive administrators; group sharing search won't be visible to self-service users.

   If you limit group sharing to administrators, then:

   - Only Drive administrators who have Edit access or higher to a Drive item can share that item with a security group.
   - Self-service users won't see the Share with Group option in the Share dialog.
   - Self-service users can be the recipients of group shared items, and they can see which items were shared with them as part of a group, but they can't modify or remove their sharing permissions.
3. Add each item type that you want to be sharable with a security group, then select which security groups the items can be shared with.

   By default, after you select the item type, all security groups with access permission for that item type automatically display. Delete any security groups that you don't want users to share with.

   The File item type is associated with any file type that doesn't fall into a more specialized category in Drive; in other words, these are the file types that you enable in Workday using the Edit Tenant Setup - System task, in the File Type Setup Instructions section. When you enable group sharing for the File item type, you're enabling group sharing for all of these file types.

   For the Folder item type, if you enable group sharing and then a user shares a folder with a group, the permissions propagate to the files in the folder whether or not the individual file's type was enabled for group sharing. Example: Media files in a shared folder inherit permissions based on the shared folder's setting, even if the media file type isn't specifically enabled for group sharing.

Result

Self-service users see these changes in the user interface after you enable group sharing, if you didn't limit it to administrators:

- Any Drive user will see the Share with Groups section of the Share dialog when they choose to share a Drive item.
- Drive users can start typing a group name into the Share with Groups field to see which groups they can share with.
- Drive users can view and manage what groups have access (and the level of access) to a group-shared item in the Who Has Access tab of the Share dialog.
- When a user gains or loses membership to a group, they automatically gain or lose access to items that someone shared with that group.
- Unlike sharing with individual users, when you share an item with a group, Workday doesn't send notifications. You might want to notify people that you shared an item with them. Example: If you shared a Worksheets workbook with a group, you can send then an email containing a link.

Set Up Sharing with Non-Workers

Prerequisites

- Security: *Drive Administrator* domain in the System functional area.
- Any non-workers that you want to share with must have Workday credentials and be and be set up according to tenant requirements; for example, implementer users must be set up using the Create Implementer task and be in the Implementers security group.
- For each non-worker type that you want to share items with, make sure that the non-worker has access to all appropriate domains:
  - The *Drive* domain.
  - The domain for the item type you want to share. For example, if you want to share Worksheets workbooks with an implementer, the implementer must have access to the *Worksheets* domain.

Context

When you enable non-worker sharing, users can share Drive items with these types of non-worker accounts:

- Extended Enterprise Learner
- Implementer
- Service Center Representative
- Customer Central

You enable sharing with non-worker users based on unconstrained security groups. Users in the selected unconstrained security groups can search for non-worker accounts in the Share dialog, and then add or change their permissions for any Drive item type.

Non-worker users receive the same type of notification as regular users when a user shares a Drive item with them.

Steps

1. Create a security policy for these domains and add permissions:
   - *Drive: Search for Extended Enterprise Learners*
   - *Drive: Search for Implementers*
   - *Drive: Search for Service Center Representatives*

   a) Access the View Domain report.
   b) Select the domain from the Domain prompt.
   c) From the related actions menu, select Domain > Create Security Policy.
   d) In Report/Task Permissions, add the unconstrained security groups that you want to enable for non-worker sharing.
   e) Select the View and Modify check boxes.

      Note: In the domain setup, you must select both View and Modify. You can't use these settings to manage file access permissions in Drive. You select view and edit permissions for individual files when you share them.
   f) As a related action on the domain security policy, select Domain Security Policy > Enable.
2. Access the Activate Pending Security Policy Changes task to confirm changes.

Result

When users in the enabled security groups select to share a Drive item, and then search for users, they'll see non-workers displayed along with standard users in the Share dialog search results. Non-workers are displayed with a red user name and an icon that includes an arrow on the bottom right.

View All Drive Items for a User

Prerequisites

Security: *Drive Administrator* domain in the System functional area.

Context

Use this report to view a list of the Drive items a user owns, and items the user has access to because another user shared them.

Example: You might want to use this report after a user leaves the company, to:

- Confirm whether or not the user manually transferred all the files they own before leaving.
- View the list of files to determine the most appropriate user to transfer any owned files to.

Steps

1. Access the View Drive Items for User report.
2. Select the file types and permission levels to view.

   The list of item types varies depending on your tenant setup.

   - Discovery board: Workday core reporting and analytics item.
   - Document content: File types Drive supports that don't fall into another category, such as DOCX, JPG, TIF, and PPTX.
   - Document template: Workday Docs template.
   - Folder.
   - Media: Video and packaged content, such as Workday Learning items.
   - Notification template: Notification Designer template.
   - Presentation: Workday Slides presentation.
   - Workbook: Worksheets workbook.

Related Information
Reference
Workday 32 What's New Post: Reporting Data Source for Drive

View Sharing Details for a Drive Item

Prerequisites

Security: *Drive Administrator* domain in the System functional area.

Context

Use this report to view the sharing information for an individual item in Drive.

Steps

1. Access the View Shares for Drive Item report.
2. Select the item owner and the item name.

   Drive displays general information about the item, including when it was created and the item type, as well as this information related to sharing:

   - Is Link Shared (Yes/No)
   - Share Assignments
   - Permission
   - Date Shared
   - Shared By
   - Inherited from Folder (Yes/No)

Related Information
Reference
Workday 32 What's New Post: Reporting Data Source for Drive

Transfer Ownership of Drive Items to a Different User

Prerequisites

Security: *Drive Administrator* domain in the System functional area.

Context

Use this task to transfer up to 1,000 Drive items owned by a user to another user. You can transfer:

- Folders owned by the user. Only the items in the folder that are owned by the user are transferred; non-owned items in the folder keep their existing ownership.
- Individual items owned by the user, where either of these conditions exist:
    - The items are inside folders owned by others.
    - The items aren't in a folder. (They're at the top level of the Drive file hierarchy.)

When an administrator transfers ownership:

- Selecting a folder transfers any subfolders or files that are owned by the specified user.
- Selecting a folder doesn't transfer any subfolders or files that are owned by someone else.
- Transferring an item removes the old owner's access; they aren't downgraded to Edit permission.
- Transferring an item doesn't remove access from people it was shared with; the selected user might retain access to items they don't own. For example, if you transfer a folder and the previous owner had edit permission on an item in the folder, that permission remains intact after the transfer.
- Each transferred item moves to the new folder that you specify at the start of the task.
- For transferred Worksheets workbooks, Worksheets cancels any existing live data update schedules; the new owner must create a new schedule.

Notes:

- Only individual users (not groups) can own items in Drive.
- If a user's role changes, Drive doesn't automatically update item access settings unless the role change also causes a change to the security groups the user belongs to and the user gained access to the item because of a share with the security group. If the item was shared with the individual user, then you need to manually change any necessary access settings.
- When setting up a termination business process, make sure you remove the user's access to the Drive domain, View Drive File and Media domain, and any domains for products that integrate with Drive such as Worksheets, Slides, Notification Designer, and Workday Docs.
- If a worker leaves the company, others who have access to the terminated worker's items retain their access.
- Workday does not support transferring ownership of media instances linked to a Workdrive Document Content instance, which can occur when documents are directly uploaded to a Learning course.

Steps

1. Access the Transfer Ownership of Drive Items task.
2. Select the user to transfer items from.
3. Select the user to transfer the items to, and enter a name for a new folder to contain the transferred files.
4. Select the items to transfer. If you select the All Items check box and the user owns more than 1000 items, Drive selects the first 1000 items.

Result

Drive places all transferred items in the specified folder, in the new owner's Drive main view.

Permanently Delete Drive Items

Prerequisites

Security: *Drive Administrator* domain in the System functional area.

Context

Use this task to permanently delete up to 1,000 Drive items that a specified user owns. Permanently deleting an item removes the item and its metadata from the Workday database.

You can delete most supported Drive item types, such as discovery boards, workbooks, DOCX, XLSX, PDF, as well as empty folders. You can't permanently delete:

- Discovery boards used as worklets on the Home page.
- Media files (video and packaged content).
- Workbooks used in integrating applications such as Payroll, Recruiting, or HCM.
- Items that have a reference from a Knowledge Base Article.
- Folders that have items in them.
- Workbooks used as a template by other workbooks.
- Document templates (used in generate document in business process) that have a reference from a generated document or a review document step.

Steps

1. Access the Drive Permanent File Delete task.
2. Select the user whose files you want to delete, the item types to list, and the item location to display files from and click OK.

   Workday displays a table with 2 tabs: Available for Deletion and Not Available for Deletion.
3. On the Available for Deletion tab, select up to 1,000 items.

   An item is available for deletion when it's not in use by a process external to Drive, such as a business process.

   If you select the All Items check box and the user owns more than 1000 items, Drive selects the first 1000 items.
4. Click OK to complete the deletion.

Concept: About Folders in Drive

It's important to understand the rules associated with file and folder ownership and sharing.

Folder Sharing Access and Permissions

Sharing a folder is an easy way to share a group of items as 1 action. When you share a folder with a user or group, you give them edit, comment, or view access to all the files and subfolders in that folder. You can share a folder if you own the folder or you have edit access to the folder. Folder owners might or might not own the items in the folder.

Keep in mind that if a user has access to a particular *item* in a folder because the *folder* was shared with them, you can't remove the user's access to the individual item; the X selection doesn't display for that user in the Who Has Access tab.

If you leave the company and your Workday status changes to terminated, any items that you owned and shared will remain available to the people you shared them with. Administrators can transfer ownership to another user.

As the owner of a folder, if you give edit permission to another user for that folder, they can add items to the folder; that user owns the created item.

Sharing permissions are either explicit or inherited:

- When you share a folder with a user or group, you're giving explicit access to it.
- When a user or group gains access to an *item* in a shared folder, or to a subfolder in the shared folder, this access is called inherited access.

If you want to give a user different levels of permission at different levels of a folder/file hierarchy, we recommend giving view permission at the higher level of the hierarchy and edit permission for individual files at the lower level. If a user has edit permission at a higher level, they can change their own lower level view permission to an edit permission.

Moving Items Into and Out of Shared Folders

Users can move any items that either they own, or items in a folder that they can edit.

Users can move items to a folder they own or can edit, or to the Drive home view. If a user with shared edit access to a folder moves an item to their own folder, they continue to have access to the item. If a user moves an item to their Drive home but the item isn't owned by them and wasn't explicitly shared with them, they lose access to the item.

Users with access to an item will have the same access permission when the item moves into a shared folder.

When a user moves an item out of a folder, Drive removes any share settings that were previously applied at the folder level.

Removing (Moving to Trash) Drive Items

These rules apply when removing items (placing them in the Trash), including items in shared folders:

- Only an owner can remove a file or folder.
- Removing an item removes all its share permissions.
- Restoring an item doesn't restore its share permissions.
- If a workbook was originally created from an integrating application such as Workday Payroll or Planning, you can remove the workbook only if you disable the entry area first. Some integrating applications refer to disabling the entry area as locking.
- After removing a workbook, you can restore it only if you're the owner.

Drive administrators can permanently delete some types of Drive items by accessing the Drive Permanent File Delete task.

Transferring Ownership of Individual Files or Folders

This section describes transferring ownership of items using the Transfer Ownership drop-down list in the Share dialog. Any Drive user who owns items can do this action.

Make sure that you already shared the file or folder with the person that you want to transfer ownership to. Then select to Share the item, and select Transfer Ownership in the permissions drop-down list for that user.

Only individual users (not groups) can own items in Drive.

When you transfer a folder, only the items in the folder that you own are transferred; non-owned items in the folder keep their existing ownership.

When you transfer ownership of a folder or file:

- Workday preserves the sharing settings and folder hierarchy for the transferred item.
- Your permission level for the item changes to Can Edit.
- The new owner can remove your access.
- If the transferred item is a Worksheets workbook:
    - You won't be able to edit any protected ranges.
    - Worksheets cancels any existing live data update schedules; the new owner must create a new schedule.

Ownership Transfer by an Administrator

When an administrator transfers ownership of items:

- Workday preserves the sharing settings and folder hierarchy for the transferred items.

- For transferred folders, Workday removes the folder hierarchy above the transferred folder (the folder containing the transferred folder), but the hierarchy remains unchanged for items inside the shared folder.
- For transferred folders, items that are owned by others are not transferred (those users retain their ownership).
- The original owner loses all permission for the item.
- For transferred Worksheets workbooks, Worksheets cancels any existing live data update schedules; the new owner must create a new schedule.

Copying Files

When you copy a file in Drive, you can select the destination folder for the copy by searching for it or navigating to it. If you don't select a destination, then the destination is the location of the original file. When you're copying an item from within one of the integrating products, such as copying a workbook from the Worksheets user interface or a presentation from Slides, the default destination might vary from what you see in Drive.

You can't copy folders.

Concept: Managing Files and Folders in Drive

This table summarizes the primary actions that you can do with files and folders in Drive, if:

- You have the appropriate permissions.
- You selected to manage that file type when setting up Drive.
- Drive supports the action for that file type.
- The application (such as Workday Slides or Workday Worksheets) is available on the tenant.

Action	Notes
Upload files Convert files to Worksheets workbooks	Select Add New > Upload, or drag one or more files into the Drive page. Drive automatically converts uploaded spreadsheet-type files to workbooks if all these conditions exist: • Worksheets is enabled in the tenant. • You're in the *Worksheets* security domain. • The file has the type XLS, XLSX, CSV, or HTML. To upload media (video and packaged content) files, you must have already signed the Workday Media Cloud Terms and Conditions order form, and you must be in the *Manage: Media* security domain. Drive automatically scans items for viruses when you upload them. Virus scanning doesn't apply to files added to Drive from integrations, or to media files. The maximum upload file size is 30 MB.
Create a Worksheets workbook	From Drive, select Add New > Workbook to create a new blank workbook. From a Workday report, select Export to Worksheets to export Workday report data to create a new workbook. You can do this action if both of these conditions exist: • Worksheets is enabled in the tenant. • You're in the *Worksheets* security domain.
Create a Workday Slides presentation	You can select Add New > Presentation if both of these conditions exist: • Slides is enabled in the tenant.

Action	Notes
	• You're in the *Slides* security domain.
Create a discovery board	You can select Add New > Discovery Board if this condition exists: • You're in the *Discovery Boards: Create* security domain.
Create a notification template	You can select Add New > Notification Template if both of these conditions exist: • Notification Designer is enabled in the tenant. • You're in the *Notification Designer* security domain.
Create a Workday Docs document template	You can select Add New > Document Template if both of these conditions exist: • Workday Docs is enabled in the tenant. • You're in the *Docs* and *Document Library* security domains.
Download an item	Download options depend on whether download is enabled for that particular item type: • For supported item types, select the item and then click Download. • For item types such as workbooks, Slides presentations, and notification templates, open the item and select File > Download As and select from the available file types. • For item types that don't have a viewer or previewer, when you double-click the item name you can download it.
Filter the display of items	Select one of the views along the left side of the home page to see items in those categories, or click the Filter button at the top right for additional filtering options. Note that the My Files view is merely a filter that shows items you own, in a flat list that doesn't show the folder structure; we don't recommend using this view for managing Drive items.
Share an item using a link (URL)	You can share an item with many users at once by giving them a link, which you generate in the Share dialog. Users can access shared files only if they are in the *Drive* domain or the *View Drive File and Media* domain. Additionally, for each item that you want to share, make sure the recipient is in any other required domains for the item type. Example: If you want to share a Worksheets workbook, the person you're sharing with must be in the *Worksheets* domain. 1. Select a file in Drive, and click Share. 2. Enable the Link Sharing option if it isn't already enabled. The ability to use link sharing is a tenant setting. If you don't see the option, check with your administrator to ensure that it's enabled. 3. Select the permission level. Everyone who accesses the file using the link will have this level of access to the file. 4. Click Copy Link. Give this URL to people you want to share the file with. When using link sharing, consider: • Drive supports link sharing for all Drive file types except discovery boards. You can't share folders using a link. • Sharing an item using a link causes the item to be shared with the All Users security group. Any user with access to the related application can access the item if they have the URL.

Action	Notes
	• Unlike sharing with individual users, when you share a file using a link, Workday doesn't send notifications. You might want to notify people that you shared an item with them; for example, if you shared a Worksheets workbook with a group you can email them a link to it. • In Drive, files that you share using a link display a Link icon next to the Who Has Access avatars. You can open the Share dialog by clicking the icon or an avatar. • If someone shares a file with you by sending you a link, the shared file doesn't display in Drive or in search results. The file displays in Drive, or in search results, only if they shared it with you using the Share With Individuals area in the Share dialog. • If you change the permission level for the item later, the level of access updates immediately. Example: You originally set the Edit permission level and gave the link to Cara, who is now editing the file. If you change the link sharing permission level to View, Cara's permission changes immediately and she can no longer edit the file. • Individual file sharing settings in the Share with Individuals area of the Share dialog remain active if you turn off link sharing. • If you use link sharing for an item, and you also share it with individual users or groups, the person gets the highest of the possible permission levels. Example: You share a file with Bibi individually and give her View access. You also use link sharing and you set the permission level to Edit. Bibi has Edit permission for the file. If you later turn off link sharing, Bibi continues to have the View permission that you specified for her individually. • You can't use link sharing to share files with implementer users.
Share an item with security groups	You can share an item with groups of users by typing the security group names in the Share dialog. You enable group sharing for each Drive item type in the Configure Group Sharing in Drive task. Users can access shared files only if they are in the *Drive* domain or the *View Drive File and Media* domain. Additionally, for each item that you want to share, make sure the recipient is in any other required domains for the item type. Example: If you want to share a Worksheets workbook, the person you're sharing with must be in the *Worksheets* domain. 1. Select an item in Drive, and click Share. 2. In the Share with Groups area, select a permission level for the item in the Permissions drop-down menu. 3. In the Share with Groups area, type the names of the groups that you want to share the item with. 4. (Optional) If you're the item owner, you can click Advanced to select whether or not to let editors share the file, and whether to let commenters and viewers copy or print/download the item. For media (video) files, you can enable or disable the ability for owners to allow copy or download, using the appropriate setting in the *Edit Tenant Setup - System* task. These special considerations apply for folder sharing: • All users you give folder edit access to can add, remove, and change permission for contributors. • All users you share the folder with can download, copy, and print files in the folder.

Action	Notes
	When sharing with security groups, consider: - Drive supports sharing with security groups for all Drive item types, including folders. - Unlike sharing with individual users, when you share an item with a group, Workday doesn't send notifications. You might want to notify people that you shared an item with them; for example, if you shared a Worksheets workbook with a group you can email them a link to it. - You can view and manage which groups have access (and the level of access) to a group-shared file in the Who Has Access tab of the Share dialog. - If you gain or lose membership in a group, you automatically gain or lose access to items that someone shared with that group. These will display in your Drive. - If you use link sharing for an item, and you also share an item with a group, the group member gets the highest of the possible permission levels. Example: You share a file with the Managers group, which Bibi is a member of, and give the group View access; you also use link sharing and you set the permission level to Edit. Bibi has Edit permission for the file. If you later turn off link sharing, Bibi continues to have the View permission that you specified for the Managers group. - In general, groups that you share files with can see any data in the files, except: - For discovery boards, row level security applies and groups see only the data they have access to. - For workbooks, you can hide content, but if you allow users to copy the workbook, they can unhide the content after copying the workbook.
Share an item with individual users	You can share items in Drive with individual users. Sharing with individual users enables you to set a specific permission level for the person. Users can access shared files only if they are in the *Drive* domain or the *View Drive File and Media* domain. Additionally, for each item that you want to share, make sure the recipient is in any other required domains for the item type. Example: If you want to share a Worksheets workbook, the person you're sharing with must be in the *Worksheets* domain. - Select a file in Drive, and click Share. - In the Share with Individuals area, select a permission level for the item in the Permissions drop-down. - In the Share with Individuals area, enter the names of the users that you want to share the item with. (Optional) Type a message for the users you're sharing with. The message displays in the Workday notification that the users receive after you click OK. (Optional) If you're the item owner, you can click Advanced to assign more specific sharing settings for editors, commenters, and viewers. The following options aren't applicable to folders: - All users you give folder edit access to can add, remove, and change permission for contributors. - All users you share the folder with can download, copy, and print files in the folder.

Action	Notes

	When sharing with individual users, consider:
	• Drive supports sharing files with individual users for all Drive file types. You can also share folders with individual users.
	• If you use link sharing for an item, and you also share an item with individual users or groups, the person gets the highest of the possible permission levels. Example: You share a file with Bibi individually and give her View access; you also use link sharing and you set the permission level to Edit. Bibi has Edit permission for the file. If you later turn off link sharing, Bibi continues to have the View permission that you specified for her individually.
	• If you change the permission level for the item later, the level of access updates immediately. Example: You originally gave Can Edit permission to Cara, who is now editing the file. If you change the permission level to View, Cara's permission changes immediately and she can no longer edit the file.
	• When you share an item, the user receives a Workday notification and an email (if you enabled email notifications).
	• In general, users that you share files with can see any data in the files, except:
	    • For discovery boards, security applies and users see only the data that they have access to.
	    • For workbooks, you can hide content, but if you let users copy the workbook, they can unhide the content after copying the workbook.

Edit a file	Double-click a filename to open and edit it. For videos: 1. Double-click the file to open the View Media page. 2. Click Edit Media. The Edit Media button displays for videos (but not packaged content) if these conditions exist: • You're in the *Manage: Media* security domain. • You're the owner of the video or the owner gave you edit permission.
Move an item	Right-click the item name and select Move; then navigate to the location where you want to put the file.
Copy an item	When you copy a file in the Drive user interface, the default destination is the location of the original file. You can navigate to a different location from the Copy dialog. When you're copying an item from within one of the integrating applications, such as copying a workbook from the Worksheets user interface or a presentation from Slides, the default destination might vary from what you see in Drive.
Rename an item	Right-click the item name and select Rename. For video files: 1. Double-click the file to open the View Media page. 2. Click Edit Media. 3. Click the pencil (Rename) icon to rename the file.

Action	Notes
	The Edit Media button displays for videos (but not packaged content) if these conditions exist: • You're in the *Manage: Media* security domain. • You're the owner of the video or the owner gave you edit permission. Renaming an item in Drive updates the file name: • In Drive. • When someone opens the item using a shared link or directly in Drive. In a Help article, if you attached a Drive file or added a link from a Drive file and then rename the file, the file continues to open correctly after being renamed. We recommend that you update the value in the Text field to match the renamed file. Example: 1. In an article, use Insert Link to link to a file in Drive, or use Insert Media or File > Select from Drive to attach the Drive file 2022 Results to an article. In the Text field, type `2022 Results`. 2. Rename the file in Drive to 2023 Results. 3. Navigate to the article in the Help Article Workspace, select to Edit the article, and update the value in the Text field to `2023 Results`.
Replace an item	Select the item and click Replace; then navigate to the replacement file. The replace action preserves sharing permissions and the link to the file. When a user selects a link that previously opened the original file, it opens the replacement file instead. Drive currently doesn't support these files for replacement: • Discovery boards • Document templates • Media files (ZIP, SCORM, and video/audio files) • Notification templates • Slides presentations • Worksheets workbooks and templates As you use the new feature, consider: • Drive doesn't save the original, replaced file after it's replaced. • For file types that Drive automatically converts to Workday files, such as converting XLSX or CSV files to Worksheets workbooks, the conversion does not occur for the new replaced files. • The replacement file type must be the same as the original file type. • You can rename a file during the replace action. • You can't undo the replace action. • In a Help article, if you used Insert Media or File > Select from Drive to attach a Drive file to the article, Drive doesn't replace the attached file with the new file. An attached file is a *copy* of the original Drive file. You need to edit the article and insert the replaced file into the article instead of the original. • In a Help article, if you used Insert Link to add a link to a Drive file, the file continues to open correctly after being replaced. If you changed the name of the file when replacing it, we recommend that you update the value in the Text field to correspond to the replaced file's name.

Action	Notes
Remove to the Trash folder and recover from the trash	From the Drive Home page, right-click the file or folder and select Remove to move it to the Trash folder. After you move an item to the trash, no other users can access it even if you previously shared it with them. To restore an item, from the Drive Home page select the Trash icon. Select the row containing the item and then click the Restore icon. Workday places restored items in the Drive Home view. If you remove an item that someone shared with you, you remove yourself from the list of shared users. The item disappears from your file view and it doesn't display in the Trash.
Permanently delete items	You can permanently delete up to 1,000 Drive items that a specified user owns. Access the Drive Permanent File Delete task.

Transfer ownership of individual files or folders	Make sure that you already shared the item with the person you want to transfer ownership to. Then select to Share the item, and select Transfer Ownership in the permissions drop-down list for that user.
	
	When you transfer ownership:
	• Your permission level changes to Can Edit.
	• The new owner has the ability to remove your access.
	• If the transferred item is a Worksheets workbook:
	    • You won't be able to edit any protected ranges.
	    • Worksheets cancels any existing live data update schedules; the new owner must create a new schedule.
	
	Some products that integrate with Drive don't allow ownership transfers.
	
	Only individual users (not groups) can own items in Drive.

Transfer ownership of up to 1,000 files and folders from 1 user to another	Access the Transfer Ownership of Drive Items task.
Customize the navigation pane	Click the Settings icon to: • Assign a default (home page) view for Drive by dragging the item to the top of the list. The new default view displays when you sign in to Workday and navigate to Drive. If you open an item and then return to Drive, Drive shows the last used view. • Reorder the standard filters in the navigation pane by dragging them to the desired position, or hide items by dragging them into the Hidden Menu Items list. • Add one or more folders to the navigation pane for quick access, by clicking the Add Folder link. You can add up to 10 folders in the visible list of filters, and up to 100 folders total, including items in the Hidden Menu Items list.
Navigate to a user profile from a Drive item	Click the link on the: • Info dialog Owner, Created By, and Last Modified fields. • Share dialog Who Has Access field. The user information displays as regular text when the applicable user is the same as the user viewing the item.

Action	Notes
Collapse or expand the right pane	Click the arrow icon on the right pane divider.

Related Information

Reference

Reference: Mobile Features and Usability Notes for Drive on page 441

Workday 31 What's New Post: Link Sharing in Drive

Concept: Proxy in Drive

Drive supports proxy access in nonproduction environments for several item types. Using proxy access helps you understand the configurations in your tenant, without affecting production data. Using proxy access also eliminates the need to share passwords, helps you comply with security best practices, and assists in troubleshooting problems.

Users can use the Start Proxy and Stop Proxy tasks in Workday to use proxy when it's enabled for them.

Keep in mind that in an application workflow such as HCM, where the application creates a file (not Drive), proxy usage might not be supported.

Drive blocks the usage of:

- Delegation and Constrained Proxy.
- Proxying to manage Slides presentations or media (Learning/SCORM) files.

When using proxy, Drive supports the management of folders and these item types:

- Discovery boards
- Notification Designer templates
- Workday Docs templates
- Worksheets workbooks
- BMP
- CSV
- DOC
- DOCX
- GIF
- HTM
- HTML
- JPEG
- JPG
- JWF
- PDF
- PNG
- PPT
- PPTX
- SVG
- TIF
- TIFF
- TSV
- XLS
- XLSM
- XLSX
- XLTM
- XLTX

Related Information

Tasks

Manage Proxy Access

Reference: Comparison of File Sharing and Folder Sharing Options

When you share a folder, the sharing options available to you are different from file sharing options. This table explains the key differences:

File Sharing	Folder Sharing	Notes
Sharing option: Commenters and viewers can download, copy, and print	All users you share the folder with can download, copy, and print files in the folder.	To remove these abilities, open the individual file and change the setting.
Sharing option: Editors can share	All users you give edit access to can add, remove, and change permission for contributors. If you originally create a file in an unshared folder and later you move it to a shared folder, the Editors Can Share option becomes enabled.	In a shared folder, you can't disable the Editors Can Share setting.
Link sharing	Not available for folders.	Link sharing is also not available for discovery boards.

Reference: Drive Admin Hub and Usage Summary

Drive Admin Hub

The Drive Admin Hub displays reports and tasks that are secured to the *Reports: Drive Admin* domain and the *Drive Administrator* domain.

Tasks:

- Configure Group Sharing in Drive
- Drive Permanent File Delete
- Remove Drive Shares
- Remove Share Recipient from Drive
- Transfer Ownership of Drive Items

Reports:

- Drive Item History
- Drive Usage Summary
- View Drive Items for User
- View Shares for Drive Item
- View Workbook Details

The Drive Items Permission Audit report is available using search but it isn't in the Admin Hub.

Drive Item History

You can find the Drive Item History report using global search or in the Drive Admin Hub.

This table describes the prompts for the report.

Prompt	Notes
Metric Type	Optional. Select the metric type you want to include.

Prompt	Notes
	• Download • Open. This metric includes open actions that occur when using Drive, not from other methods. • Replace • Update
User	Optional. Select one or more users.
Drive Item	Optional. Select one or more items.
Folders	Optional. Select one or more folders.
Drive Item Type	Optional. Select one or more item types.
Related Content	Optional. Select one or more Workday reports to see which workbooks use data from those reports. To limit search results to only reports, type the prefix rd: before your search text. Note: Drive has access to related content only for workbooks that a user created or opened after the addition of the related content feature. If you are not seeing related content for a workbook that you know uses report data, make sure the workbook was created or opened by someone after December 2, 2022.

Drive Usage Summary

This table describes the information displayed in the Drive Usage Summary report.

Section	Information
Chart: Share Count by Permission Level	• Share Count • Permission Level • Number of Shares
Chart: Item Count by Type	• Item Count • Item Type
Chart: Users Per Domain	• User Count • Domain
Files with Most Shares	• Share Count • Name • Item Type • Parent Folder • Trashed • Owner • Created On • Last Updated • Content Last Updated • Workday ID • Instance ID
Folders with Most Shares	• Share Count • Item Count • Name • Parent Folder • Trashed

Section	Information
	• Owner • Created On • Last Updated • Content Last Updated • Workday ID • Instance ID
Folders with Most Items	• Item Count • Share Count • Name • Parent Folder • Trashed • Owner • Created On • Last Updated • Content Last Updated • Workday ID • Instance ID

View Workbook Details

This standard report is secured to the Reports: Drive Admin domain, and uses the Workbook Metrics – Admin report data source (RDS). Drive administrators with View or higher permissions for the Worksheets domain can use this report to view metrics for one or more workbooks, where the data was modified after the report's release date of July 1, 2023. You can find the View Workbook Details report using global search or in the Drive Admin Hub.

All report prompts are optional. They are:

- Creation Date From/To
- Workbook Name
- Owned By

This table summarizes the information in the report:

Column	Notes
Name	The workbook name.
Workday ID	The Workday unique identifier (WID) of the workbook.
Owner	The workbook owner.
Time of Last Update	The date and time when the workbook was last modified; this indicates when Worksheets obtained metrics from the workbook.
Cell Count	The number of active cells in the workbook. Worksheets counts cells as active if they either currently have a value or previously had a value. (They might currently be blank.)
Sheet Count	The number of sheets (tabs) in the workbook.
External References (Producer Workbooks)	A list of workbooks that provide data to the workbook using one or more external references.

Column	Notes
Live Data Reports	Workday reports used in the workbook.
Scheduled Refresh Frequency	This field is cleared if someone deletes the schedule or the schedule expires.
Next Scheduled Refresh Date	This field is cleared if someone deletes the schedule or the schedule expires.
Scheduled Refresh Expiration Date	This field is cleared if someone deletes the schedule or the schedule expires.

Reference: File Actions in Drive Based on Permissions

This table summarizes the primary actions that you can do with files in Drive on a web browser, based on the user's permission level. You specify permission levels when you share a file.

Action	Can View	Can Comment	Can Edit	Owner	Notes
View file	X	X	X	X	
View file information	X	X	X	X	
Search for a file or folder	X	X	X	X	Start typing the word or phrase that you want to find. You need to type at least 2 characters. Drive searches all folders that you have access to. Files that someone shared with you using a link don't display in search results.
Copy file	X	X	X	X	If the file is in a shared folder, the copy displays in the same location as the original. If you're copying an individual file that's not in a shared folder, the copy displays in your Drive home view. Applies for the Can View and Can Comment permission only if the file owner enabled the Copy option for that user. Not applicable to discovery boards.
Download file, when you enable the file type in tenant settings	X	X	X	X	Applies for the Can View and Can Comment permission only if the file owner enabled the Download option for that user.

Action	Can View	Can Comment	Can Edit	Owner	Notes
					Not applicable to discovery boards.
Print Worksheets workbooks, if enabled in tenant settings	X	X	X	X	Applies for the Can View and Can Comment permission only if the file owner enabled the Download/Print option for that user.
View and add comments in Worksheets workbook		X	X	X	
View list of users that you shared a file with		X	X	X	If a user's avatar changes in Workday, a delay of up to 8 hours might occur before you see the update in Drive.
Remove yourself from shared file access	X	X	X		
Add file to folder			X	X	Applies if you have Edit permission for the folder.
Share file with specific individuals or groups, or using a link			X	X	Applies for the Can Edit permission only if the file owner enabled the sharing option when sharing the file.
Change share permissions			X	X	Applies for the Can Edit permission only if the file owner enabled the sharing option when sharing the file.
Edit file content			X	X	
Rename file			X	X	Applies to media files when you are in the *Manage: Media* security domain and have edit permission.
Move file			X	X	
Transfer ownership of individual items				X	You must share the item first, before you can transfer ownership to that person. Some products that integrate with Drive don't allow ownership transfers.
Change owner settings for sharing and copying				X	
Move to trash and restore from trash				X	

Reference: File Actions in Drive Based on File Type

In general, Drive supports these file types:

- BMP
- CSV
- DOC
- DOCX
- DWXF (Workday Docs templates)
- GIF
- HTM
- HTML
- JPEG
- JPG
- JWF
- LPXF (Slides presentations)
- NDXF (Notification Designer templates)
- PDF
- PNG
- PPT
- PPTX
- SVG
- TIF
- TIFF
- TSV
- WXF (Worksheets workbook files)
- XLS
- XLSM
- XLSX
- XLTM
- XLTX

This list of file types doesn't apply to discovery boards, or to media files (videos and packaged content). Discovery boards are supported automatically. Workday enables or disables media file usage based on the status of the Workday Media Cloud Terms and Conditions order form.

This table summarizes the primary actions that you can do with files in Drive on a web browser, based on the file type.

Notes:

- The actions available to you vary depending on your permission level for the file type, whether the action is enabled, and whether the associated application is available on the tenant.
- Viewing and editing options might be limited if you're using the Workday mobile app.
- Actions available for users with Comment or View access depend on how the owner set the Advanced sharing options for the item.

File Type	Actions	Notes
Worksheets workbooks	• Create • Copy • Download • Edit • Remove (to Trash) • Rename • Share	See the workbook actions described in Concept: Managing Files and Folders in Drive on page 422.

File Type	Actions	Notes
	• View	
Slides presentations	• Create • Copy • Download • Edit • Remove (to Trash) • Rename • Share • View	See the presentation actions described in Concept: Managing Files and Folders in Drive on page 422.
Discovery boards	• Create • Copy • Edit • Remove (to Trash) • Rename • Share • View	See Steps: Create a Discovery Board. To share with View permission, the recipient must have access to all the data sources and data source filters used within the board. To share with Edit permission, the recipient must have Modify access to the *Discovery Boards: Create* domain.
Notification templates	• Create • Copy • Edit • Remove (to Trash) • Rename • Share • View	See Create and Activate Notification Templates on page 284.
Workday Docs templates	• Create • Copy • Edit • Remove (to Trash) • Rename • Share • View	See Create and Publish Docs Templates on page 386.
Video/media files	• Copy • Download • Edit • Remove (to Trash) • Rename • Share • Upload • View	To rename a media file: 1. Double-click the file to open the View Media page. 2. Click Edit Media. 3. Click the pencil (Rename) icon to rename the file. Media (video and packaged content) files have an option in the Drive section of the Edit Tenant Setup - System task that determines whether file

File Type	Actions	Notes
		owners can allow viewers and commenters to copy or download. When you copy a media file containing closed captions, Drive copies only the video portion of the media. You need to copy the closed captions separately.
PDF files	• Copy • Download • Move • Remove (to Trash) • Rename • Replace • Share • Upload • View	
Microsoft file types: DOC and DOCX	• Copy • Download • Remove (to Trash) • Rename • Replace • Share • Upload • View	Drive doesn't support previewing password-protected files.
Microsoft® file types: XLS and XLSX	• Copy • Download • Move • Remove (to Trash) • Rename • Replace • Share • Upload	When you upload this type of file, Drive uploads the original file and automatically creates a workbook from the file. To view the original file, you must download it; Drive doesn't include a file viewer. Drive doesn't support converting an Excel file to a workbook if it requires a password to open.
Microsoft file types: XLSM	• Copy • Download • Remove (to Trash) • Rename • Replace • Share • Upload	To view these files, you must download them; Drive doesn't include a file viewer.
Microsoft file types: PPT and PPTX	• Copy	To view these files, you must download them; Drive doesn't include a file viewer.

File Type	Actions	Notes
	• Download • Remove (to Trash) • Rename • Replace • Share • Upload	
Delimited file type: CSV	• Copy • Download • Remove (to Trash) • Rename • Replace • Share • Upload	When you upload these files, Drive uploads the original file and automatically creates a workbook from the file. To view the original file, you must download it; Drive doesn't include a file viewer.
HTML file type: HTML	• Copy • Download • Move • Remove (to Trash) • Rename • Replace • Share • Upload	When you upload these files, Drive uploads the original file and automatically creates a workbook from the tables in the file. If the file doesn't contain tables, Drive doesn't create a workbook. To view the original file, you must download it; Drive doesn't include a file viewer.
Image file types: GIF, JPG, JPEG, PNG	• Copy • Download • Move • Remove (to Trash) • Rename • Replace • Share • Upload • View	
Image file types: BMP, SVG, TIF, and TIFF	• Copy • Download • Move • Remove (to Trash) • Rename • Replace • Share • Upload	To view these files, you must download them; Drive doesn't include a file viewer.

File Type	Actions	Notes
ZIP files (SCORM/AICC files only)	• Copy • Download • Move • Remove (to Trash) • Rename • Share • Upload	You can upload SCORM or AICC packaged content in ZIP files. (Workday Learning uses these files.) If the ZIP file isn't a Learning package (a valid SCORM or AICC package), the upload fails. You can upload ZIP files only if Workday Media Cloud is enabled in the tenant. Media (video and packaged content) files have an option in the Drive section of the Edit Tenant Setup - System task that determines whether file owners can allow viewers and commenters to copy or download.

Reference: Folder Actions in Drive Based on Permissions

This table summarizes the actions available for folders based on the user permission level.

You specify permission levels when you share a folder.

Action	Can View	Can Comment	Can Edit	Owner	Notes
View folder content	X	X	X	X	
View folder information	X	X	X	X	
Comment on workbooks in a shared folder		X	X	X	To change a user's permission setting for a file, update the setting in the individual file.
Copy shared file in shared folder	X	X	X	X	If the file is in a shared folder, by default the copy displays in the same location in the folder hierarchy as the file you're copying. If you're sharing an individual file that's not in a shared folder, by default the copy displays in your Drive Home view.
View list of users that you shared the folder with	X	X	X	X	
Remove (self) from shared folder access	X	X	X		You can remove your access only at the level where someone gave it to you - the root access - not at an inherited access level.
Create subfolder in a shared folder			X	X	
Create or upload files in a shared folder			X	X	Shares all added items with all users who have view or edit permission for the folder.
Share folder with specific individuals			X	X	Link sharing isn't available for folders.

Action	Can View	Can Comment	Can Edit	Owner	Notes
Share folder with groups (if enabled by administrator)					
Unshare with contributors			X	X	If the file that you unshare is in a folder, after you unshare the file it regains any access permissions that it inherits from the folder.
Change a contributor's permission setting			X	X	
Share subfolder in a shared folder			X	X	
Reshare folder			X	X	
Give folder access to users or groups			X	X	
Change permission level of contributors			X	X	
Unshare with a user or group			X	X	Removes all access and permission.
Rename folder			X	X	
Move file or folder to a different folder			X	X	The ability to do this action depends on: • The user's permission at the original location. • The user's permission at the destination. • The location in the hierarchy of the item you're moving. The item inherits the destination folder permissions by appending them to the existing permissions.
Rename folder			X	X	
Transfer ownership of individual folder				X	Share the folder first, then you can transfer ownership to that person. Some products that integrate with Drive don't allow ownership transfers.
Transfer ownership of up to 1,000 items, which can be contained in folders					Administrator only

Action	Can View	Can Comment	Can Edit	Owner	Notes
Change owner setting for advanced sharing options				X	
Change owner setting for editor sharing				X	Owners can change this setting for shared files that aren't in shared folders.
Remove folder to the trash				X	Removing a folder removes any sharing permissions.
Restore folder or file from the trash				X	Restoring a folder doesn't restore sharing settings.
Upload folders (not supported)					Drive doesn't support uploading folders or folder hierarchies, such as from Cyberduck.

Reference: Mobile Features and Usability Notes for Drive

You can access Drive from the Drive worklet on the Workday mobile app.

This table summarizes differences in functionality between the Drive web application and the mobile applications.

Action	Notes
View files	iOS: • You can view these file types in the Drive app: PDF, DOC, DOCX, JPEG, JPEG2000, TIFF, PICT, GIF, PNG, BMP, ICO, QuickTime®, Apple® ICNS, video files, and packaged content. • You need a third-party app to view these file types: XLS and XLSX. Android: • You can view these file types in the Drive app: PDF, JPG, JPEG, PNG, GIF, TIFF, BMP, and video files. • You need a third-party app to view these file types: DOC, DOCX, XLS, and XLSX.
Convert to workbook	From the Actions menu to the right of the filename, go to the Action sheet to convert a file to a workbook.

Reference: Security Domains and Drive Item Management

This table describes the security domains that control access to the item types that Drive manages.

Domain	Notes
Drive	Enables administrators and self-service users to: • Access the Drive main menu option on a web browser and the Drive worklet on mobile. • Share files with other users in the *Drive* or *View Drive File and Media* domain. (Additionally, for each item that you want to share, make sure the recipient is in any other required domains for the item type. Example: If you want to share a Worksheets workbook, the person you're sharing with must be in the *Worksheets* domain.)

<table>
<tr><th>Domain</th><th>Notes</th></tr>
<tr><td></td><td>Upload and manage files such as XLSX, DOCX, PDF, and PPTX, if you selected to support them in your tenant.
Upload and manage Worksheets workbook files if the user is in the Worksheets domain.
Create and manage folders.
Upload media (video and packaged content) files if Workday detects that a signed Workday Media Cloud Terms and Conditions order form exists.
View media (video and packaged content) files.</td></tr>
<tr><td>Drive Administrator</td><td>Enables administrators to access the:
Configure Group Sharing in Drive task: For each item type that Drive supports, select whether to let self-service users share that item type with specific unconstrained security groups. Optionally, select to allow only Drive administrators to share items with security groups.
Drive Permanent File Delete task: Permanently delete certain types of Drive items.
Remove Drive Shares task: Remove all users' shared access permissions for a particular item.
Remove Share Recipient from Drive task: Remove a particular user's shared access to up to 1,000 items.
Transfer Ownership of Drive Items task: Transfer up to 1,000 Drive items owned by 1 user to a different user.
Drive Admin Hub report: Access reports that are secured to the Reports: Drive Admin domain and tasks that are secured to the Drive Administrator domain.
Drive Usage Summary report: View an overview of Drive usage in the tenant.
View Drive Items for User report: View the Drive items that a user owns or has access to.
View Shares for Drive Item report: View the sharing details for an individual Drive item.</td></tr>
<tr><td>Drive Web Services</td><td>Enables developers to use the Public Drive Web Services:
Get Drive Document Content
Get Tenant Setup Group Share Configurations
Put Drive Document Content
Put Tenant Setup Group Share Configurations
Owner permission is required.

The web services are available for file types such as PDF, DOCX, PPT, JPG, and more. We currently don't support folders, or items in product-specific areas such as:
Discovery boards
Folders
Media files (including ZIP files)
Notification templates
Worksheets workbooks
Drive doesn't automatically convert files that you upload using a web service. Example: When you upload a CSV file from the Drive user interface, Drive automatically converts the CSV file to a Worksheets workbook. This conversion</td></tr>
</table>

Domain	Notes
	doesn't occur when you upload a file using the Put Drive Document Content web service.
Reports: Drive Admin	Enables administrators to view report fields related to Drive, for all Drive items in the tenant, and for all Workday accounts enabled for Drive. When you have access to this domain, you can see these reports: • Drive Item History (Standard) • Drive Items Permission Audit (Standard)
Reports: Drive User	Enables users to view report fields related to Drive, for only the Drive items in the tenant that the user owns or that were shared with the user. Users can see these items in the Drive file viewer, but they need access to the Reports: Drive User domain in order to see the items in a report.
View Drive File and Media	Enables users to view files or media items that other users share from Drive, without requiring that the user have access to the *Drive* domain. Examples: • You don't want to give Drive access to pre-hires but you want to share an onboarding video with them. You can add the pre-hires to the View Drive File and Media domain, and then share the URL for the video. • If you shared a DOCX file using a link and you gave View permission to everyone, users with the link can view the file even if they don't have access to Drive. This domain doesn't provide view access to files that are managed using another security domain. Example: Users with access to the *View Drive File and Media* domain can't view Learning course files or Worksheets workbooks.
Drive: Viewers Drive: Owner Drive: Seer	These are special domains that Drive manages automatically depending on the user's access to individual Drive items. These domains aren't viewable using the View Domain report and they're not configurable.
Slides	Applicable for adding and managing presentations using Slides.
Worksheets	Applicable to Workday Worksheets and products that integrate with it, such as Planning, Payroll, and Projects for Resource Forecasting.
Notification Designer	Applicable for adding and managing notification templates using Notification Designer.
Manage: Media	Applicable to Workday Media Cloud.
Discovery Boards: Create	Applicable for adding and editing discovery boards.

FAQ: Drive Item Storage and Integrations

Where are Drive items stored?	Drive stores items in different locations depending on the item type. This table shows the supported item types and their storage locations.

Item Type	Storage Location	Notes
Drive folders	Tenant data center	
Files	Tenant data center	The File item type is associated with supported types that don't fall into a more specialized category: BMP, CSV, DOC, DOCX, GIF, HTM, HTML, JPEG, JPG, PDF, PNG, PPT, PPTX, SVG, TIF, TIFF, XLS, XLSM, and XLSX.
Discovery boards	Tenant data center	Workday stores discovery board data in the OMS database. Workday stores keys that refer to the data in a separate proprietary data store.
Notification templates	Tenant data center	Proprietary database in the tenant data center. Note: Notification Designer uses a third-party Content Delivery Network (CDN) to deliver the images in emails that Workday sends to users.
Worksheets workbooks	Tenant data center	Proprietary database in the tenant data center.
Slides presentations	Tenant data center	Proprietary database in the tenant data center.
Workday Media Files (video, audio, live stream, and packaged (ZIPped) e-learning	Cloud data center provider (service agreement required)	You can select to upload Learning-related files in 3 ways. When you do the upload, the files become available using Drive but Workday stores the files with the cloud data center provider.

Item Type	Storage Location	Notes
content (such as SCORM, AICC, or other formats))		• While creating a course/lesson by navigating to a location on your computer. • As a standalone action into Drive; then you navigate to them when setting up a course/lesson. • Using a web service. For more information about Workday Media Cloud files, see Workday Media Cloud - FAQ on Community.

Are my Drive uploads scanned for viruses?

Yes, except for media files.

What's the storage limit for Drive files?

Drive doesn't limit the number of files that you can upload. File size limits depend on the type of file you are uploading. Videos are limited to 20 GB, and SCORM, AICC, and zip files are limited to 4 GB. Other files like PDFs or XLSX are limited to 30 MB per individual file. There are currently no limits on the total Drive storage capacity in your tenant. However, we do not recommend using Drive as a file repository for all of your organization's files. Instead, Drive is best used for content and files specific to your workflows in Workday. Workday will work directly with customers in cases where abnormal or excessively heavy usage patterns affect the performance of normal business operations.

How do I maximize performance in Drive?

- We recommend setting up a folder of frequently used files to use as your default view, instead of the Drive view. Example: Create a folder named `Important Items` and move frequently used items into it. Click the Settings icon. Select +Add Folder, and add the `Important Items` folder to the left navigation menu. Then drag the folder to the top position; it becomes your Home Page in Drive. Click Save.
- Use Folders at “My Drive” level to store items, minimizing the number of individual files stored in the main Drive view. When there are thousands of individual files in the Drive view, performance starts to degrade.

	• Use group shares instead of sharing to a large number of individual users.
Is it possible for users to upload copyrighted or sensitive material into Drive?	Each customer is fully responsible for all content housed in Drive, including files that were originally created outside a Workday environment and then uploaded to Drive. We recommend working with your IT and Legal teams to define and publish an acceptable use and data content policy.
Is there a configurable business process associated with the ability to submit files to Drive?	No, any user with access on the Drive domain can upload files with supported file types directly to Drive.
Does Workday have access to files stored in Drive?	No. Drive files are secure for each customer and Workday doesn't have access to them. The only exception would be if the customer explicitly granted temporary visibility as part of a technical support request or similar situation.
Are files in Drive backed up?	Workday has a defined storage plan for each file type. All files except media files are stored on a server in a Workday data center. Media files are stored in a third-party cloud-based storage center (typically Amazon Web Services, although other providers are available) managed by a third-party agreement.
Can I delete Drive files?	Content owners can remove files, which places them in the Trash. This severs any file sharing relationships associated with the files. The files remain in the user's Trash and you can restore them later. Drive administrators can permanently delete most file types using the Drive Permanent File Delete task. File types excluded from the task include: • Discovery boards used as worklets on the Home page. • Media files (video and packaged content). • Workbooks used in integrating applications such as Payroll, Recruiting, or HCM. • Items that have a reference from a Knowledge Base Article. • Folders that have items in them. • Workbooks used as a template by other workbooks. • Document templates (used in generate document in business process) that have a reference from a generated document or a review document step.
Are there any public web services for Drive?	Yes, Drive provides public web services, secured to the Drive Web Services domain. Owner permission is required. The web services are available for

file types such as PDF, DOCX, PPT, JPG, and more. We currently don't support folders, or items in product-specific areas such as:

- Discovery boards
- Docs templates
- Media files (including ZIP files)
- Notification templates
- Slides presentations
- Worksheets workbooks

Considerations:

- Files that you upload to Drive using a web service display in the main Drive view.
- Drive doesn't automatically convert files that you upload using a web service. Example: When you upload a CSV file from the Drive user interface, Drive automatically converts the CSV file to a Worksheets workbook. This conversion doesn't occur with the web services.

Web Services	Description
Get Drive Document Content	View Drive document content
Get Tenant Setup Group Share Configurations	View group share configurations in the tenant
Put Drive Document Content	Create or update Drive document content
Put Tenant Setup Group Share Configurations	Create or update group share configurations in the tenant

Workday Media Cloud

Setup Considerations: Workday Media Cloud

You can use this topic to help make decisions when planning your configuration and use of Workday Media Cloud. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Media Cloud is an optional service that enables you to upload, store, and consume media content. You can publish video and packaged content files in various product areas in Workday.

Business Benefits

You can embed video content into various areas of Workday, enabling you to:

- Showcase your company culture on external career sites to attract talent.
- Streamline your onboarding and training processes by replacing live instructors with prerecorded media, saving time and resources.
- Reduce Support tickets by supplementing knowledge articles and dashboards with media content, making information more accessible and accommodating different learning styles.

Use Cases

- Add captions and interactions, such as multiple choice questions, to videos.
- Embed videos and packaged content into Workday Learning lessons and courses.
- Upload files to Drive to publish video content throughout your tenant. Examples:
  - Campaigns: Deliver videos in scheduled campaigns.
  - Dashboards: Include video announcements to Workday dashboards and landing pages.
  - Journeys: Include videos in journey steps to encourage worker engagement. Example: In the first step of an onboarding journey, add a video that welcomes new hires.
  - Knowledge articles. Walk your workers through complex processes by adding videos to articles. Example: Add a video to an expense report article to demonstrate how to submit expenses step by step.

Questions to Consider

Questions	Considerations
What file types and sizes does Workday Media Cloud support?	Media Cloud supports individual file uploads of up to 20 GB, or 4 GB for SCORM and AICC files. When you enable Media Cloud, Workday enables all supported media file formats for Drive. For a list of supported media file types, see FAQ: Uploading and Viewing Videos on page 455. Media Cloud scans for viruses when you upload media files up to 2GB. You can select the Increase Maximum Upload Size check box on the Edit Tenant Setup – System task to enable larger uploads, but Workday doesn't scan for viruses when uploads exceed 2GB.
How do I optimize videos for Workday?	Workday recommends uploading smaller videos with lower resolutions to provide the smoothest video streaming. Viewers can optimize video playback by: • Closing other applications to free up network bandwidth. • Manually selecting a lower playback quality, especially when watching videos on mobile.

Recommendations

- Review the Workday Acceptable Use Policy to ensure that your media content complies with Workday standards and regulations.

- Review Concept: Best Practices for Creating Videos on page 452 to ensure your videos use Workday-recommended ratios, resolutions, and file formats.
- To enable viewers to select a preferred language and make video content more accessible, upload transcription text files with defined languages for each video.

Requirements

Before you can use Workday Media Cloud:

- Enable the required upload and playback domains for your data center.
- Complete the Workday Readiness Check.
- Set up Drive.

You might need to take additional steps to set up Media Cloud based on your organization's service agreement. See Getting Started with Workday Media Cloud.

Limitations

Skip restrictions and video interactions are only available in Workday Learning.

Tenant Setup

Configure tenant-wide options for Workday Media Cloud in the Media Settings section of the Edit Tenant Setup - System task.

Security

Domain	Considerations
Drive domain in the System functional area	Enables you to upload, edit, and share media files in Drive.
Manage: Media domain in the Backpack Hub Service functional area	Enables you to edit and publish videos in Drive. Examples: manage video interactions, captions, and transcriptions.
Manage: Media Import domain in the Backpack Hub Service functional area	Enables you to import and manage large volumes of media files.
Manage: Media Settings domain the Backpack Hub Service functional area	Enables you to manage tenant-wide options for Workday Media Cloud.
View Drive File and Media domain in the System functional area	Enables users without access to the *Drive* domain to view media files that other users share from Drive. Example: You can share an onboarding video with pre-hires by adding them to the *View Drive File and Media* domain, without granting them access to the *Drive* domain. Users with access to this domain can't view Drive files managed by other security domains. Examples: Learning course files or Worksheets workbooks.

Business Processes

No impact.

Reporting

Report	Considerations
Create Media Import Job	Enables you to import large volumes of video packaged content files into Workday.
Maintain Dashboards	Enables you to add video announcements to any Workday-delivered dashboard, custom dashboard, or landing page.
Media Import Job History	Enables you to export media reports into Excel.
View Media Import Jobs	Enables you to view a history of media imports in your tenant.

Integrations

No impact.

Connections and Touchpoints

You can use Workday Media in these product areas:

Features	Considerations
Drive	Add videos to Slides.
Integrations	Add videos to Workday Extend apps.
Learning	Add videos to courses and lessons.
Navigation	Add videos to dashboards and landing pages.
Notifications	Add videos to campaigns.
People Experience	Add videos to journeys and knowledge articles.
Recruiting	Add videos to job requisitions and onboarding resources.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Concepts

Setup Considerations: Learning

Concept: Managing Files and Folders in Drive on page 422

Reference

FAQ: Uploading and Viewing Videos on page 455

Steps: Publish Videos in Workday

Prerequisites

- Enable the required upload and playback domains for your data center.
- Complete the Workday Readiness Check.

Context

You can publish videos to use in different places in Workday. You can edit videos in various ways, depending on where you use the video. When you use a video in:

- Announcements and External Career Sites, you can add captions to either overlay or display alongside the video.
- Workday Learning, you can add captions, as well as notes and questions to test and promote viewer engagement.

Workday recommends that you review the Acceptable Use Policy before publishing content.

Steps

1. Sign up for Workday Media Cloud.

   See Getting Started with Workday Media Cloud.
2. Access Drive from the Workday main menu.

   Upload a video to Drive.

   Security: *Drive* domain in the System functional area.
3. Double-click the video and select Edit Media.

   Security: *Manage: Media* domain in the Backpack Hub Service functional area.
4. (Optional) Edit the video.
5. Click Publish.

Related Information
Reference
Reference: Editing Videos on page 453
The Next Level: Learning Video Interactions
Workday Community: US Region - Ashburn Data Center
Workday Community: Workday Readiness Check

Steps: Import Media

Context

You can import large volumes of video and packaged content media files into your tenant to deliver to workers.

Steps

1. Edit Domain Security Policies.

   For the Backpack Hub Service functional area, enable and grant security groups permission to the *Manage: Media Import* domain.
2. Activate Pending Security Policy Changes.
3. Access the Create Media Import Job report.
   a) Assign a media owner.
   b) Copy the S3 Path and access key information from the User Credentials section.

   Security: *Manage: Media Import* domain in the Backpack Hub Service functional area.

Option	Description
S3 Path	The path portion of the URL for the Amazon S3 storage location.

Option	Description
Access Key ID	A unique identifier that's associated with the Secret Access Key.
Secret Access Key	A code that you use together with the Access Key ID to sign Amazon Web Service (AWS) requests cryptographically.
Server	The Amazon S3 server location, based on whether your tenant region is U.S. or EU: • workday-mediaimport-us.s3.amazonaws.com • workday-mediaimport-eu.s3.amazonaws.com Some third-party tools require access to these server domains.

Note: When copying and pasting credentials, make sure to avoid pasting unwanted leading or trailing characters, which can cause an authentication failure message when you try to connect.

4. Import media files.

   Use a third-party tool to upload Workday-supported media files to the Amazon S3 storage location.

   See:

   - FAQ: Uploading and Viewing Videos on page 455
   - FAQ: Packaged Content

Next Steps

Access the:

- Media Import Job Historyreport to export media reports into Excel.
- View Media Import Jobs report to view a history of media imports in your tenant.

Related Information
Reference
The Next Level: Learning Data Conversion Series
Workday Community: File Transfer Client Guide
Workday Community: Media Importer User Guide

Concept: Best Practices for Creating Videos

To maximize results and minimize the risk of conversion and playback issues, we recommend that you follow these guidelines for uploading videos in Workday.

Container Format

Package your videos in .mp4 format.

Video Size and Resolution

Use smaller videos with lower resolution, because large videos encoded in higher resolutions can significantly reduce the overall bandwidth of your network.

Compression Guidelines

Compress large video files, such as lecture capture files, to reduce storage space and increase upload speed. Compressing your video can reduce its quality, so be careful not to compress it too much. The goal is to reduce the size of the video file without visibly reducing its quality.

Video file size limit is 20 GB, except for SCORM and AICC files, which have a limit of 4 GB.

Encoding Settings

Encode your videos with:

- 16:9 aspect ratio.
- 4:2:0 color space.
- Progressive scan (no interlacing).
- Square pixels.
- Constant frame rate.

Use a frame rate that matches the source material.

Dimensions and Bit Rates

Use these video dimensions and bit rates:

- 854x480 at 2,500-5,000 kbps.
- 1280x720 at 5,000-10,000 kbps.
- 1920x1080 at 10,000-20,000 kbps.

Reference: Editing Videos

Edit your videos to add interactions, upload captions, and configure settings. You can preview your edits by clicking the eye icon on the video.

Interactions

When viewers reach a marker on a video timeline in Workday Learning, the video pauses and a sidebar displays the interaction associated with the marker. Once viewers respond to the interaction, the video resumes playback until it reaches another interaction or the end of the video.

You can use any combination of these interactions to create an engaging playback experience in Workday Learning:

Interaction	Description	Scoring
Multiple Choice	Enables you to test viewer engagement by displaying a question and potential answers. You can mark more than 1 answer as correct. There isn't a limit to how many answers you can add.	Workday scores Multiple Choice interactions as *Correct* or *Incorrect*. Viewers can select only 1 answer as their choice.
Open Response	Enables you to solicit a response from viewers by displaying a question and open forum for response.	Workday doesn't score Open Response interactions.
Text Note	Enables you to provide viewers with additional context or information by displaying a note.	Workday doesn't score Text Note interactions.

Interaction	Description	Scoring
Checkbox	Enables you to test viewer engagement by displaying a question and potential answers. You can mark more than 1 answer as correct. There isn't a limit to how many answers you can add.	Workday scores Checkbox interactions as *Correct* or *Incorrect*. Viewers must select all correct answers and none of the incorrect answers to receive a Correct score.

Captions

You can add captions to videos that either display on top of or below the video as a full transcription. How the caption displays depends on whether the viewer selects the *Captions* or *Transcriptions* icon from the video control bar.

Option	Description	More Information
Upload Files	Enables you to upload a transcription text file that displays as either the video captions or transcriptions. Specify a language for each file you upload so that viewers can select their preferred language. There isn't a limit to how many caption files you can upload. Workday supports caption files in these formats: • .dfxp • .srt • .ttml • .vtt • .xml	
Use Files	Workday automatically generates video captions in machine.vtt files when you: • Enable video captioning in the Media Settings section on the Edit Tenant Setup - System task. • Upload videos in English, French, or Spanish. Caption quality can vary depending on audio clarity, regional accents, unique business terminology, and other factors. You can correct captions by downloading, editing, and reuploading the files.	Reference: Edit Tenant Setup - System on page 164 To use automatic video captioning, you might need to take additional steps to set up Media Cloud based on your organization's subscription service agreement. SeeGetting Started with Media Cloud.

Settings

Configure settings for videos that you use in Workday Learning:

Setting	Description
Skip Restrictions	Prevents viewers from skipping ahead in the video.
Limit Question Attempts	Restricts the number of times a viewer can answer a question to 1. Workday automatically enables skip restrictions when you select this check box. Workday doesn't support this setting on Android or iOS mobile applications.

Status

Status	Description
Save draft	Your configurations don't display during playback until you publish the video.
Publish	Publishing a video replaces any previous interactions or captions. When you add a video with interactions to more than 1 place in Workday, each video contains the same interactions, but Workday stores and tracks interaction responses separately.

Related Information
Reference
The Next Level: Learning Video Interactions
2022R1 What's New Post: Video Interaction Timestamps

FAQ: Uploading and Viewing Videos

What can I do to ensure that the Media Upload service is available?	• Have a valid Workday Media contract. • Test your network to check for network errors. • Enable the required upload and playback domains for your data center.

Which video file formats does Workday support?	Workday supports most nonproprietary video formats. We recommend using these formats: .3g2, .3gp, .3gpp, .asf, .avi, .divx, .f4v, .flv, .m2ts, .m4v, .mkv, .mov, .mp4, .mts, .vob, .webm Workday doesn't support proprietary formats such as Apple ProRes or WebEx. Convert videos to nonproprietary formats before uploading them to Workday.
Is there a limit to the number of files that I can upload?	No.
What is the file size limit on individual uploads?	20 GB, except for SCORM and AICC files, which have a limit of 4 GB.
What can I do when my upload takes an abnormally long time to complete?	• Test the network performance at Workday Readiness Check. • Enable the required upload and playback domains for your data center.
Does Workday encode video files?	Yes. Workday encodes the original video in variants of each quality. Depending on the quality of the original file, Workday supports a maximum of 1080p HD.
Does Workday support closed captions on videos?	Yes. You can add closed captions to videos in multiple languages. See Steps: Publish Videos in Workday on page 450. You can also enable Workday to generate video transcriptions automatically and display them during playback. See Reference: Edit Tenant Setup - System on page 164. Note: When you copy a media file with closed captions, Drive copies only the video content. You need to copy the closed captions separately.
Why is my video playback quality so poor?	Workday automatically modifies the quality of your video playback based on your network bandwidth. If your network has low bandwidth, Workday plays the video at a lower quality in order to load the content faster. If you want, you can manually adjust the quality of your video playback.
Why is a video freezing or buffering?	Network interference from other applications can cause playback issues. We recommend that you: • Close any other video or streaming applications or streaming audio that might consume network bandwidth.

Recommended formats table:

.3g2	.3gp	.3gpp	.asf
.avi	.divx	.f4v	.flv
.m2ts	.m4v	.mkv	.mov
.mp4	.mts	.vob	.webm

	• For mobile devices, downgrade the video quality. Workday automatically downgrades the video quality if buffering persists on iOS devices. You must manually downgrade the quality on Android devices. • Test the network performance at Workday Readiness Check.
How does Workday select the thumbnail image for a video?	If a video length is: • 10 seconds or less, Workday displays the image at the zero second mark of the video as the thumbnail. • More than 10 seconds, Workday displays the image at the 10 second mark of the video as the thumbnail.
Can I use keyboard shortcuts to control playback?	Yes. You can use these keyboard shortcuts when watching videos:
How can I report playback issues that I can't resolve myself?	Right-click in the player and select Report Playback Issue. The video player runs diagnostics and saves important diagnostic information in a log file. Take note of the displayed Reference ID so that you can provide the number to Workday Support.

Keyboard Command	Description
C	Workday opens captions.
T	Workday opens transcriptions.
M	Workday mutes or unmutes the video.
Shift+Up Arrow	Workday increases playback volume.
Shift+Down Arrow	Workday decreases playback volume.

Related Information
Reference
The Next Level: Learning Data Conversion Series
Workday Community: US Region - Ashburn Data Center

Links

Create External Links to Third Party Systems

Prerequisites

Security: *Set Up: System* domain in the System functional area.

Context

You can add external links to third party systems directly from supported worklets. Any links you add appear under an External Links heading on the worklet.

Steps

1. Access the Configure Worklet task for a supported worklet.
2. In the External Links section, add SAML SSO Links or Quicklinks as needed. This section appears only for supported worklets.
3. (Optional) Create an external link rule to create links that appear only for the Current Worker under the specified conditions.
    a) Access the Create External Link Rule task.
    b) (Optional) Use the Copy Condition from Rule option. The condition rule you copy must also be based on Current Worker.
    c) Define the Rule Conditions.

Related Information

Tasks

Create Business Process Condition Rules on page 1011

Create or Edit SAML SSO Links

Maintain Quicklinks

Create Direct Links to Initiate Business Processes

Prerequisites

Security: *Manage: Links to Workday* domain in the System functional area.

If you've configured your tenant to use SAML authentication, you must enable Service Provider-initiated SAML to use this feature.

Context

You can generate URLs that directly link to the initiation steps of some business processes in Workday.

Links are specific to the environment in which you create them. Example: If you want a link to your production environment, you must run this task in your production environment.

Note: Workday recommends that you review the What's New in Workday report to verify generated links referencing tasks that Workday includes in the report. Workday generated links can break after an update if Workday makes extensive changes to the task that the link references. Example: Workday releases a completely new version of a task and discontinues the previous version. Extensive task changes occur infrequently, and we describe all task changes in the What's New in Workday report.

Steps

1. Access the Create Link to Initiate Business Process report.
2. Select a task.

    The Select Task prompt displays all of the enabled business process initiation tasks that you have access to.

Result

Workday displays the direct URL to the task. You can copy the URL to create a link in a web page or in an email.

If the user hasn't yet signed in, the link takes them to the sign-in page and Workday displays the task after successful authentication. If the user doesn't have permission to complete the task, Workday displays a message instead.

Related Information

Tasks

Configure Identity Provider-Initiated and Service Provider-Initiated SAML Authentication

Reference

Reference: Edit Tenant Setup - Security on page 144

Concept: Worklets that Support External Links

Certain worklets support external links to third party systems. These links appear directly on the worklet under the External Links heading. Supported worklets include:

Financials:	• My Projects • Project Tasks • Purchases – ESS • Expenses – ESS • Spend Management – MSS
Payroll:	• Pay. • Timesheets • Time Off ESS • Time Off MSS
HCM:	• Benefits • Career • Compensation • Contingent Workers • Directory • Employee Changes • Hiring • Performance MSS • Performance ESS • Personal Information • Safety • Talent

Calendars and Schedules

Steps: Create Calendars

Context

A calendar is a list of time-based events with a specific purpose. Example: A calendar that lists the days your offices are legally closed and when employees have mandatory days off.

Applications including Workday Time Tracking, Absence Management, Payroll, and Student can refer to calendars for holiday and work schedule information. Example: You use a calendar to prevent employees from requesting time off on Presidents Day, or from requesting more hours than they're scheduled to work.

In Workday Student, an institution's academic calendar includes the holiday calendar as part of its noninstructional days.

System administrators and implementers can create holiday and work schedule calendars and assign 1 or more calendars to workers.

Steps

1. Create Rules for Assigning Calendars on page 460.

   Create calendar rules to define the different populations of workers or students to whom you will assign holiday or work schedule calendars.
2. Create Holiday Calendars on page 466 and Create Work Schedule Calendars on page 461.

   Create calendars from scratch or copy existing calendars and modify them.
3. Add Calendar Events on page 467.

   Example: Add holidays to holiday calendars, then define daily work schedules and add them to work schedule calendars.

Related Information
Reference
The Next Level: Overview of Scheduling
The Next Level: A Deep Dive Into Calendar Scheduling
The Next Level: PATT Touchpoints with Assignments

Create Rules for Assigning Calendars

Prerequisites

- Define the objects (such as job profiles or locations) on which to base calendar rules.
- Security: *Set Up: Calendar* domain in the System functional area.

Context

Calendar rules enable you to assign holiday and work schedule calendars to workers. They define the conditions that workers must meet for Workday to assign them a calendar.

Calendar rules are similar to condition rules used in business processes in Workday. When you change a calendar rule, Workday applies the change to any retro events you create, but Workday doesn't automatically create a retro event.

Note: For workers assigned multiple calendars, events that occur on the same date cause the workers to receive the sum of the time from the events. Example: A worker is assigned 2 calendars and an event occurs on both on the same date, the worker receives the sum of both events.

Steps

1. Access the Create Holiday/Work Schedule Calendar Rule task. As you complete the task, consider:

Option	Description
Copy Condition from Rule	(Optional) Select to create a new rule based on a similar existing rule. You can modify the copied conditions for the new rule.
Source External Field or Condition Rule	Select the field or rule that you want to base the rule condition on.

	The context where the condition is used determines the available fields and their values. A subrule is another condition rule that is relevant tot he same business object and that evaluates to true or false.
Relational Operator	Select to define how you want the rule condition to handle the field or subrule.
Comparison Type	Select to indicate how you want the rule condition to compare the specified value to the field or subrule.
Comparison Value	Enter or select the Comparison Value the rule condition will use to compare to the selected field or subrule.

2. When there are 2 or more conditions:
    - Use the up and down arrows to arrange them in the Order in which you want them evaluated.
    - Set the And or Or option at the beginning of each statement to control how it's used with the line directly before it.
3. Use the parentheses columns when you've 3 or more logical statements and a combination of Ands and Ors.

    Example: You want to say (a and b) or c. Add these rows:

And/Or	(	Condition Rule	)
	(	a	
And		b	)
Or		c	

Example

To assign the same work schedule calendar to all employees in a particular company and region, create a calendar rule that selects only those employees. Assign the rule to the appropriate work schedule calendar.

Next Steps

- Add calendar rules to holiday and work schedule calendars to assign calendars to different worker populations.
- Review the condition statements for calendar rules and see which calendars use the rules on these reports:
    - View Holiday/Work Schedule Calendar Rule
    - View Holiday/Work Schedule Calendar Rules

Create Work Schedule Calendars

Prerequisites

- Create Rules for Assigning Calendars on page 460.
- Security: *Set Up: Calendar* domain in the System functional area.

Context

You can define the:

- Days and hours that workers are scheduled to work.
- Extent to which workers can edit their own schedules.

When using Workday Time Tracking, you must assign all workers a work schedule calendar. The work schedule controls the:

- Scheduled hours when you enable the Include Scheduled Hours setting for a standard overtime calculation.
- Start day of the week for the:
    - Time entry calendar.
    - My Schedule and View Schedule for Worker reports.
- Shading of unscheduled work days on the time entry calendar.
- Hours that Workday automatically populates on the time entry calendar.
- Return values from Time Tracking report fields that include scheduled hours or days.
- Workers who are eligible for biweekly time calculations.

To enable workers to request time off for work days that aren't holidays, configure Days to Include on the relevant time off plan on work schedule calendars In Workday Absence Management.

When using Workday Absence Management, for optimal performance:

- Create at least 1 generic work schedule in your Workday tenant that covers most of your workers' schedules. Example: 8 AM to 5 PM for weekdays.
- Create individual work schedules and manually assign them to workers with unconventional work schedules.
- Create a calendar rule on the generic work schedule to assign a default work schedule to all workers. You can use the Assign Work Schedule task to override the default rule on work schedule calendars.

When using Workday Scheduling, you can use work schedule calendars to create static schedules for workers whose schedules don't change significantly from week to week.

Steps

1. Access the Create Work Schedule Calendar task. As you complete the task, consider:

Option	Description
Schedule Summary	Enter a short description to display when a worker edits their schedule. Include information that helps workers make changes within the parameters of their work schedule calendars. Examples: *3 scheduled days/week*, *Max 40 hours/ week*.
Description	(Optional)Enter a longer description to differentiate this work schedule calendar from other work schedule calendars. Example: *Mexico - Hourly - Night Shift*.
Calendar Rule	Select a rule to assign the calendar to workers. Note: When a worker has multiple calendars, coinciding events cause them to receive the sum of the time from the events. Example: When you assign 2 calendars to a worker and an event occurs on both calendars

Option	Description
	on the same date, the worker receives the sum of both events.
Work Schedule Calendar Group	(Optional) Select or create a new calendar group to include the schedule in.

2. (Optional) As you complete the Time Tracking section, consider:

Option	Description
Day Breaker	The start time and end time of the work week. This enables workers to enter time for an entire work week at once. When you select a time other than midnight, the time entry calendar displays 8 days for the work week. Example: The work week begins on 12:00 PM PST Saturday, so workers can enter time through 12:00 PM PST on the next Saturday. Workday uses the Day Breaker time as the start time of each work day. A worker's actual start time, such as the beginning of a shift, can be later.

Day Breaker Divides	When the Day Breaker isn't midnight (12:00 AM PST), select whether Workday assigns the reported calendar date to calculated time blocks that are before or after the day breaker. When a reported time block crosses the day breaker, Workday splits it into 2 calculated time blocks.
	
	When you select:
	• *Current day from previous day*, Workday assigns the:
	    • Previous calendar date to calculated time blocks that occur before the day breaker.
	    • Reported calendar date to calculated time blocks that occur after the day breaker.
	• *Current day from next day*, Workday assigns the:
	    • Reported calendar date to calculated time blocks before the day breaker.
	    • Next calendar date to calculated time blocks after the day breaker.

Work Week Start Day	Select the day on which each work week begins. Workday automatically populates this field with *Sunday*. The work week start day determines: • The first day of the week that a worker's time entry calendar displays.

Option	Description
	• The first day of the week displayed on the My Schedule and View Schedule for Worker reports. • The period to consider for weekly and biweekly overtime calculations (along with the day breaker).
Biweekly Calculation Start Date	Enter the date on which biweekly calculations begin. The date must fall on the same day of the week as the Work Week Start Day. When you add a biweekly calculation start date, workers who you assign to this calendar become eligible for biweekly overtime calculations when they're in time calculation groups that include biweekly time calculations.
Configurable Calculation Period	Select the period of time over which Workday calculates overtime for period-based overtime calculations. You can create standard overtime calculations to pay workers after they work a certain number of hours during this period of time. For performance reasons, you must select a period between 2 and 31 days.

3. (Optional) Complete the Scheduling section.

   Select the Enabled for Static Scheduling check box to use this work schedule calendar for static schedules in Workday Scheduling.

   See: Steps: Set Up Static Scheduling.
4. (Optional) If the work schedule calendar uses schedule patterns, create them on the Patterns tab.

   Schedule patterns are recurring sets of start, end, and meal times that occur over a 7-day period. You can use schedule patterns instead of calendar events.

   a) In the Pattern Start Date field, select the date on which the patterns begin cycling.

      The Pattern Start Date determines the Pattern Start Day. The Pattern Start Day is the first day of the week displayed when you edit days individually on the My Schedule report.

   b) Select Pattern Details on each week to enter start, end, and meal times on the individual days of the schedule pattern.

      Select the 24-Hour Shift check box if the shift is all day. The 24-hour shift begins and ends at midnight.

   c) You can add as many as 53 weeks to the grid. To copy values from an existing week to a new one, click the add button for the week you want to copy.

      Note: If you create a pattern of more than 2 weeks, you can't enable workers to edit their own schedules.
5. (Optional) On the Worker Editing Options tab, configure the extent to which workers can edit their own schedules. As you complete the tab, consider:

Option	Description
Enable Worker Editing Options	To enable worker editing options, the work schedule calendar must: • Use schedule patterns instead of calendar events.

Option	Description
	• Have a schedule pattern that is no more than 2 weeks long. The schedule patterns must conform to any restrictions you define here.
Change Scheduled / Non-Scheduled Days	Select to enable workers to change the days they're scheduled for.
Enable Hours Restrictions	Select to configure the minimum and maximum number of hours workers must work per day or week.
Uniform Start and End Times	Select if all start, meal start, meal end, and end times must be identical for each scheduled day. Example: A worker's schedule starts at 9:00 AM every weekday. If they want to start at 8:00 AM on Fridays, they have to change their schedule to start at 8:00 AM every day.
Minimum Duration Maximum Duration	Enter the minimum and maximum number of minutes that workers can edit their scheduled meals to be.

6. (Optional) On the Flextime Bands tab, configure core and flexible time bands. You can use flextime bands alone, with schedule patterns, and with calendar events.
   a) Add a row to the table.
   b) Create core bands for mandatory work hours.
   c) Create flextime bands. Select Morning Flex and Evening Flex if you want to tag those hours differently.
7. (Optional) Configure the *Self-service: Work Schedule* domain so that workers can make self-service edits to their schedules.

   Add the *Employee-as-Self* Security group and grant Modify permissions.

Result

If the work schedule calendar uses schedule patterns, you can immediately view and edit workers' schedules.

The Schedule Calendar Events tab displays any calendar events. You can only add calendar events to existing work schedule calendars that don't use schedule patterns.

Next Steps

If the work schedule calendar:

- Doesn't use schedule patterns, add calendar events.
- Uses flextime bands, create a flextime calculation to tag each category of band. See Create Flextime Calculations.

Access 1 of these reports to see a worker's assigned holiday or work schedule calendars:

- Audit - Workers with Multiple Work Schedule Calendars
- View Work Schedule Calendar
- View Worker Calendars

- View Worker's Time Eligibility

Related Information

Concepts

Concept: Day Breakers on page 476

Concept: Flextime Bands

Setup Considerations: Time Off Plans

Reference

The Next Level: Overview of Scheduling

The Next Level: A Deep Dive into Calendar Scheduling

The Next Level: 9/80 Schedules

Create Work Schedule Calendar Groups

Prerequisites

- Create work schedule calendars.
- Security: *Set Up: Calendar* domain in the System functional area.

Context

You can create work schedule calendar groups to organize large volumes of work schedule calendars and make them easier to manage. Workday displays each calendar group in the Work Schedule Calendar prompt that workers and managers use when they assign, request, or view a work schedule calendar. Creating calendar groups helps reduce error by enabling workers and managers to more easily identify the schedule that's relevant to them.

Steps

1. Access the Create Work Schedule Calendar Group task.

   You can also add work schedule calendars to calendar groups while creating or editing a work schedule calendar.
2. Enter a unique name that describes the work schedule calendars in this group. Example: *Canada* or *Canada - BC*.

   This name is visible to manager self-service and employee self-service workers.
3. Select Work Schedule Calendars to include in this group.

Result

You can now select a work schedule calendar from a calendar group on these tasks or on the View Work Schedule Calendar report:

- Assign Work Schedule
- Edit Work Schedule Calendar
- Request Work Schedule

Next Steps

Use the View Work Schedule Calendar Group report to view all of the work schedule calendars included in a calendar group.

Create Holiday Calendars

Prerequisites

- Create calendar rules so that you can assign the holiday schedule to workers.

- Security: *Set Up: Calendar* domain in the System functional area.

Context

Create a calendar that lists holidays. When you use holiday calendars with:

- Time Tracking, they affect the dates that are considered holidays on a worker's time entry calendar. Holiday calendars also affect the results of Time Tracking report fields that are based on holidays.
- Absence Management, they affect the dates that are considered holidays when workers are requesting and viewing absence on calendars that display time off and leave. Holiday calendars also affect the results of Absence report fields that are based on holidays.
- Student, they affect the total weeks of instruction, which Workday uses in multiple financial aid calculations. Holidays also affect the number of break days, which Workday uses when calculating Return of Title IV funds.

If you use an Enterprise Interface Builder (EIB) integration to upload data for an existing holiday calendar, include calendar rules in the EIB. Otherwise, Workday removes the calendar rules on the existing holiday calendar.

Steps

1. Access the Create Holiday Calendar task.
2. (Optional) Select a Country / Country Region.

   The Country / Country Region prompt enables you to:

   - Filter calendar rules based on workers' location.
   - Assign a location-based eligibility rule.

   For workers with multiple positions, the filter looks at the worker's location for the primary position.
3. (Optional) Select a Calendar Rule to assign the calendar to workers.

   Use the Country / Country Region prompt to assign a location-based eligibility rule instead of adding a location-based calendar rule.

   Note: For workers assigned multiple calendars, events that occur on the same date cause workers to receive the sum of the time from the events. Example: If 2 calendars are assigned to a worker and an event occurs on both calendars on the same date, the worker receives the sum of both events.

Next Steps

- Add holidays to the calendar.
- Access the View Worker Calendars report to see a worker's assigned holiday and work schedule calendars.
- Access the View Worker's Time Eligibility report to verify if the worker is required to work the day before or after a holiday, or both days.

Related Information

Reference

The Next Level: Overview of Scheduling

The Next Level: A Deep Dive into Calendar Scheduling

Add Calendar Events

Prerequisites

- Create work schedule calendars, holiday calendars, or both.
- Security: *Set Up: Calendar* domain in the System functional area.

Context

A calendar event is an entry in a holiday or work schedule calendar that spans a certain duration.

Workers can't edit their own calendar events. To enable workers to edit their work schedules, configure their work schedule calendars to use schedule patterns instead. Use calendar events if you need to schedule more than 1 shift or meal per day.

Steps

1. Access the relevant report:
    - View Holiday Calendar
    - View Work Schedule Calendar
2. From the related actions menu of the calendar, select Calendar > Add Calendar Event.
3. (Optional) For work schedule events, enter a Display Name to display on work schedules in Time Tracking.

    Without a display name, the calendar event details display in Time Tracking without a name.
4. Define the duration of the event:
    - Enter the Start Time, End Time, and End Date or
    - Select All Day Event if the event represents 24 hours.
5. (Optional) Add Meals to work schedule events that have start and end times.

    You can add up to 2 meals to a work schedule event. Workday subtracts the meal duration from the total duration of the event.
6. If the event is recurring, select the Recurrence Interval to activate the Daily, Weekly, or Monthly fields.

    One Time Event is relevant when the event never repeats or it occurs at unpredictable intervals. Example: A company holiday that occurs in a different month every year.

    If a holiday occurs every year, set it up as a recurring event.
7. In the Recurrence Range section, specify how long the event recurs.

    Enter an End Date or leave the End Date blank to have the event recur indefinitely.

    Example: Leave the End Date blank to have the New Year's Day holiday recur every year.

Example

Define work hours for a work schedule calendar

Hourly workers who enter in/out times are scheduled to work the following hours Monday through Friday:

- 8:00 AM to 12:00 PM
- 1:00 PM to 5:00 PM

Create a work schedule calendar called *In/Out Schedule* and add an event called *Workers with In/Out Time*:

Field	Value
Start Date	*2016-01-01*
Start Time	*8:00 AM*
End Date	*2016-01-01*
End Time	*12:00 PM*

Field	Value
Recurrence Interval	*Daily Recurrence*
Recurs Every Weekday	Select this option

Add a second event for the hours from 1:00 PM to 5:00 PM.

Add a recurring holiday that has the same date each year	You want to add New Year's Day to your holiday calendar and have the holiday recur every year. Access the calendar and add an event with these values:

Field	Value
Start Date	*2016-01-01*
Start Time	*8:00 AM*
End Date	*2016-01-01*
End Time	*5:00 PM*
Recurrence	*Monthly Recurrence*
Month(s)	*January*
Day(s) of the Month	*1st*

Add a recurring holiday that occurs the first Monday of September	Access the holiday calendar and add an event that recurs every year:

Field	Value
Start Date	*2016-09-05*
Start Time	*8:00 AM*
End Date	*2016-09-05*
End Time	*5:00 PM*
Recurrence	*Monthly Recurrence*
Month(s)	*September*
Day of the Week in Month	*First Monday*

Next Steps

Managers can view and edit work schedule blocks for their direct reports in a daily or weekly calendar view on the My Team's Schedule report for Workday Time Tracking.

Related Information

Reference

The Next Level: Overview of Scheduling

Copy Calendars

Prerequisites

Security: *Set Up: Calendar* domain in the System functional area.

Context

Copy an existing calendar and modify it to meet your needs. When you copy a calendar, you also copy its events, but not the calendar rules that assign calendars to workers, positions, pay groups, companies, or locations.

Steps

1. Access the Copy Calendar task.
2. Select the calendar to copy and click OK.
3. Enter a unique name for the calendar.
4. Enter a description.
5. Click OK.
6. (Optional) To add a calendar event, select Calendar > Add Calendar Event from the related actions menu of the work schedule calendar or holiday calendar.
7. (Optional) To edit or delete an existing calendar event, select Calendar Event > Edit or Calendar Event > Delete from the related actions menu of a calendar event.

Example

In the United States, you might need to create a regional variation of a holiday calendar for workers in states that have a subset of federal holidays.

Automatically Assign Work Schedule Calendars

Prerequisites

- Create Rules for Assigning Calendars on page 460.
- Align the rules with the business processes where you want to add *Assign Work Schedule* as a step.
- Security: *Set Up: Calendar* domain in the System functional area.

Context

You can enable Workday to automatically assign a work schedule calendar to a worker without requiring their manager to approve it.The *Assign Work Schedule* business process uses calendar rules to determine which work schedule calendar to assign to each worker. The worker keeps the work schedule calendar until another business process changes it.

You can automatically assign work schedule calendars on any of these business processes:

- *Add Additional Job*
- *Assign Matrix Organization*
- *Assign Pay Group*
- *Change Job*
- *Change Organization Assignment for Worker*
- *Contract Contingent Worker*
- *Edit Position*
- *End Additional Job*
- *End Contingent Worker Contract*

- *End International Assignment*
- *Hire*
- *Move Worker by Supervisory*
- *Move Workers by Organization*
- *Remove from Matrix Organization*
- *Request Leave of Absence*
- *Request Return from Leave of Absence*
- *Start International Assignment*
- *Switch Primary Job*

Steps

1. Access the *Assign Work Schedule* business process.
2. From the related actions menu, select Business Process > Edit Definition.
3. Select the Enable Autocomplete check box.

   If you don't want to use autocomplete for all workers, create separate definitions or set up rule-based definitions. Workday runs rule-based business process definitions before organization-based definitions.
4. Access the business process definition where you want to automatically assign a work schedule calendar.
5. If there's no completion step, edit one of the steps to make it the completion step. If there are no steps, add a completion step.
6. Edit the business process to configure the *Assign Work Schedule* business process as a subprocess.

   The *Assign Work Schedule* subprocess step is an action or service step and must be after the completion step.

   If you already have *Assign Work Schedule* as a step in the *Hire* or *Change Job* business process, make sure it is after the completion step.

Result

When Assign Work Schedule is configured as a step on a business process, these are possible outcomes:

- If the worker is eligible for a new work schedule calendar, Workday automatically makes the assignment without creating a My Tasks notification.
- If the worker has a direct assignment to a work schedule calendar and you start the assign work schedule subprocess using Autocomplete, and the worker is eligible for the same work schedule calendar. Workday doesn't make an update. This limits the number of times Workday has to check work schedule calendar eligibility for the worker.
- If Assign Work Schedule is an action step and the worker isn't eligible for any work schedule calendar, Workday sends a My Tasks notification to the manager.
- If Assign Work Schedule is a service step and the worker isn't eligible for any work schedule calendar, Workday doesn't send a My Tasks notification to the manager. Service steps don't have any user interaction.
- If Assign Work Schedule is a step on *Move Workers By Organization*, *Change Organization Assignments for Worker*, or *Move Worker Supervisory*, and you select an open requisition then Workday shows the Assign Work Schedule step as Not Required and doesn't run the step.
- If a mix of open positions and workers are selected for *Move Workers By Organization*, Workday creates My Tasks notifications for the open positions, but shows Action No Longer Available because there isn't an action for the manager to take.

Example

Your work schedules are based on job profiles. You add *Assign Work Schedule* as a subprocess on the *Change Job* business process. When the worker's job changes, Workday evaluates work schedule calendar eligibility and assigns the new work schedule calendar.

Next Steps

View changes in work schedule calendar assignments on these reports:

- View Worker's Time Eligibility
- Schedule History for Worker

Related Information
Reference
2022R1 What's New Post: Assign Work Schedule Calendar Subprocess

Manually Assign Work Schedule Calendars

Prerequisites

- Create work schedule calendars.
- Configure the *Assign Work Schedule* business process and security policy in the Time Off and Leave and Time Tracking functional areas.

Context

Typically, Workday uses calendar rules to automatically assign work schedule calendars to workers. However, you might sometimes need to override the calendar rules and manually assign work schedule calendars to individual workers. Example: An employee changes to a compressed work week, but none of their worker data changes.

This feature is not intended for short-term, ad hoc scheduling changes.

Steps

1. Access the Assign Work Schedule task.
2. Select the Worker for whom you wish to assign a work schedule calendar.
3. Select a Start date and, optionally, an End date.
4. Select a Work Schedule Calendar.

Result

During the time period you specified, the worker uses the work schedule calendar you assigned. If the worker ends up with overlapping work schedules, the most recently assigned schedule takes precedence. After the end date, the worker reverts to their default work schedule calendar. If the worker doesn't have a default work schedule calendar, they return to having no work schedule calendar after the end date.

Next Steps

- If you changed a worker's schedule in the middle of a period, you may need to use the Adjust Calculated Time task to adjust their time calculation results.
- Review the View Worker's Time Eligibility report to validate your changes.
- If you need to edit a large volume of schedule assignments at once, you can use the Manage Work Schedule Assignments report.

Related Information

Reference

Reference: Work Schedule Calendar Assignment Precedence on page 481

Manage Ad Hoc Work Schedule Changes

Prerequisites

Security: *Worker Data: Work Schedule* domain in the Time Tracking functional area.

Context

Make ad hoc changes to accommodate exceptions in a worker's schedule.

Workday translates work schedule calendar events with start and end times into schedule blocks that display in Time Tracking. Any ad hoc changes you make in Time Tracking only affect the schedule blocks; the worker's work schedule calendar remains unaffected.

Steps

1. Access the My Team's Schedule report.
2. Select a Date and the Workers whose schedules you need to change.

   You can use this report to view and edit any or all of your direct reports' schedules. Consider only selecting direct reports that require comparison or action, in order to boost task efficiency.
3. To add an event, click Add Event.
4. To edit or delete an event, click the event.

Result

These reports reflect the schedule changes:

- My Team's Schedule
- View My Schedule (for the self-service worker)
- View Schedule for Worker

The *Auto-fill from Schedule* time entry option also includes the schedule changes.

Related Information

Tasks

Add Calendar Events on page 467

Reference

The Next Level: Overview of Scheduling

The Next Level: A Deep Dive into Calendar Scheduling

Reference: Work Schedule Calendar Assignment Precedence on page 481

Steps: Enable Managers to Create and Assign Custom Work Schedules

Prerequisites

- Security: *Set Up: Calendar* domain in the System functional area.
- Create and assign work schedule calendars.

Context

You can enable managers to create and assign worker-specific schedules based on schedule patterns. Enabling this feature gives managers more control and flexibility to assign unique schedules to workers rather than having to select from a list of existing work schedule calendars configured by administrators.

Managers can then add or remove shifts or meals from the schedule pattern when a worker's schedule changes, without requiring an administrator to take any action.

Steps

1. Configure the *Assign Work Schedule* business process and security policy in the Time Tracking functional area. Grant managers access to the Assign Custom Work Schedule initiating action.
2. Create Work Schedule Calendars on page 461.

   Workday recommends that you create at least 1 default work schedule calendar with patterns and assign it to workers. Creating a default calendar ensures that the correct Time Tracking configuration options populate when managers create custom work schedules. Workday automatically applies these Time Tracking options to the worker's new work schedule based on their work schedule calendar assignment:

   - Daybreaker
   - Day Breaker Divides
   - Start Day of Week
   - Biweekly OT Calculation Date
   - Configurable Calculation Period

   A default work schedule calendar also provides a pattern for managers to use as a starting point when doing the first schedule assignment for a worker.

   To modify the Time Tracking configuration options on custom work schedules, you can use the Correct related action on work schedule assignment events. You can view work schedule assignment events using the Schedule History for Worker report.
3. Access the Assign Custom Work Schedule task.
4. Select the Worker for whom you want to assign a work schedule.
5. Select the Start Date and, optionally, an End Date.
6. Select a way to start the work schedule.

   If you select Start from Current Schedule, and the worker's current schedule is based on calendar events rather than patterns, Workday displays a blank calendar.
7. As you create the schedule pattern, in the Pattern Details grid, configure whether the pattern contains a Single Shift and Meal or Multiple Shifts and Meals.

Result

Worker-specific schedules created using the Assign Custom Work Schedule task aren't displayed in any work schedule calendar prompts or tasks other than on the Assign Custom Work Schedule task. You can't directly edit worker-specific work schedule calendars using the Edit Work Schedule Calendar task or using related actions from a work schedule calendar. You can use the Assign Custom Work Schedule task to assign a new schedule. Alternately, you can use the Correct action available as a related action from a work schedule assignment to correct it.

Next Steps

Report on worker-specific work schedules using these data sources:

- Active Work Schedule Assignment Events
- All Historical Work Schedule Assignment Events

Access 1 of these reports to view previous work schedule assignment events:

- My Schedule History
- Schedule History for Worker

Related Information

Reference

Reference: Work Schedule Calendar Assignment Precedence on page 481

Mass Add End Dates to Self-Service Work Schedule Calendar Changes

Prerequisites

Security: *Process: Mass Update Schedule Assignments* domain in the Time Tracking functional area.

Context

You can use this task to mass add end dates to all recurring self-service work schedule calendar changes that don't have an end date. Workers who are able to edit their own schedules can sometimes set recurring schedule changes without an end date. Rather than updating work schedule calendars individually, you can add end dates for a large volume of calendars at once.

Note: You can't reverse these changes, so Workday recommends that you carefully review the schedules you're correcting before you run this task.

Steps

1. Access the Mass Update My Schedule Assignments Without End Date task.
2. Select an End Date.
3. Select workers from the Worker prompt.

   The prompt only displays workers who made self-service work schedule calendar changes that:

   - Are recurring.
   - Begin before the end date you select.
   - Don't have an end date.

Related Information

Concepts

Concept: Self-Service Changes to Work Schedules on page 479

Reference

Reference: Work Schedule Calendar Assignment Precedence on page 481

Inactivate Work Schedule Calendars

Prerequisites

- Create Work Schedule Calendar Groups on page 466.
- Security: *Set Up: Calendar* domain in the System functional area.

Context

You can increase performance efficiency by inactivating work schedule calendars that you're not using. Once you inactivate a work schedule calendar, you can't make edits or activate the work schedule calendar again. Workday recommends inactivating work schedule calendars instead of deleting them so that you can retain work schedule calendar historical data.

Inactivate work schedule calendars:

- That doesn’t have any assignments.
- With assignments that have an end date before the date on which you want to inactivate the work schedule calendar.

You can't inactivate work schedule calendars that are part of a work schedule calendar group.

Steps

1. Access the Edit Work Schedule Calendar task.
2. On the Inactivate tab, select the Inactive check box.

Result

When you inactivate a work schedule calendar, Workday removes it from workers' calendars.

Next Steps

For a list of all work schedule calendars, access the All Work Schedule Calendars report. When you inactivate a calendar, Workday tags it as inactive.

To check the date a work schedule calendar was inactivated, access the Inactivate tab of the View Work Schedule Calendar report.

If you've enabled Workday Absence Management and workers only have inactive work schedule calendars assigned, confirm that you aren't using work days in the Days to Include on Time Off Plans and Leave Types.

Concept: Day Breakers

The day breaker on a worker's work schedule calendar defines the start time of a worker's workday and work week. The day breaker setting also specifies how Workday should assign dates to calculated time blocks.

Workday assigns the same calculated date to every time block on a day, whether or not the time blocks cross calendar days. This approach has an impact on calculations such as standard daily and weekly overtime calculations. The day breaker ensures that a calculated date represents an exact 24-hour period. As a result, daily overtime calculations apply over a 24-hour period regardless of the worker's shift or actual work times. Similarly, weekly overtime calculations apply over a 168-hour period, regardless of the worker's shift or actual work times.

When a worker clicks OK during time entry, Workday splits time blocks according to the day breaker and assigns calculated dates to calculated time blocks. The worker's reported time blocks remain on the time entry calendar as originally reported, but Workday uses the calculated time blocks to run calculations. You can view calculated time blocks on the Calculated tab of reported time blocks.

Calculated Time Block Date

When a reported time block crosses the day breaker, the Day Breaker Divides setting on the work schedule calendar determines which date Workday assigns to the calculated time block. Workday splits the reported time block into 2 calculated time blocks. Workday then assigns the appropriate date to each block based on whether you select *Current day from previous day* or *Current day from next day*.

Example: Current Day from Previous Day

The day breaker is 3:00 PM and the Day Breaker Divides setting is *Current day from previous day*.

Workday assigns:

- The previous calendar date to time blocks before the day breaker.
- The reported calendar date to time blocks after the day breaker.

Reported Time Blocks	Calculated Time Blocks
6:00 AM - 3:00 PM, February 23	6:00 AM - 3:00 PM, February 22

Reported Time Blocks	Calculated Time Blocks
11:00 AM - 5:00 PM, February 23	11:00 AM - 3:00 PM, February 22 3:00 PM - 5:00 PM, February 23
3:00 PM - 11:00 PM, February 23	3:00 PM - 11:00 PM, February 23

Example: Current Day from Next Day

The day breaker is 3:00 PM and the Day Breaker Divides setting is *Current day from next day*.

Workday assigns:

- The reported calendar date to time blocks before the day breaker.
- The next calendar date to time blocks after the day breaker.

Reported Time	Calculated Time Blocks
6:00 AM - 3:00 PM, February 23	6:00 AM - 3:00 PM, February 23
11:00 AM - 5:00 PM, February 23	11:00 AM - 3:00 PM, February 23 3:00 PM - 5:00 PM, February 24
3:00 PM - 11:00 PM, February 23	3:00 PM - 11:00 PM, February 24

Day Breaker Changes

Workday evaluates day breakers on a daily basis when calculating time so that you can change a worker's day breaker in the middle of a week.

Example: You assign a worker to a new work schedule with a different day breaker. Workday calculates the first part of the week (before the change) according to the original day breaker. Workday calculates the second part of the week according to the new day breaker.

If a worker enters time between the end of 1 day breaker and the start of the next day breaker, Workday calculates their time according to a midnight day breaker. Workday then gives their time block a calculated date of the calendar date.

Related Information

Concepts

Concept: Time Calculations

Tasks

Create Work Schedule Calendars on page 461

Reference

The Next Level: Overview of Shift

Concept: Schedule Patterns

Schedule patterns are recurring sets of start, end, and meal times that occur over a 7-day period. Work schedule calendars can contain either schedule patterns or calendar events. Schedule patterns and calendar events can both support multiple sets of start and end times, and multiple meals, per day. However, self-service workers can't edit work schedule calendars that use calendar events. Self-service workers can edit work schedule calendars that use schedule patterns when the pattern is less than 2 weeks long.

When you enable managers to create and assign worker-specific schedules, those schedules are based on schedule patterns, not calendar events.

The Pattern Start Date determines the first day of a pattern (the Pattern Start Day, which controls which day displays first when you edit scheduled days individually). The Pattern Start Date also determines when the patterns begin cycling. The My Schedule report begins weeks based on your locale preferences, regardless of when the Pattern Start Day is.

Example: Different Pattern Start Days

Amanda's preferred locale is configured to begin weeks on Sundays. Logan McNeil configures these patterns on Amanda's work schedule calendar:

Week	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1		8:00 AM - 5:00 PM		8:00 AM - 5:00 PM		8:00 AM - 5:00 PM	
2			24-Hour Shift	24-Hour Shift	24-Hour Shift		

If the Pattern Start Day is a Sunday or Monday, this is what Amanda sees when she views the My Schedule report:

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	8:00 AM - 5:00 PM		8:00 AM - 5:00 PM		8:00 AM - 5:00 PM	
		All Day	All Day	All Day		
	8:00 AM - 5:00 PM		8:00 AM - 5:00 PM		8:00 AM - 5:00 PM	
		All Day	All Day	All Day		

If Logan McNeil changes the Pattern Start Date so that the Pattern Start Day is Wednesday, this is what Amanda sees when she views the My Schedule report:

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		All Day	8:00 AM - 5:00 PM		8:00 AM - 5:00 PM	
	8:00 AM - 5:00 PM		All Day	All Day		
		All Day	8:00 AM - 5:00 PM		8:00 AM - 5:00 PM	
	8:00 AM - 5:00 PM		All Day	All Day		

Each pattern begins on a Wednesday and ends on a Tuesday. In the first pattern, Amanda is scheduled to work on Wednesday, Friday, and Monday. In the second pattern, Amanda is scheduled to work on Wednesday, Thursday, and Tuesday. On Tuesday of the first week, Amanda is scheduled to work *All Day* because the second pattern ends that day and the first pattern begins on Wednesday.

Related Information

Reference

The Next Level: Overview of Scheduling

The Next Level: A Deep Dive into Calendar Scheduling

Concept: Self-Service Changes to Work Schedules

Workers assigned to work schedule calendars that use schedule patterns of less than 2 weeks can use the My Schedule report to edit their own schedules.

Making Self-Service Changes

You can configure the extent to which workers can edit their own schedules on the Create Work Schedule Calendar task.

Self-service workers can select a day on their work schedules to access the Edit My Schedule dialog and make a change that is effective on that date. They can add an End Date to limit the change or leave the field blank to make the change recurring. Workers can only modify present or future dates; they can't modify scheduled days in the past.

If workers leave the field blank, their recurring change will override all other work schedule assignments, including their default assignment and any new assignments. You can manually add end dates to recurring work schedule changes in mass using the Mass Update My Schedule Assignments Without End Date task.

The Edit Days Individually dialog enables workers to make changes that are specific to different days of the week in the schedule patterns.

Note:

To exit the Edit My Schedule dialog or the Edit Days Individually dialog without making any changes, always click Cancel instead of OK. Clicking OK overwrites everything on your schedule with the details on the dialog.

If you unintentionally change your schedule, you can't undo the change but you can try to restore your schedule. To restore your schedule, reenter your start, end, and meal times on your default work schedule calendar and add back in any ad hoc, one-time, or other recurring changes.

Example: Audrey's Summer Work Schedule

Audrey is scheduled to work every weekday from 8:00 AM to 5:00 PM. Starting in July, she needs to come in to work earlier and leave earlier every day. Audrey uses the Edit My Schedule dialog to change her daily schedule to 7:30 AM to 3:00 PM effective on July 1, with no end date.

For the month of July she also needs to leave early on Fridays, at 1:00 PM, so she uses the Edit Days Individually dialog to make the change effective on July 1 and ending on July 31.

Her manager schedules everyone on his team, including Audrey, time to attend a company meeting on the first Friday in July, from 9:00 AM to 12:00 PM. He also assigns her a new work schedule for the last week of July, where she works from 6:00 AM to 2:00 PM. However, Audrey has a recurring change in effect (7:30 AM to 3:30 PM) that takes precedence over her new schedule assignment, so she must manually edit the last week of her schedule for July to match the work schedule assigned to her for that week.

As a result, this is what her schedule for July looks like:

Monday	Tuesday	Wednesday	Thursday	Friday
June 27	June 28	June 29	June 30	9:00 AM - 12:00 PM
7:30 AM - 3:00 PM	7:30 AM - 3:00 PM	7:30 AM - 3:00 PM	7:30 AM - 3:00 PM	7:30 AM - 1:00 PM
7:30 AM - 3:00 PM	7:30 AM - 3:00 PM	7:30 AM - 3:00 PM	7:30 AM - 3:00 PM	7:30 AM - 1:00 PM
7:30 AM - 3:00 PM	7:30 AM - 3:00 PM	7:30 AM - 3:00 PM	7:30 AM - 3:00 PM	7:30 AM - 1:00 PM
6:00 AM - 2:00 PM	6:00 AM - 2:00 PM	6:00 AM - 2:00 PM	6:00 AM - 2:00 PM	7:30 AM - 1:00 PM

Related Information

Tasks

Create Work Schedule Calendars on page 461

Reference

Reference: Work Schedule Calendar Assignment Precedence on page 481

Concept: Importing Work Schedules

You can use the *Import Ad Hoc Schedules* web service to import schedules from a third-party scheduling vendor into Workday Time Tracking. Workday validates the imported data before the web service operation accepts it. Once it accepts the data, Workday translates work schedule events with start and end times into new schedule blocks. These schedule blocks don't affect workers' work schedule calendars, but you can view them on these reports:

- My Team's Schedule.
- My Schedule (for self-service workers).
- View Schedule for Worker.

You can enable Workday to retrieve related attributes from imported schedule events. When workers check in using the Check In or Add Clock Event tasks, Workday can automatically populate the time entry code, position, and worktags using the data imported from the third-party scheduling system.

The Auto-fill from Schedule time entry option displays imported schedule blocks.

To use this web service, set up the *Process: Ad Hoc Schedule Processing* security domain.

Schedule Attributes

Consider these details as you prepare data for import:

Field	Notes
Row ID	A unique numerical value for a schedule contained in a row or set of rows. All data on rows with the same Row ID refer to the same schedule.
Ad Hoc Schedule ID and Meal ID	Workday requires a unique schedule ID for each schedule event. Don't use these Workday-reserved ID prefixes: • AD_HOC_SCHEDULE_EVENT • SCHEDULING_NON_WORK_TIME

Field	Notes
Position ID	Enter the Position ID for workers with multiple positions.
Schedule End Date Time	Scheduled shifts must be fewer than 24 hours.
Meal ID	Scheduled shifts must not include more than 2 unpaid meal periods.
Time Type	If the Time Code Reference ID is Time Type, you must use an In/Out time entry code with a unit of hours. Workday requires In/Out time entry codes because the web service uses start and end times to determine shifts. If you don't enter a time entry code, Workday uses the default time entry code from the worker's time entry template.

Updating and Deleting Imported Data

You can update or delete imported schedule blocks by using the *Import Ad Hoc Schedules* web service. When you import update transactions, Workday replaces the existing details on the schedule block with the details of the new block. Include all the details you want to preserve in addition to the updated fields.

You can only edit imported schedule blocks by completing another import. Updates you make through the web service take precedence over any other edits you complete in other reports or tasks. Example: A manager using the My Team's Schedule report can't update schedule blocks created using the *Import Ad Hoc Schedules* web service. You can delete a schedule block by setting the Delete_Schedule field to True.

Related Information

Tasks

Set Up Third-Party Scheduling

Reference

The Next Level: A Deep Dive into Calendar Scheduling

Reference: Work Schedule Calendar Assignment Precedence

When multiple work schedule changes affect the same date, Workday prioritizes the changes in this order to determine the schedule for that date:

Order	Assignment
1	Ad hoc changes that the worker's manager makes using the My Team's Schedulereport.
2	One-time changes that the worker makes.
3	Recurring changes that the worker makes.
4	New work schedule calendar assignments.
5	Workers' default work schedule calendar assignments and any changes an administrator makes to those calendars.

You can use the Eligibility Calendar tab on the View Worker's Time Eligibility report to view the current schedule assignments for a worker. You can also view a history of their work schedule assignments over a time period.

Related Information

Concepts

Concept: Self-Service Changes to Work Schedules on page 479

Tasks

Manage Ad Hoc Work Schedule Changes on page 473

Manually Assign Work Schedule Calendars on page 472

Reference

Reference: Time Tracking Eligibility Reports

Tenant Branding

Steps: Set Up Tenant Branding

Prerequisites

Security: *Set Up: Tenant Setup - System* domain in the System functional area.

Context

You can brand your Workday tenant with custom images and color to reflect your organization and provide a more modern and consistent brand experience.

Brand Setting	Where used...
Logo image	Global header
Banner image	Home banner
General Color • Canvas Color Picker • Hex Color Picker (not available on Mobile)	• Hubs navigation • Cards • Task page header • ConnectR • Profile • Global navigation icons
Primary Button Color • Canvas Color Picker • Hex Color Picker	Applies to most pages, with the exception of sign-on / sign-out pages and native mobile applications.

Note: The primary button color serves as a base from which Workday automatically generates lighter and darker shades for various button states. If the selected base color is too light or too dark, Workday will slightly adjust it to ensure that accessible lighter and darker shades can be derived.

Steps

1. Access the Edit Tenant Setup - System task.

   You can change your sign on screen, including the background, logo, and message. Under System Setup, you can configure the Signon Formal Note, Signon Custom Message, and the Signon Tenant Logo (PNG and JPG files recommended), among other settings. See: Reference: Edit Tenant Setup - System on page 164.
2. (Optional) Access the Create Branding Rule task.

   Create branding condition rules and apply 1 to each image. You can set condition rules that determine which image displays for specific groups of users.

3. Access the Configure Tenant Branding task.

   Upload branding logos and banners and apply condition rules to them as needed. Select a Branding Color to display on the Home page, headers across Workday, Recruiting Hub, and the sidebar of worker profiles. Configure a custom color for primary buttons throughout the user interface to align with your corporate branding. You can set different branding rules for Mobile and Desktop.

Result

Workday applies the branding configuration the next time users sign in.

Related Information

Tasks

Create Business Process Condition Rules on page 1011

Reference: Recommended Image Sizes for Tenant Branding

You can use the Configure Tenant Branding task to brand your Workday tenant with custom images that reflect your organization. You can't add alt text to banner images. Workday recommends JPEG or PNG images in these pixel sizes:

Image Type	Size
Branding Banner	1440 x 193 (for the Workday Home page) As you select an image, consider that Workday crops the branding banner to fit different screen resolutions. You might need to adjust or strategically select your image for best display on the screen resolution most users have. You can also try for larger screen sizes: • 1920 x 193 For users on any browser or iPad, Workday displays the banner on Workday Home page.
Branding Logo	194 x 78 Workday recommends SVG images for branding logos. Images might seem blurry in the image cropping tool. On iPad and desktop, Workday displays the logo on the application header.
Small Branding Banner	Workday displays the small branding banner on Workday Home page on iOS and Android devices. As you select an image, consider that Workday crops the banner to fit different screen sizes, and that other elements on the page may partially overlay the top or bottom of the image. For best results, Workday recommends: • 3:1 aspect ratio. • 1023 X342 or 1920 X 640 resolution. • Simple images without text.
Small Branding Logo	100 x 100 Workday doesn't support SVG images for small branding logos.

Image Type	Size
	On Android and iPhone, Workday displays the logo on the application header.

Related Information

Tasks

Add Home and Dashboard Announcements on page 312

Reference

Workday Corporate Brand Guidelines

Branding Color Guidelines

Custom Objects and Labels

Steps: Set Up Custom Objects

Prerequisites

Security: *Custom Object Management* domain in the System functional area.

Context

Custom objects are business objects that you create to capture data that's unique to your organization. You can configure security domains for custom objects, and you can use custom objects in business processes and reports. A custom object is a set of custom fields that you can configure to suit your environment. Custom objects enable you to record additional data for which there's no Workday-delivered field.

You can create custom objects with up to 200 active custom fields. Inactive custom fields don't count toward that limit.

Note: When you have more than 100 custom fields for an effective-dated business object, some fields might be truncated when you view them in an approval step. To avoid truncated fields, configure multiple approval steps or create a separate business process using Workday Extend.

Steps

1. Create and Edit Custom Object Definitions on page 485.
2. Access the Create Custom Object Condition Rule task to define condition rules for custom object validations.

   Enter the rule in the Source External Field or Condition Rule field. The rule can be any Workday-delivered field on the extended Workday business object or any custom field on the custom object. You must activate a new custom field on the extended business object to use a rule in a custom validation.

3. Access the Create Custom Field Type task.
    a. Select the custom field type.
    b. Enter a unique Custom Field Type Name.

       You can always edit the name of a custom field type, but you can't change the field type after the custom field is used.
    c. Enter a unique Web Service Alias.

       Workday uses the alias to refer to the custom object in web services. Enter a valid XML element that:

       - Includes alphanumeric characters only.
       - Starts with a character that isn't a number or punctuation.
       - Doesn't contain spaces or special characters.

       Once the field type is in use, you can't modify the web service alias.
4. (Optional) Create Custom Lists on page 491.
5. (Optional) Create Custom Labels on page 492.
6. Create Custom Object Validations on page 493.
7. (Optional) Add a UI Visibility Rule.
    a. Select Custom Object > Edit > OK from the related actions menu of your custom object.
    b. On the Edit Custom Field task, select a rule from the UI Visibility Rule prompt. If no condition rules are available, create one for your custom object.

Next Steps
View or modify additional data for:

- An effective-dated custom object that extends an effective-dated Workday object. From the related action menu of the custom object select either:
    - Additional Data > View All As Of to view.
    - Additional Data > Edit All As Of to modify.

  Note: For each effective-dated custom object that extends an effective-dated Workday object, complete an *Edit Additional Data* step on *Edit Additional Data* business process.
- A noneffective-dated custom object. From the related action menu of the custom object select either:
    - Additional Data > View All to view.
    - Additional Data > Edit to modify.

Related Information
Concepts
Concept: Custom Objects
../../business-processes/business-process-step-types/dan1370796495090.dita
Reference
Community: Custom Objects (Non-Effective Dated) EIB - Inbound

Create and Edit Custom Object Definitions

Prerequisites

Security: *Custom Object Management* domain in the System functional area.

Context

You can extend Workday business objects by creating custom object definitions based on the business object and adding custom fields.

Steps

1. Access the Create Custom Object or Edit Custom Object task.
2. As you complete the task, consider:

Option	Description
Custom Object Name	To avoid errors when you generate an Enterprise Interface Builder (EIB) template for the custom object, don't use special characters.
Effective Dated	To edit custom object data for a Workday object while a business process is in progress, base the custom object on an *Effective Dated* Workday object. All effective-dated custom objects share the same set of effective dates. When you update any effective-dated custom object, Workday copies the data for all effective-dated custom objects from the previous effective date to the new effective date. To avoid obsolete or missing data when you update custom objects out of sequence, add or update custom objects in ascending effective-date order.
Business Object Filter	When you create a custom object for a custom organization, select a custom organization type from the Business Object Filter prompt. The Business Object Filter prompt is only available when you select a Custom Organization. When you create the custom object, it's available to all custom organizations of the same type. You can't reassign the custom object to a different custom organization type after you create it. Custom field limits apply across all custom organizations, not to each custom organization type.

3. As you complete the General Settings section, consider:

Option	Description
Web Service Alias	You can only edit this field on a draft custom object. You can't change the web service alias after you activate the custom object definition.
Allow Multiple Instances per Object?	You can only edit this field on a draft custom object. You can't change this setting after you activate the custom object definition.

4. As you complete the Field Definitions section, consider:

Option	Description
Field Label	Workday uses the Field Label as the report field name when you use this custom field in custom reports or calculated fields.

Option	Description
Field Type	Workday can share custom field types across all custom objects. You can only edit the field type on a draft custom field. You can't change the field type after you activate the custom field.
Validations	You can't change whether a custom field is a required field after you activate it. Custom fields used as a reference ID require a value whether or not you make the field required. Workday recommends that custom fields that you use as reference IDs be required fields. When the Field Type is *Custom List* or *Custom Instance Reference*, you can select *Multi-Instance* or *Single-Instance*. By default, custom list fields are single-select, unless you select *Multi-Instance*.
Display Order	When multiple custom fields have the same Display Order, Workday uses the Field Label to determine the order.
Proposed New Fields	You can add additional fields. Note: Use caution before you add required fields when you have either: • Existing data for an effective-dated custom object. • More than 1 effective-dated custom object definition for the business object. Workday stores data for all custom objects on the same snapshot. When a new effective-dated snapshot is created, Workday copies data from the previous snapshot as a starting point. You can't save the new snapshot when the new required field is empty on the new snapshot. Workday strongly recommends that you mass update existing custom data to populate a value in the new required field. When you're editing an active custom object, Workday saves the Proposed New Fields, but doesn't activate them until you complete the task.
Removed (Inactive) Fields	When you remove a custom field: • Workday appends the Do Not Use label to the custom field. • Workday retains custom data, but you can't edit it. • You can't select the custom field in calculated fields, report fields, condition rules, and integrations.

Option	Description
	You can restore a removed field if it doesn't exceed the custom field limit for the business object.

5. As you complete the Details section, consider:

Option	Description
Category	Select categories for custom reports and calculated fields.
Authorized Usage	Workday enables you to restrict the areas where the custom field displays. Example: If you select Integrations, the custom field is only visible in integrations.
Prompts	Only available when you have a field type of *Custom Instance Reference*.

6. (Optional) Add Permissions for custom object security domains.

   To select a custom domain, it must have an active security policy with at least 1 security group defined.

7. As you complete the activation, consider:

Option	Description
Display Value	Available when you select Allow Multiple Instances per Object. Enter the custom field that you want to display when you specify this custom object as a field in a custom report. You can't remove the custom field that you select as the Display Value.
Reference ID	When you select Allow Multiple Instances per Object, select a *Date*, *Integer*, or *Text* type custom field to represent the key for each instance of custom data in the multiple-instance custom object. To display multiple-instance custom objects in the EIB prompt, define a Reference ID before activating the custom object. The custom field must have a unique value for each instance of the Workday object so that it's identifiable in custom reporting and REST API updates. When you set a custom field as the Reference ID for a multiple-instance custom object, Workday makes that field required. Workday recommends that you select a required custom field because you can't change this validation after you activate the custom object. You can't: • Use the *Custom Paragraph Text* field type for a Reference ID.

Option	Description
	• Add or change the Reference ID after you activate the custom object. • Remove the custom field that you select as the Reference ID.
Help Text for Custom Object Edit	Enter help text to display on the Edit Additional Data task.

Next Steps

Enter data for an effective-dated or non effective-dated custom object.

Optionally, you can:

- Add additional data to an active custom object.
- Edit any field for a draft custom object and its custom fields using the Edit Custom Object task.
- View custom object details by running the Custom Object Definitions report.
- Compare or correct custom data across multiple effective dates using the View Out of Order Custom Object Changes task.

Also, when the Workday object supports profile groups, you can enter custom data on the Additional Data tab of the Workday object.

Related Information
Concepts
Concept: Custom Fields in Custom Reports and Calculated Fields on page 496
Concept: Updating Effective-Dated Custom Object Data on page 498
Tasks
Create Custom Object Validations on page 493
Create and Activate Custom Project Fields
Customize Project Type and Contract Layouts
Steps: Add Custom Fields to Contracts and Projects
Reference
Reference: Custom Object and Field Limits on page 505
Examples
Example: Add Custom Fields to Job Requisitions

Create Custom Instance References

Prerequisites

Security: *Custom Object Management* domain in the System functional area.

Context

You can create custom fields that reference instances automatically.

You can only create custom fields that refer to instances of the Worker business object. You can't use inbound EIBs to load data into noneffective-dated custom objects that contain custom instance references.

Steps

1. Access the Create Custom Object task.
2. Add a custom object field.
3. In the Field Definitions section, enter a custom field label.

4. From Field Type, select Custom Instance Reference > Worker Reference.
5. (Optional) Select Validations. If you don't select a validation, the field is multi-instance.
6. (Optional) Set the Display Order.
7. Expand Details.
   a) Enter a unique Web Service Alias.

      Workday uses the alias to refer to the custom object in web services. Enter a valid XML element that:

      - Includes alphanumeric characters only.
      - Starts with a character that isn't a number or punctuation.
      - Doesn't contain spaces or special characters. Example: `/`.

      Once the field type is in use, you can't modify the web service alias.
   b) Set the Category.

      Defines which category the custom field belongs to in a prompt.
   c) Set the Authorized Usage.
   d) Set the Prompts for workers.

      The prompts only display instances of workers that you have permission to view. You can search for a worker outside of the selected prompts, when you don't select a prompt and the only worker displayed is yourself.
8. Add security domains in the Permissions section.

Create Custom Field Types

Prerequisites

Security: *Custom Object Management* domain in System functional area.

Context

Create a custom field type from the list below. Use the new type to define a custom field by extending a business object. For an example scenario, see Example: Add Custom Fields to Job Requisitions.

Steps

1. Access the Create Custom Field Type report.
2. Select the custom field type.
3. Enter a unique Custom Field Type Name.

   You can always edit the name of a custom field type, but you can't change the field type after the custom field is in use.
4. Enter a unique Web Service Alias.

   Workday uses the alias to refer to the custom object in web services. Enter a valid XML element that:

   - Includes alphanumeric characters only.
   - Starts with a character that isn't a number or punctuation.
   - Doesn't contain spaces or special characters. Example: `/`.

   Once the field type is in use, you can't modify the web service alias.
5. (Optional) Enter the minimum, maximum, and precision values for numbers.

   Values must be valid. Otherwise, Workday displays an error message with the valid values.

   You can change the minimum and maximum values of a custom field type that isn't already in use.

Next Steps

Use the custom field type to define a custom field in an extendable Workday business object.

From the View Custom Field Types report, you can:

- View the properties of custom field types.
    - Select Custom Type > Edit from the related actions menu to edit the custom field type.

Create Custom Lists

Prerequisites

Security: *Custom Object Management* domain in the System functional area.

Context

Create a List custom field type to use in your custom fields.

Steps

1. Access the Create Custom List task.
2. As you complete the task, consider:

Option	Description
Custom Field Type Name	The name that Workday displays in the Custom Field Name prompt on the custom object definition.
Web Service Alias	The web service alias for the overall use of the custom list. It uniquely identifies the list in an integration. You can also define a web service alias for each List Values grid row. Workday uses the alias to refer to the custom object in web services. Enter a valid XML element that: • Includes alphanumeric characters only. • Starts with a character that isn't a number or punctuation. • Doesn't contain spaces or special characters. Example: `/`. Once the field type is in use, you can't modify the web service alias.
Inactive	You can inactivate the custom list if it isn't in use by a custom field.
List Values	• For each list value in the grid, you can enter a unique List Value Name. • When you use a Web Service Alias for List Values, you must have a web service alias for the custom list type. • You can Inactivate each list value without affecting existing data. Users can still view inactive list values, but they

Option	Description
	can't select them. You can reactivate list values.

Next Steps

Use the Edit Custom List task to change custom lists. You can:

- Add new values up to a total of 10,000 custom list items.
- Modify the name of the list.
- Modify the list value names.

Use the Translate Business Object report to translate custom lists.

Related Information

Concepts

Concept: Custom Objects in Workday Web Services

Tasks

Create Conditional Lists for Custom Fields

Create Custom Dimensions and Custom Account Posting Rule Types

Examples

Example: Edit Worker Additional Data using WWS

Create Custom Labels

Prerequisites

Security: *Custom Label Management* domain in System functional area. Requires *Modify* permission.

Context

You can replace some default Workday labels with your custom labels. For example, Workday doesn't display custom labels in security or integrations features.

Custom labels are available in English and some supported languages. Workday displays the original translations for other languages but you can override those labels with your own non-English custom labels.

Steps

1. Access the Maintain Custom Labels task.
2. Select the Term Context (functional area) for the default term.
3. Enter the Override Value for singular, plural, and possessive term.
4. (Optional) To set the custom label case, select Preserve Case.

   Example: UPPERCASE, lowercase, or initial caps. The default is to capitalize the override label to match the original label. When you override a single word default value with a multiple word override value, the default capitalization is initial caps.

Result

Workday displays the custom labels. If you don't see your custom labels take effect immediately, sign out and back in again. You can revert back to the Workday default label by selecting the Disabled check box for the term on the Maintain Custom Labels task.

Workday might continue to display the original terms for task and report names. Example: You have a custom report named *Custom Report for Contingent Workers*. Creating a custom label for the term *Contingent Workers* doesn't change the report name. However, you can rename the report.

Next Steps

Access the Rebuild Search Index task to manually rebuild the search index so that Workday includes your custom labels in search results. Workday recommends that you wait for the Friday server restart, when indexes rebuild automatically.

Related Information
Tasks
Steps: Set Up Non-English Custom Labels on page 353

Create Custom Object Validations

Prerequisites

- Define condition rules for custom object validations.
- Security: *Custom Object Management* domain in the System functional area.

Context

You can create or edit custom validations for custom fields to ensure that your data is valid.

Workday Web Services don't enforce custom validations on custom object data that you upload using:

- Workday-delivered integrations.
- Workday Studio.

Steps

1. Access the Configure Custom Object Validations task.
2. Select an active or draft Custom Object from the Custom Object prompt.
3. As you complete the task, consider:

Option	Description
Message	Enter text that displays when workers enter invalid data.
Rule	Select a condition rule to validate the data. When you create custom object validation rules on an effective-dated business object, you can only directly reference fields on an extended Workday object when the business process: • Uses that Workday object. • Won’t change that Workday object. When you reference fields that the business process uses, the validation rules evaluate data while the business process is in progress. When you need a custom object validation to reference a field on the extended Workday object, determine if the field is available on the Workday object that the business process uses. When it's not available, create a calculated field on that business process

Option	Description
	object. Use the *Lookup Related Value* calculated field on the Create Calculated Field task to display that field on the business process object. You can then use this calculated field in the custom object validation rule. Workday determines the current value of the calculated field when it runs the validation rule. The value isn't part of the business process.
Evaluate only on 'OK'	Select to evaluate the custom validation when you submit the task rather than when you move out of the custom field.

Result

When workers create or update custom object additional data, Workday evaluates the custom validation rules to:

- Alert transaction approvers to conditions that need more careful review.
- Display warning or error messages when workers create a transaction that doesn't meet the conditions for the validation.
- Prevent workers from submitting invalid transactions until they resolve an error.

Delete Custom Data, Fields, or Objects

Prerequisites

Security: *Custom Object Management* domain in System functional area.

Context

Administrators can permanently remove additional data from active custom objects and fields to:

- Prepare a custom object for deletion.
- Create space for new data.

You can delete custom fields that you no longer need or when you've reached the active custom field limit. Before you delete a custom field, you must verify that:

- No integrations use the custom field.
- There's no data in the custom object definition.

Deleting a custom object might break the integration, so you must verify that no integrations are using the custom object. You can't restore a custom object once you delete it. You can't delete a custom object when:

- Data exists for any of its custom fields.
- One of its custom fields is configured as the Reference ID and data existed for any of its custom fields.
- A calculated field, condition rule, or custom report is using any of its custom fields.

Steps

1. Delete custom object data.
    a. Access the Delete Custom Object Additional Data task.
    b. Select the Custom Object. When you want to add or modify an effective-dated custom object, you must access the object using the business process. You can't delete additional data from an effective-dated custom object.
    c. (Optional) Select the Condition Rule for deleting the custom object additional data. When you leave the field blank, Workday deletes all custom object additional data.

        You can set up condition rules on the Create Custom Object Condition Rule task.

        You can't restore custom object additional data after you delete it. A background process permanently removes data for the custom object but doesn't purge it. The data remains in the audit history. You can view the *Delete Additional Data* event in the audit history of the primary Workday Object instance for the custom object.
2. (Optional) Delete custom fields.
    •

    Use one of these options to delete custom fields:

    - Remove all usages of the custom field from a custom object by accessing the Edit Custom Object report.
    - Access the Delete Custom Field task.
3. (Optional) Delete custom objects.
    •

    To delete a custom object:

    a. Remove all custom fields from a custom object by accessing the Edit Custom Object task.
    b. Access the Delete Custom Object task. Select the object to delete.

Related Information
Concepts
Concept: Edit Additional Data Step on page 980

Create a Custom Report on a Supplier Object

Prerequisites

Security: *Custom Object Management* domain in the System functional area.

Context

When you create a custom report on the Supplier object where the primary business object of the data source is Resource Provider, you must use calculated fields to add custom fields in custom objects for the Supplier in your report.

Steps

1. Create an advanced custom report on the *Suppliers* report data source.
2. Create a new report calculated field by selecting Create > Create Calculated Field for Report as a related action on the report.
3. Enter a Field Name for the custom field to include in the report.
4. Select *Supplier* from the Business Object prompt, and *Lookup Related Value* from the Function prompt.
5. Select *Supplier that is not a Contingent Worker* from the Lookup Field prompt.
6. From the Return Value prompt, select a custom field from the *Custom Fields* category.

7. (Optional) Repeat the steps to add additional custom fields to your report.

Display Additional Data in Profiles

Prerequisites

- Create your custom object definitions.
- Security: *Set Up: System* domain in the System functional area.

Context

You can configure the Additional Data tab to display custom object data on profile groups on a Workday profile to view the data in context.

The custom objects that you can view on a profile depend on:

- The security policy of the objects and the profile.
- The view permissions of their security domains.
- The Display Option configuration on the Create Custom Object task.

Steps

1. Access the Configure Profile Group task.
2. Add a row, then select Additional Data.

   The Additional Data tab contains the custom objects added to the profile group.

   Example: Select Worker Profile > Overview for Worker Profile. Workday displays the Additional Data as a tab on the Overview profile group on worker profiles.

Related Information
Tasks
Create and Edit Custom Object Definitions on page 485
Steps: Set Up Profiles and Profile Groups on page 321

Concept: Custom Fields in Custom Reports and Calculated Fields

Create a Custom Report

You create custom reports with custom fields in a similar way to creating custom reports with other Workday fields. You can create calculated fields based on custom fields.

You can use a custom field in reports:

- As a column, if the *business object* is an extended business object.
- As a prompt.
- To define a filter.
- To sort or group.

Note: We recommend that you don't use custom fields as a dimension to aggregate data or as a report prompt to filter data because doing so can adversely affect performance, especially when custom fields evaluate a high volume of data.

Workday doesn't index custom fields. Therefore, when you use custom fields to filter or group data on a high-volume business object, the report will run slowly. Example: You have more than 50,000 workers and you use a custom field on a custom object on the Worker business object to filter or group workers, the report could run for several minutes.

When you create a custom field, you select or create categories for the custom field. The default category is Custom Fields, but you can assign custom fields to any existing or new category.

To enable users to select a custom list value in the prompt, you can create or predefine filters. In both scenarios, the prompt displays custom list items that are specific to that custom list. Example: You create a custom field called My Certifications with a custom list type of Worker Certifications. You also create a filter on My Certifications. The prompt displays the custom list items.

You can use custom fields in calculated fields and condition rules. Condition rules that can use calculated fields can also use custom field data in their rule definitions. The rules include business process condition rules.

Calculated fields can reference custom fields, just like other fields from the owning business object.

Fields in a multi-instance custom object or a custom object that extends an effective-dated business object aren't in the primary business object for the report:

To report on fields in a...	Then...
Multi-instance custom object.	Select the custom object in the Business Object column of the report definition.
Single-instance custom object that extends an effective-dated business object.	Select Additional Data in the Business Object column of the report definition. You select custom fields in single-instance custom objects that extend an effective-dated business object from the Field Name column.
Multi-instance custom object that extends an effective-dated business object.	Create a Lookup Related Value calculated field related to the Business Object that obtains the Additional Data. The Return Value in the calculated field is the name of the effective-dated custom object. Select this calculated field in the Business Object column of the report definition. Select the custom fields in the Field Name column.

When you create a Lookup Related Value calculated field for multi-instance custom objects that extend an effective-dated business object, use these effective-dated business objects and their related Lookup Fields and business objects:

Effective-Dated Business Object	Lookup Field	Related Business Object
Worker	Worker Additional Data	Worker Custom Data Snapshot
Job Requisition	Job Requisition Additional Data	Job Requisition Custom Data Snapshot
Position Restriction	Position Restriction Additional Data	Position Restriction Custom Data Snapshot
Academic Appointment Track	Academic Appointment Track Additional Data	Academic Appointment Track Custom Data Snapshot

Accessing Custom Fields on Organization in Custom Reports

When the primary business object of your data source is Organization, create calculated fields on the Organization business object to access custom fields on specific organization types in custom reports. This includes custom fields for an organization returned by Lookup Organization. Using the Look Up Related Value function, select the organization type that the custom object is on as the Lookup Field. Select the custom field in the Return Value field. When using a multi-instance custom object, select the custom object in the Return Value field.

Security

Security for custom fields in reports is the same as the security for other Workday report fields. A report creator can access a report definition custom field, even if they don't have View permissions for the custom object and field. However, the report creator can't see any data when they run the report.

Custom objects are secured to domains. When you create a calculated field that references a custom field, the calculated field security considers the custom field security. The calculated field also considers the security of delivered Workday fields that it references.

When a worker runs the report, they can see only the fields in domains to which they have View access. If the report contains a calculated field based on a custom field, the worker can only see the calculated field and values if they have View access to the domain that the custom object is secured to.

Related Information

Concepts

Concept: Custom Reports

Tasks

Create and Edit Custom Object Definitions on page 485

Concept: Updating Effective-Dated Custom Object Data

To update effective-dated custom objects on effective-dated business objects, you can include *Edit Additional Data* steps in any of these business processes:

Business Object	Business Process
Academic Appointment Track	*Add Academic Appointment* *Update Academic Appointment*
Employee Contract	*Edit Employee Contract Additional Data Event* *Employee Contract*
Job Requisition	*Edit Job Requisition Additional Data* *Job Requisition* *Job Requisition Change*
Learning Course	*Manage Course*
Learning Course Offering	*Manage Course Offering*
Learning Program	*Manage Program*
Position Restrictions	*Create Position* *Edit Position Restrictions* *Edit Position Restrictions Additional Data*
Worker	*Change Job* *Contract Contingent Worker* *Edit Worker Additional Data Event* *End Contingent Worker Contract* *Hire* *Termination*

When *Edit Additional Data* is a step within an overall business process, Workday creates event lites under the new event lite type of Custom Object Effective-Dated Change. When an action event contains 1 or more *Edit Additional Data* work flow steps:

- Before the event completes, Workday creates 1 event lite and 1 corresponding transaction log lite with an entry moment that matches the parent event when the event completes, regardless of how many steps you include.
- After the event completes, Workday creates 1 event lite and 1 corresponding transaction log lite with an entry moment of the step when it completes. Post completion *Edit Additional Data* steps have a different entry moment than the parent event.

When you correct an *Edit Additional Data* step, Workday creates 1 event lite entry and a corresponding transaction log lite entry.

Workday creates an event lite in the transaction log when you update effective-dated custom objects using a standalone business process.

When you correct the effective date of a business process event, Workday creates an additional Transaction Log Lite entry with the previous effective date and the entry moment. The original correction entry with the new effective date remains in the transaction log.

To verify or audit the values of Workday custom objects, use the transaction log to find instances of Custom Object Non-Effective-Dated Change - Event Lite Type. The event lite type includes the changed custom object name, the owning instances, and who changed the custom object and when the change occurred. It doesn't include details describing the actual changes to the custom object data.

If you need to retrieve custom object data from Workday for use in an external system, you can query the transaction log for current custom fields values.

Using Business Processes and Custom Objects

Use a business process to edit custom field data on effective-dated custom objects. You can only select custom objects that support effective-dated business objects.

To view or update effective-dated custom objects on a business object outside of staffing business processes, use 1 of these standalone business processes:

- *Edit Employee Contract Additional Data Event*
- *Edit Job Requisition Additional Data*
- *Edit Position Restrictions Additional Data*
- *Edit Worker Additional Data Event*
- *Update Academic Appointment*

Set up an *Edit Additional Data* step for each effective-dated custom object. You can only route this business process step to security groups that have permission to access the selected custom object.

- When you have the required business process security, select Additional Data > Edit Effective-Dated Custom Object from the related actions menu of the Workday object. Enter an effective date. Workday applies the date to all custom objects that you add or update.
- To view the effective-dated custom objects, select Additional Data > View All As Of from the related actions menu of the Workday object.

Note: You can configure step label overrides on *Edit Additional Data* business process steps.

For *Edit Additional Data* steps routed to you:

- You can edit only active custom fields for a custom object.
- When you submit the *Edit Additional Data* step, Workday evaluates any custom object validations. When it detects invalid data, it displays an error message.
- You can only delegate an *Edit Additional Data* step to a member of a security group that has permissions on the security domains that secure the custom object. On the *Edit Additional Data* items in My Task, the delegate can view details of the event by clicking View Details in the gear icon.

Workday skips the *Edit Additional Data* steps when you submit 1 of these business processes through either:

- A web service with auto-complete enabled.
- An EIB using the Automatic Processing option.

You can modify the custom field data while the business process is in progress. To modify the data after the business process is complete, select Business Process > Correct Additional Data from the related actions menu of the business process. To modify data, you must have permissions on the:

- *Correct* action in the business process security policy.
- Security domains that secure the custom object.

Snapshots for Effective-Dated Custom Objects

Individual custom objects don't have separate snapshots. Workday stores the data for all custom objects for a business object on the same snapshot. When a new effective-dated snapshot is created, Workday copies the data from the previous snapshot as a starting point. Workday copies the data for all custom objects even when the custom object has a step in the business process that creates a new effective-dated snapshot.

When a later-dated effective date for custom data exists, your changes aren’t carried forward to it. Make the same changes for every subsequent effective date. When Workday displays an alert warning you of a later-dated effective date, apply the same changes to the effective date indicated in the alert.

When a business process event invokes an *Edit Additional Data* step, Workday creates an effective dated snapshot. When multiple business processes that update custom data are in process at the same time for the same business object, some changes might be lost if these are in conflict:

- Event effective dates.
- Snapshot creation time.
- Event completion order.

When you rescind any *Edit Additional Data* events, ensure that custom data is restored correctly by rescinding the events in reverse effective-date order. Example:

1. Rescind the latest effective date first, including future-dated events.
2. Rescind subsequent events that updated 1 or more custom objects from the latest date backwards.
3. If any events completed with an out-of-order effective date, reapply updates to custom data after all the events back to the latest effective date are rescinded.

The value of an inactive or removed field remains in existing snapshots, but the value is not copied to new snapshots and will not be visible on a new snapshot. Note that a new snapshot can be created by a different business process that updates the custom objects.

Use the View Out of Order Custom Object Changes task to:

- Compare custom data across multiple effective dates.
- Identify effective dates added or updated when a later effective date with custom data already exists.
- Update incorrect custom data by using the links provided in the grid.
- View custom data for out-of-order effective-dates.

The View Out of Order Custom Object Changes task is secured to the *System Auditing* domain, but you must also have view access for the domains that secure the custom objects to see the details when you click the links in the grid. Details for custom objects that you don't have view access to won't be visible.

Concept: Security for Custom Objects

Custom Objects and Security Domains

The *Custom Object Management* security domain secures custom object administration. This domain contains users and groups that can view and modify Custom Object definitions.

Manage security for custom objects and fields at the custom object level. Custom fields for a custom object inherit the custom object security.

Define the security policy on a custom object using domains for the security policies. The union of all View, Modify, and Integration custom object domain permissions control access to the tasks for the custom object and associated fields.

REST API Security for Custom Objects

When you create a custom object, specify the security domain. To view the security domains for a custom object, use the View Custom Object report. When registering your API client, verify that the selected Scope (the Functional Area) includes security domains for the custom objects.

Permissions Affecting Custom Objects

View permissions on security domains control whether you can view:

- Business objects that support profile groups and custom fields. Custom fields that are available on the Additional Data profile tab include: academic unit, academic unit hierarchy, job application, job profile, job requisition, position restriction, and worker profiles. To add the profile tab, use the Configure Profile Group task.
- Custom fields in a report.
- Custom object data as a related action on extended business objects.

Modify permissions control editing custom object data as a related action on an extended business object. Example: Worker object.

Integration permissions control whether an integration can get or put data, independent of the Workday integration tool you're using. Your ability to create an integration is independent of the custom object integration domain permissions.

Example: An Integration Partner can create and run an inbound Enterprise Interface Builder (EIB) that includes custom fields that the Integration Partner can access. However, the inbound EIB updates values *only* for:

- Custom fields for which the worker has Put access.
- Workers in organizations that the worker has access through an Integration System Security Group (Constrained).

To view the security policy on a custom object, select as Security > View Security a related action on the custom object. When you view a security domain, Workday displays a Custom Objects section if any custom objects are secured to that domain. To view the associated custom fields, select the custom object.

Custom Objects and Security Groups

Types of security groups:

Security Group	Description
Role-based (constrained)	All users in the security group have access to a subset of data instances (rows) that the security group can access.
Role-based (unconstrained)	All users in the security group have access to all data instances secured by the security group.
User-based	Primarily for Administrative users. Add a worker directly to the group. The worker can't inherit membership in the group. All users in the security group have access to all data instances secured by the security group.

Result of assigning a security group to a custom domain:

Assignment	Result
Role-based group (constrained) to a custom domain.	Assignee can't view or edit custom object data.
Role-based group (unconstrained) or user-based group to a custom domain.	Assignee can view and edit custom object data.

When you assign a role, ensure the:

- Role for the custom object security group is enabled for the domain.

- Users to grant access are assigned the role, or have inherited the role for the domain.

For a custom domain, the type of custom object to be secured is unknown. Therefore, Workday can't restrict the domain to enforce a role-based group type. Set the role-based group type.

Using a role-based group (constrained) is valid if the business object is contextually secured. Example: Cost Center is contextually secured. However, other extensible custom objects aren't. Example: Job Profile. Using a role-based (constrained) security group of HR Partner to control access to Job Profile custom objects is invalid.

A role-based group (constrained) evaluates security using the target object. A role-based group (unconstrained) doesn't evaluate security. Example: If a worker has the role HR Partner for any organization, then they're a member of the HR Partner role-based group (unconstrained).

Custom Object Management and Reporting Tasks

- Security Analysis for Securable Item and Account
- Security Analysis for Workday Account
- View Security for Calculated Field
- View Security for Securable Item

Concept: Custom Objects in Integrations

Custom Objects in REST APIs

The Workday REST API supports single- and multi-instance custom objects. The custom object and its attributes pass through when you add or update single- or multi-instance custom object data using these APIs.

Workday REST API doesn't support effective-dated custom objects. To update an effective-dated custom object, use SOAP APIs.

Custom Validations for Custom Objects in Integrations

Workday Web Services don't support custom validations. Workday doesn't enforce custom validations when you add or update custom object data using these APIs:

- Workday Studio.
- Workday-delivered integrations.

Enterprise Interface Builder Spreadsheets

The EIB integration tool enables you to load and update custom object and field data (but not definitions) using inbound custom object EIB spreadsheets.

You can't load custom object data using a web service EIB spreadsheet.

You can't use an inbound custom object EIB spreadsheet to:

- Load data into noneffective-dated custom objects that contain custom instance reference fields.
- Load custom object data if the custom object definition extends effective-dated business objects.
- Add new custom object definitions.
- Update existing custom object definitions.
- Delete custom object definitions.
- Add *{empty}* to a custom field cell to delete the cell contents.
- Load standard Workday data.

When you upload a custom object EIB spreadsheet, you can't use the *Load Error Limit*, *Add Only*, and *Validate Only* options.

Workday creates an event lite in the transaction log when you use EIB to load data for a custom object that isn't effective dated on the Worker business object.

When you load multi-instance custom objects, ensure values in the custom field used as the Reference ID are unique. Subsequent rows in the EIB with duplicate Reference ID values overwrite previous rows.

When a multi-instance custom object doesn't display in the EIB prompt, access the Edit Custom Object task and check if there's a specified Reference ID. When there's no specified Reference ID, you can't create a custom object spreadsheet template to load data for the multi-instance custom object. You can't add or update the Reference ID if the custom object has data.

In the Format row of an EIB spreadsheet, Workday displays these restrictions for the custom field data. Ensure that the data you enter in the cells conforms to the format.

Custom Field Type	Format
Currencies	*total_digits.fraction_digit* *total_digits* is the maximum number of digits before the decimal. *fraction_digit* is the maximum number of digits after the decimal.
Decimals	*total_digits.fraction_digit*
Integers	*Integer (N, nn)* *N* is the minimum value. *nn* is the maximum value.
Paragraph Text	*Text (nn)* *nn* is the maximum number of characters.
Text	*Text (nn)*

Outbound Connectors

You can use custom fields with outbound Connectors for which you enable Document Field Overrides. You can export the current value of a custom object, not the preceding value.

Reports as a Service Support

When you configure custom reports with custom objects and fields, you can use Reports as a Service (RaaS) to retrieve data using a REST web service.

Related Information

Concepts

Concept: EIB Spreadsheet Data Entry Guidelines

Tasks

Create Web Service Data Source

Set Up Inbound EIB

Reference

Reference: Custom Objects (Single-Instance)

Reference: Custom Objects (Multi-Instance)

Example: Define Essential Workers with Custom Objects

This example illustrates how to configure custom objects on a worker profile to designate workers as essential service providers.

Context

You want to run reports to identify essential workers so you can plan workforce deployment. You create a custom business object on a worker profile to define which workers are essential.

Prerequisites

Security: these domains in the System functional area:

- Custom Object Management
- Security Configuration

Steps

1. Access the Create Custom Object task.

   Create a single-instance custom object on effective-dated worker objects.
2. Enter these values:

Field	Value
Workday Object:	*Worker*
Custom Object Name:	*Essential Service Worker*

3. Click OK.
4. On the General Settings section, edit the Allow Multiple Instances per Object? field to No.
5. Click Next.
6. On the Field Definitions section, click Add to add each of these Proposed New Fields:

Field Label	Field Type
Ref ID	*Text*
Reason	*Text*
Comment	*Text*
Permanently Essential	*Boolean*
Start Date	*Date*
End Date	*Date*
Updated By	*Text*
Updated On	*Date*
Secondary Reason	*Text*

7. Click Next.
8. On the Permissions section, select the *Custom Object Management* security domain to secure your new custom business object. See Concept: Security for Custom Objects for more information.
9. Click Next then OK.
10. On the Activate Custom Object page, configure these fields:

Option	Description
Display Value	*Permanently Essential*
Reference ID	*Ref ID*

11. Click OK and Done.
12. Create Custom Object Validations.

13. Edit Domain Security Policies.
    a) On the domain security policy that secures the new business object, add relevant security groups with:
        - View permissions to enable them to view whether workers are categorized as essential. Workday recommends that you include Manager, HR Partner, and Employee as Self security groups.
        - Modify permissions to enable them to define whether workers are essential.
14. Activate Pending Security Policy Changes.
15. On the *Edit Worker Additional Data Event* business process, add a new step to the business process, Edit Additional Data, for the custom object.
16. View workers' essential/non-essential statuses in their Worker Profiles.

    See Display Additional Data in Profiles.

Result

Next Steps

You can:

- Create custom reports and dashboards to filter for essential workers. See Create Custom Reports.
- Create a dynamic document that workers can generate in situations where they need to prove their essential worker status. See Steps: Manage Reference Letters .
- Access the:
    - Custom Object Definitions report to view details about your custom object.
    - Edit Custom Object report to edit your custom object and its labels.

Related Information

Concepts

Concept: Custom Fields in Custom Reports and Calculated Fields on page 496

../../../integrations/workday-extend/workday-extend-fundamentals/fdy1529428780920.dita

Tasks

Create and Edit Custom Object Definitions on page 485

Steps: Set Up Custom Objects on page 484

Reference: Custom Object and Field Limits

Custom Objects

- For each extendable Workday business object, you can create custom objects with up to 200 active custom fields. When you remove or inactivate custom fields, they don't count toward that limit. You can't restore an inactive field if doing so would exceed the active field limit for the business object.

  Example: You can create:
    - A custom object on a Workday business object with 200 active custom fields.
    - 200 custom objects with 1 custom field in each custom object.
    - Any combination of custom fields and custom objects that doesn't exceed 200 active custom fields.
- Separate limits apply for effective-dated and non-effective-dated business objects. The maximum of 200 fields applies to each object.

  Example: You can have 200 custom fields each for Worker (effective-dated) and Worker (non-effective-dated).

- A multi-instance custom object can have up to 1,500 instances for each extended Workday business object when you manage them from the Workday user interface. You can have up to 10,000 instances when you manage them using the REST API. When you exceed the 1,500-instance limit, the instances aren't visible in the Workday UI. You can use a custom report to view them.

  Example: When you create a Certifications custom object on the Worker business object, you can store up to 1,500 Certifications for each Worker.
- A custom object can have up to 5 currency type active custom fields. You can't restore an inactive currency type field on a custom object that has 5 active currency type fields.
- You can add a Reference ID when you create a custom object, but you can't change the Reference ID once you activate the custom object.
- A custom list can have up to 10,000 values. Inactive values count toward that limit.

Note: For Workday Extend, when you have more than 100 custom fields for an effective-dated business object, some fields might be truncated when you view them in an approval step. To avoid truncated fields, configure multiple approval steps or create a separate business process using Workday Extend.

Custom Field Types

You can always edit the name of a custom field type, but you can't change the field type after the custom field is used.

Custom Field Type	Value Limits	Additional Information
Boolean		
Currency	16 integer positions and 3 decimal positions.	
Date		
Decimal	16 integer positions and 3 decimal positions.	
Instance Reference		See Create Custom Instance References on page 489.
Integer	-2147483648 to 2147483647.	
List	10,000 list items.	See Create Custom Lists on page 491.
Paragraph Text	5,000 characters. (Can't contain formatting, such as bold or new paragraphs.) You can configure the maximum length to any number between zero and 5,000. The default limit is 250 characters.	The Wide-Text Display option on the definition displays the field values as paragraphs (rather than one long line).
Text	255 characters.	The Wide-Text Display option on the definition displays the field values as paragraphs (rather than one long line).

Related Information

Tasks

Create Custom Instance References on page 489

Create Custom Field Types on page 490

Calculated Fields

Setup Considerations: Calculated Fields

You can use this topic to help make decisions when planning your configuration and use of calculated fields. It explains:

- Why to set them up.
- How they fit into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What They Are

Calculated fields are configurable field definitions associated with a business object that use data in Workday.

Business Benefits

Calculated fields enable you to work with data in your tenant on transactions throughout Workday, including:

- Business processes.
- Integrations.
- Reporting.
- Scheduling recurring processes.

You can view the data how and where you want it by performing arithmetic calculations, creating logical and conditional expressions, and transforming your data.

To capture accurate data, Workday resolves calculated fields when the fields run because the values of other fields used to determine the value of calculated fields can vary.

Use Cases

You can set up calculated fields:

- As condition rules and metrics for business processes.
- For custom pay result reporting.
- For time tracking and entry validations to evaluate data.
- To override data collected for document transformation and Enterprise Interface Builder (EIB) integrations.
- To send notifications to all workers and new hires.

Questions to Consider

Questions	Considerations
What Workday-delivered calculated fields should you use?	Workday delivers tenant-wide calculated fields that you can use in multiple reports in Workday. They provide 1 less calculated field that you need to create in your tenant. You can run these reports to view Workday-delivered calculated fields:

Questions	Considerations
	• Calculated Fields Defined: Displays all calculated fields defined in your tenant and includes information on where you use the calculated field. • Report Fields: Displays the Workday-delivered calculated fields and report fields in your tenant.
Where and how do you want to use the calculated fields?	Workday enables you to use report-specific and tenant-wide calculated fields throughout Workday. You can convert report-specific calculated fields into tenant-wide and the other way around. Use report-specific calculated fields if you: • Plan to use the calculated field in a single integration or report definition. • Want to limit the scope directly in the report definition. Use tenant-wide calculated fields if you: • Don't plan on updating the parameters of the calculated field. • Plan to use them throughout Workday. • Want fewer duplicated calculated fields in your tenant. • Want to reuse them in multiple reports.
Where can calculated fields help improve your workflow?	You can use calculated fields on: • Business processes to control condition steps. • Integrations, such as with connectors and Enterprise Interface Builders (EIBs). • Reports to create related calculated fields and add them to custom reports. • Schedules for recurring processes to dynamically determine when they run.
Which business objects should you associate with your calculated fields?	Calculated fields can deliver data that would otherwise be unavailable from the primary business object of the report. The business object determines: • Where you can use the calculated field. • Which fields you can use in the calculated field definition. You can view all fields available for a business object by running the Business Object Details report.

Recommendations

- Before configuring local scripts, ensure that the calculated field can accommodate additional local script fields.

- Consider the downstream impacts to processes such as financial reports or hiring business processes whenever you update a calculated field.
- Consider the impacts to security and create security groups to control who can create or edit calculated fields.
- Consider the standard order of operations rule, known as PEMDAS, for mathematic expressions in calculated fields:
    1. Parentheses
    2. Exponents
    3. Multiplication
    4. Division
    5. Addition
    6. Subtraction
- Incrementally test calculated fields in a nonproduction environment to ensure proper configuration for all users.
- Label your calculated fields so all users can easily identify them.
- Use the most granular report field when creating calculated fields with related business objects so there are fewer instances to evaluate.
- When using multiple calculated fields, consider a hierarchical structure and create the foundational calculated fields first. Start with the specific data you want to return, then decide on the calculated fields you need to achieve that result.

Requirements

When you use calculated fields based on:

- Constant values: Configure the static date, numeric, and text values as references for calculated fields that build on constants.
- Currency conversion rates: Configure the currency exchange rates, calculate cross rates or inverse rates, or override existing currency exchange rates to avoid errors when using calculated fields with different currencies.
- Currency rates: Configure the currency rate types for multiple currency conversion rates to avoid errors when the calculated field runs.

Limitations

- For currency calculated field results, Workday adheres to ISO currency code standards to determine the number of decimal places.
- For numeric calculated field results, Workday displays up to 6 decimal places.
- For discovery boards and the Report Writer, you can't filter on fields that return derived instances, such as lookup date rollup calculated fields.
- You can't use report-specific calculated fields on simple reports.
- You can't set up calculated fields as eligibility rules for business processes.

Tenant Setup

No impact.

Security

Domains	Considerations
Custom Field Management domain in the System functional area	Enables users to create, change, or delete tenant-wide calculated fields.

Domains	Considerations
Private Calculated Field Management domain in the System functional area	Enables users to create, change, or delete report-specific calculated fields.

Business Processes

No impact.

Reporting

Reports or Dashboards	Considerations
All Calculated Fields	Displays all calculated fields in your tenant.
Calculated Field Exception Audit	Displays the severity, location, and solutions for tenant-wide calculated field exceptions.
Calculated Field Usage Hierarchy	Displays the downstream areas and objects affected when you change calculated fields used on reports.
Maintain Calculated Fields	Displays all tenant-wide calculated fields in Workday. Also enables you to convert a tenant-wide calculated field into a report-specific calculated field. Workday displays the Convert button when all of these conditions are true: • The calculated field has only 1 usage. • The only usage is a custom report. • The custom report is owned by the current user. When the tenant-wide calculated field is converted to a report-specific calculated field, the tenant-wide calculated field will no longer display in Maintain Calculated Fields.
Maintain Calculated Fields for Report	Displays all report-specific calculated fields in Workday. Also enables you to convert a report-specific calculated field into a tenant-wide calculated field. The Convert button displays only on the rows of calculated fields that can be converted. You can click Convert All to convert all report-specific fields into tenant-wide calculated fields. You can only convert calculated fields that don't depend on other report-specific fields.
Recently Updated Calculated Fields	Displays the date, time, and location for changes made to calculated fields in your tenant.
Report Specific Calculated Field Exception Audit	Displays the severity, location, and solutions for report-specific calculated field exceptions.
View Calculated Field	Displays details about a calculated field.

Integrations

You can use calculated fields with Workday integrations to use with connectors and in reports that can collect data for document transformation and EIBs.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships across your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Concepts

Concept: Calculated Fields on page 512
Concept: Calculated Fields and Calculations on page 587
Concept: Calculated Fields Security on page 514
Concept: Custom Fields in Custom Reports and Calculated Fields on page 496

Tasks

Create Calculated Fields for Custom Pay Result Reporting
Override Currency Decimal Precision on page 340

Reference

Reference: Calculated Field Functions on page 555
The Next Level: Calculated Field Foundations
The Next Level: Considerations for Calculated Field Names
The Next Level: Define Your Organization's Workday Reporting Guidelines
The Next Level: Navigating the Object Model for Creating Complex Calculated Fields

Create Calculated Fields

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can create calculated fields to use in reports and throughout Workday to:

- Derive values.
- Group and transform data.
- Manipulate data.
- Retrieve values.

You can create a report-specific calculated field directly within a report definition. You can also create additional calculated fields from within the definition of another calculated field.

Steps

1. Access the Create Calculated Field task.
2. In the Field Name field, enter a name that makes the calculated field easily identifiable.
3. Select a Business Object from the prompt, which determines:
    - Where you can use the calculated field.
    - Which fields you can use in the calculated field definition.

    You can view all fields available for a business object by running the Business Object Details report.
4. From the Function prompt, select the calculated field function.
5. On the Calculation tab, configure the calculations for the field.

6. (Optional) On the Additional Info tab, select an option from the Category prompt to group the calculated field into functional categories. Example: *Financial Reporting*, *Payroll*, or *Talent*.
7. (Optional) Select an option from the Authorized Usage prompt to enable where you can use the calculated field.
8. As you complete the Options prompt in the Advanced section, consider:

Option	Description
Do not use Alternate Display ID	Select the check box to enable Workday to use the display ID from the text source instead of the alternate display ID. This option is available for these calculated field functions: • Concatenated Text • Convert Text to Number • Format Text • Substring Text • Text Length
Include as a default View By field in drill downs	Select the check box to enable these calculated fields functions as options in the Group By Fields section on the Drill Down tab of your matrix report: • Boolean • Date • Numeric • Single Instance • Text

Next Steps

Access the:

- Calculated Field Exception Audit or Report Specific Calculated Field Exception Audit reports to verify the proper configuration of the calculated field.
- Calculated Field Usage Hierarchy report to assess the downstream impacts of making changes to calculated fields used in reports.
- View Calculated Field report to gain additional insights on pre-existing calculated fields.

Create a calculated field from within another calculated field definition.

Related Information
Concepts

Concept: Global Fields

Concept: Report-Specific Calculated Fields on page 514

Reference

Reference: Calculated Field Functions on page 555

The Next Level: Considerations for Calculated Field Names

Concept: Calculated Fields

Calculated fields are configurable field definitions associated with a business object that use data in Workday. You can view the data how and where you want it by performing arithmetic calculations, creating logical and conditional expressions, and transforming your data. Workday uses the standard order of operations rule, known as PEMDAS, for mathematic expressions:

1. Parentheses
2. Exponents
3. Multiplication
4. Division
5. Addition
6. Subtraction

Calculated fields enable you to work with data in your tenant on transactions throughout Workday, including:

- Business processes.
- Integrations.
- Reporting.
- Scheduled recurring processes.

You can select functions for different calculation requirements that enable you to:

- Aggregate, group, or summarize data.
- Concatenate a series of text fields within Workday.
- Convert a currency to another currency.
- Convert a text field number into a numeric data type.
- Create date, numeric, or text fields and values to use as constant values in other calculations.
- Determine if a condition is true or not.
- Determine organizational role assignments.
- Determine the appropriate range band for the value of a numeric field.
- Determine the value of a field as of a specific date.
- Drill down on an organizational hierarchy.
- Enable users to enter values for Workday-delivered fields with built-in prompts.
- Extract single instances or multiple instances, and either count or sum related instances.
- Format date, numeric, and text fields.
- Group and transform data by evaluating a series of boolean conditions.
- List all instances associated with a source field related to the business object.
- Perform simple mathematic calculations on currencies, dates, and numbers.
- Retrieve data from related objects.
- Return the number of characters and spaces in a single instance or text field.
- Return the value of a field on a related business object.
- Specify values for boolean conditions and return grouped instances.
- Translate a text field into a specified language.

For numeric calculated field results, Workday displays up to 6 decimal places. For currency calculated field results, Workday adheres to ISO currency code standards to determine the number of decimal places. Example: If $10 ÷ $3 = 3.333333 (numeric), then $10 ÷ 3 = $3.33 USD (currency).

Related Information

Concepts

Concept: Calculated Fields and Calculations on page 587

Concept: Indexed Data Sources and Fields

Concept: Report-Specific Calculated Fields on page 514

Concept: Tenant-Wide Calculated Fields on page 515

Tasks

Override Currency Decimal Precision on page 340

Reference

Reference: Calculated Field Functions on page 555

Reference: Calculations and Calculated Fields Comparison on page 606

Concept: Calculated Fields Security

Security for calculated fields determines your access to the underlying fields in a report and determines the returned values for both report-specific and tenant-wide calculated fields. If you have authorization to view all field values in a calculated field, then Workday displays the appropriate value. If you don't have authorization, then zero displays for currency or numeric fields and a blank value displays for all other field types.

You can use a calculated field only if you have access to all of the fields in the calculation. Example: The field *Extended Amount* multiplies the field *Hours* by the field *Rate*. You must have access to both *Hours* and *Rate* to use *Extended Amount*.

Changing a calculated field can cause unintended downstream impacts to other processes, including:

- Financial reports.
- Hiring business processes.
- Reports that auditors rely on.

It's critical that users have the appropriate level of calculated field access. To ensure control and consistency, consider limiting access to specific individuals or creating additional security groups to grant specific actions for these domains:

- *Custom Field Management*: Enables users to create, change, or delete any tenant-wide calculated field.
- *Private Calculated Field Management*: Enables users to create, change, or delete any report-specific calculated field.

To assess the impacts of making changes to calculated fields used in reports, access the Calculated Field Usage Hierarchy report.

Related Information

Concepts

Concept: Security Groups

Concept: Configurable Security

Tasks

Steps: Set Up Security Permissions

Edit Domain Security Policies

Reference

The Next Level: Report Security Troubleshooting Scenarios

Concept: Report-Specific Calculated Fields

Report-specific calculated fields are calculated fields used within a single report definition.

You can create report-specific calculated fields from the related actions menu of a custom report by selecting Calculated Field for Report > Create Calculated Field. You can also create them by selecting *Create Calculated Field for Report* from these prompts in a report definition:

- Business Object or Field on the Columns tab in an advanced report.
- Comparison Value on the Filter tab in a transposed report.
- Field on the Search Results tab in a search report.
- Group by Field on the Matrix tab in a matrix or nBox report.
- Summarization Field on the Trending tab in a trending report.

For advanced reports, *Create Calculated Field for Report* is available on the Field prompt of the Columns tab for report owners only.

Report-specific calculated fields are unavailable for simple reports.

You can also access the related actions menu on the custom report to:

- Maintain and view details for an existing report-specific calculated field by selecting Calculated Field for Report > Maintain.
- Understand the calculated field configuration for a report and view nested calculated fields by selecting Custom Report > View Calculated Field Hierarchies.

Changing a calculated field can cause unintended downstream impacts to financial reports, hiring business processes, reports auditors rely on, and so on. It's critical that users have the appropriate level of calculated field access. To ensure control and consistency, consider creating additional security groups to grant specific actions or limiting access to specific individuals for the *Private Calculated Field Management* domain. The domain enables users to create, change, or delete any report-specific calculated field in your tenant.

To assess the impacts of making changes to calculated fields used in reports, access the Calculated Field Usage Hierarchy report.

The Convert Calculated Field for Report task enables you to change a calculated field from report-specific to tenant-wide so you can use it in other areas throughout Workday. When you convert a calculated field,

- Workday doesn't convert other report-specific calculated fields that reference the converted calculated field. Run the Calculated Field Exception Audit or Report Specific Calculated Field Exception Audit report to view calculated field errors.
- Consider your security permissions, as you might have permission to create only report-specific calculated fields.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Create and Edit Custom Object Definitions on page 485

Concept: Tenant-Wide Calculated Fields

Tenant-wide calculated fields are fields you can use throughout your Workday tenant, including:

- Business processes.
- Condition rules.
- Custom reports.
- Integrations.

Because you can use tenant-wide calculated field simultaneously in multiple areas throughout Workday, changing a calculated field can cause unintended downstream impacts to other critical processes, including:

- Financial reports.
- Hiring business processes.
- Reports that auditors rely on.

It's critical that users have the appropriate level of calculated field access. To ensure control and consistency, consider limiting access to specific individuals or creating additional security groups to grant specific actions for the *Custom Field Management* domain. The domain enables users to create, change, or delete any tenant-wide calculated field.

For more visibility into the definitions of calculated fields, click Custom Report > View Calculated Field Hierarchies from the related actions menu of a report that uses calculated fields.

To assess the impacts of making changes to calculated fields used in reports, access the Calculated Field Usage Hierarchy report.

To change a calculated field from tenant-wide to report-specific, access the Convert Calculated Field task. To enable conversion, you can't use the calculated field in anything other than the report you want to associate it with.

Related Information

Concepts

Concept: Calculated Fields on page 512

Concept: Calculated Fields Security on page 514

Concept: Custom Fields in Custom Reports and Calculated Fields on page 496

Tasks

Create Calculated Fields on page 511

Create and Edit Custom Object Definitions on page 485

Calculated Field Functions

Aggregate Related Instances

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can configure the calculated field to list all instances associated with a source field on the business object. The calculated field excludes duplicate instances from the returned results.

Steps

1. Access the Create Calculated Field task.
2. Select *Aggregate Related Instances* from the Function prompt.
3. On the Calculation tab, select a single instance or multi-instance option from the Source Field prompt.
4. (Optional) On the Condition prompt, select a boolean option to apply to the results as a condition rule.
5. (Optional) Select a single instance or multi-instance option from the Fields to Aggregate prompt.

Result

You can use the calculated field in a report filter or add the calculated field to a custom report so you can drill into each returned instance. Workday lists the aggregated results in alphabetical order.

Example

You can use the calculated field to examine all positions within an organization and aggregate instances of job profiles.

Field	Value
Business Object	*Organization*
Source Field	*Positions*
Fields to Aggregate	*Job Profile*

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within an aggregate related instances calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Arithmetic Calculation

Prerequisites

- Create the numeric constants that you want to use in the calculated field.
- Security: *Custom Field Management* domain in the System functional area.

Context

You can set up the calculated field to derive values from currency or numeric fields by performing these simple arithmetic calculations:

- Addition
- Subtraction
- Multiplication
- Division

Self-referencing fields cause exceptions with this calculated field. You can determine if your calculated field is self-referencing by accessing Calculated Field > View Calculation Hierarchy from the related actions menu of the calculated field.

Steps

1. Access the Create Calculated Field task.
2. Select *Arithmetic Calculation* from the Function prompt.
3. As you complete the Calculation tab, consider:

Option	Description
Field Type	If you select *Currency*, all fields in the calculation must have the same currency code.
Rounding	Unless you select an option, Workday applies *round half up* when there are 6 decimal places. Example: 2.123456 rounds half up to 2.124. Workday performs rounding after each set of division and multiplication, so a group of numbers might not add up to the total displayed. If the Field Type is *Currency*, Workday doesn't perform any rounding.
Currency Code Field	If the Field Type is *Currency*, specify a currency code, such as EUR or USD. The Currency Code Field and currency codes for the currency fields in the calculation must match.

Option	Description
Return Zero on Error	Select the check box to return a zero value instead of displaying an error if the calculated field attempts to divide by zero. If you use a Prism business object with this calculated field, Workday always returns a zero on error.

4. As you complete the Arithmetic Expression grid, consider:

Option	Description
Parentheses	You can configure up to 9 levels of parentheses for calculations with: • Multiple operations. • Operations requiring a specific order.
Field	Available field options depend on the business object that you select.

Example

You can use arithmetic calculations to calculate a worker's:

- Daily, hourly, monthly, or weekly rate.
- Salary difference from this year compared to last year.
- Salary range penetration percentage.

You can also calculate 20% of a worker's salary to compare it against their bonus amount.

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within an arithmetic calculation calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Numeric Constant on page 547

Build Date

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can use the calculated field to create a new date or time field that uses components from other fields or specified values. By using the different date and time components, you can create a date field based on the:

- Day
- Month

- Year

You can create a time field based on these components that includes the time and time zone:

- Hour
- Minute
- Second
- Millisecond

Steps

1. Access the Create Calculated Field task.
2. Select *Build Date* from the Function prompt.
3. On the Calculation tab, select a value from the Field Type prompt.
4. As you complete the task for date field types, consider:

Option	Description
Specific Year *Specific Month* *Specific Day*	Specify a value or use a value from a field.
Extract Year from Date Field *Extract Month from Date Field* *Extract Day from Date Field*	Select to extract the day, month, or year from a date field.

5. As you complete the task for time field types, consider:

Option	Description
Specific Hour *Specific Minute* *Specific Second* *Specific Millisecond*	Enter an integer. If you enter zero for *Specific Second*, Workday changes zero to *None of the above* when you save the calculated field. This change doesn't impact the report results.
Extract Hour from Date/Time Field *Extract Minute from Date/Time Field* *Extract Second from Date/Time Field* *Extract Millisecond from Date/Time Field*	Select to extract the hour, minute, second, or millisecond from a field that includes time.
User's Timezone	(Available when you select the *DateTimeZone* Field Type.) Click to enable Workday to use the report runner's locale to determine the time zone.

Although you enter the time values on a 24-hour clock, Workday displays the time as a 12-hour clock.

Value Entered	Displayed Value
Hour: *0* Minute: *1*	12:01 AM
Hour: *1*	01:30 AM

Value Entered	Displayed Value
Minute: *30*	
Hour: *12* Minute: *1*	12:01 PM
Hour: *13* Minute: *30*	01:30 PM

6. (Optional) Select the Return Blank Date on Error check box to have Workday return a blank value rather than generating an error message when the report runs.

   If you use a Prism business object with this calculated field, Workday always returns a blank value on error regardless of your check box selection.

Example

You can use the build date calculated field to determine the first day of the month when a company hired an employee. Using the Worker business object, select:

- *Date* as the Field Type.
- *Hire Date* as the Extract Year from Date Field.
- *Hire Date* as the Extract Month from Date Field.
- *1* as the Specific Day.

You can add your build date calculated field to a custom report to display the results. Example: For an employee hired on 2006-02-17, Workday displays the build date field as 2/1/2006.

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within a build date calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Concatenate Text

Prerequisites

- Create the text constants that you want to use in the calculated field.
- Security: *Custom Field Management* domain in the System functional area.

Context

You can concatenate a series of text fields within Workday. When setting up the concatenated text field, Workday:

- Provides global text constants for commonly used special characters when concatenating fields.
- Removes any leading or trailing spaces from the results of a concatenated field.

Steps

1. Access the Create Calculated Field task.

2. Select *Concatenate Text* for the Function.
3. On the Calculation tab, select a Field in the grid.

   Available options depend on the business object. If you add rows, Workday concatenates the fields from top to bottom.
4. (Optional) In the Advanced section on the Additional Info tab, select the Do not use Alternate Display ID check box from the Options prompt.

   Instead of using the alternate display ID, Workday uses the display ID from the text source when concatenating text.

Example

You can:

- Append the literal *(cell)* to the end of a mobile phone number.
- Create a name field that generates *Smith, John, (Jack)* using the Worker business object. In the grid for the concatenate field, select these options for each row:
  1. *Legal Last Name*.
  2. A comma by accessing Global Fields > Text > ,.
  3. A space by accessing Global Fields > Text > Single Space.
  4. *Legal First Name*.
  5. A comma.
  6. A space.
  7. A left parenthesis by accessing Global Fields > Text > (.
  8. *Preferred Name*.
  9. A right parenthesis.

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within a concatenate text calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Text Constant on page 552

Convert Currency

Prerequisites

- Access the Maintain Currency Rate Types to configure additional currency rate types.
- Access the Maintain Currency Conversion Rates task to configure conversion rates.
- Security: *Custom Field Management* domain in the System functional area.

Context

You can configure the calculated field to convert a currency to another currency. When you run the condition or report using this calculated field, Workday evaluates the currency rate time and date, then returns the appropriate exchange value. You can get a zero value or an error if:

- The As Of Date Field has a blank value when the report runs.

- Workday can't find data for the Source Currency Amount Field, Target Currency Code Field, and Currency Rate Type.

Steps

1. Access the Create Calculated Field task.
2. Select *Convert Currency* from the Function prompt.
3. As you complete the Calculation tab, consider:

Option	Description
Source Currency Amount Field	Select the field for the conversion value.
Target Currency Code Field	Select the currency code to apply. You can select a currency code, such as *USD*, or select *Users Preferred Currency*.
As Of Date Field	Select the field to calculate the exchange rate. The As Of Date Field and Currency Rate Type prompts enable Workday to determine what exchange to use for the conversion.
Return Zero on Error	Select the check box to return a zero value instead of displaying an error if the As Of Date Field returns a blank value.

Example

You can use the convert currency calculated field to:

- Convert an expense report total to a common currency for business process approval rules that depend on an amount.
- Convert Canadian employee benefit contributions to USD for consolidated reporting with US benefit data.
- Determine all employee bonuses in USD using the exchange rate in effect at the end of last year.
- Display an employee's annual salary in EUR, regardless of how someone enters and stores it in Workday.

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within a convert currency calculated field.

You can use the calculated field as an average aggregated numeric field on advanced, matrix, or trending reports. To display 12 decimal places for the calculated field, select *#,##0.000000000000* or *#,##0.############* as a format option on the:

- Columns tab for advanced reports.
- Matrix tab for matrix reports.
- Trending tab for trending reports.

The formatting provides greater decimal precision for currency rates when you export reports to Excel or PDF.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Convert Text to Number

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can set up the calculated field to convert a text field number to a numeric value so you can perform calculations on that number. Example: You can convert a text field with a value of *200 expense lines* to the number *200*.

Steps

1. Access the Create Calculated Field task.
2. Select *Convert Text To Number* for the Function.
3. As you complete the Calculation tab, consider:

Option	Description
Text Field	You can select either a single instance or a text field to convert to a number. If you select a single instance field, Workday uses the display ID value of the field.
Decimal Separator	Select the symbol that indicates a separation between the whole number and the fraction, such as a comma or a period. Example: When you select*Based on user's locale*and theText Fieldis*123.4*, where the period is the decimal separator, Workday computes the value as*1234*for regions that use commas as decimal separators.
Return Zero on Error	Select the check box to return a zero value instead of displaying an error if the calculated field returns non-numerical data. If you use a Prism business object with this calculated field, Workday always returns a zero on error.

4. (Optional) In the Advanced section on the Additional Info tab, select the Do not use Alternate Display ID check box from the Options prompt.

   Instead of using the alternate display ID, Workday uses the display ID from the text source to convert the text to a number.

Example

You can use the convert text to number calculated field to convert these texts into numeric values to perform arithmetic calculations on:

- A worker's length of service in years.
- The 200 rows in an expense report.

Next Steps

Create:

- Additional calculated fields.
- New calculated fields from within a convert text to number calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Count Related Instances

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can use the calculated field to count the number of instances in a related business object based on a condition. Workday counts only the instances that you have permission to view.

Steps

1. Access the Create Calculated Field task.
2. Select *Count Related Instances* from the Function prompt.
3. On the Calculation tab, select a single instance or multi-instance option from the Related Field prompt.
4. In the Count section, click:
   - *All instances*.
   - *Instances where condition is true* to have Workday count only the instances that meet the specified condition.

Example

You can count:

- Employees hired during the last year by location.
- Managers in an organizational unit in order to compute the management span of control.
- Open positions in an organization.
- Sick days occurring on Monday or Friday during the last year for each employee.

You can create a count related instances calculated field that provides a count of involuntary employee terminations in your organization.

Field	Value
Business Object	Organization
Related Field	Termination Events
Count	Instances where condition is true
Instances where condition is true	Is Involuntary Employee Termination

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within a count related instances calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Date Constant

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can use the calculated field to create a date, time, or time zone constant for use in other calculations.

Steps

1. Access the Create Calculated Field task.
2. Select *Date Constant* from the Function prompt.
3. On the Calculation tab, select from these options and enter values to assign a constant to a field:
    - *Date*
    - *Date and Time*
    - *Date, Time and Timezone*

Example

You can use the date constant calculated field to:

- Compute headcounts or salaries as of *01/01/2017*.
- Determine how many new workers a company hired after a specified date.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Date Difference

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can set up the calculated field to compute the difference between 2 dates or times. Workday rounds down the results to the nearest whole number.

Steps

1. Access the Create Calculated Field task.
2. Select *Date Difference* for the Function.

3. As you complete the Calculation tab, consider:

Option	Description
Start Date Field	Select a field associated with the business object as the starting date for the calculation. Example: *Hire Date*.
End Date Field	Select a field associated with the business object as the ending date for the calculation. Example: *Termination Date*.
Return Zero on Error	Select the check box to return a zero value instead of displaying an error if the Start Date Field or End Date Field return a blank value. Example: If you hired a worker on 01/01/2020 and they're an active employee, they wouldn't have a termination date. If the End Date Field is *Termination Date*, Workday returns a blank value for the worker. Select the check box to display a zero instead of an error. If you use a Prism business object with this calculated field, Workday always returns a zero on error.
Ignore Lower Level Date Components	Select to enable Workday to ignore sublevel date or time values during calculation. Example: If you don't select the check box, the difference between 04/01/2006 and 02/15/2008 is 1 year. If you select the check box, the difference is 2 years because Workday computes the years, ignoring the day and month values.

Example

You can calculate the difference between 2 dates, such as the:

- Days remaining before a worker returns from leave.
- Days since a position opened.
- Months since a worker back-dated or forward-dated an expense report.
- Worker's age in years, as of 01/01/2019.

Next Steps

- Create additional calculated fields.
- Create new calculated fields from within a date difference calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Evaluate Expression

Prerequisites

- Create the date, numeric, or text constants that you want to use in the calculated field.
- Ensure the conditions and values that you want to evaluate already exist for the business object.
- Security: *Custom Field Management* domain in the System functional area.

Context

You can configure the calculated field to group and transform data by evaluating a series of true/false conditions. Workday:

- Evaluates the conditions sequentially.
- Returns the value that you specify for true conditions, or the Default Value for all false conditions.
- Stops testing when it yields a true condition.

Steps

1. Access the Create Calculated Field task.
2. Select *Evaluate Expression* from the Function prompt.
3. On the Calculation tab, select an option from the Field Type prompt.

   Except for multi-instance and single instance field types, your Field Type selection determines the field types available on the Return Value If Condition is True prompt. Example:

   - Text field types yield text options, date field types yield date options, numeric field types yield numeric options, and so on.
   - Multi-instance field types yield multi-instance, single instance, and self-referencing options.
   - Single instance field types yield single instance and self-referencing options.
4. (For *Multi-Instance* or *Single Instance* field types only.) Select a related business object from the Business Object prompt to evaluate boolean conditions against.

   You can use the resulting calculated field as a business object in a report.
5. Select an option from the Default Value prompt to return when the condition is false.
6. In the grid, select an option from the Condition prompt so Workday can evaluate the conditions sequentially as true or false.
7. Select an option from the Return Value If Condition is True prompt that displays if the condition is true.

Example

You can group and transform data to display the:

- Age group.
- Employment status.
- Management status.
- Seniority category based on length of service.

You can create an evaluate expression calculated field using the Worker business object to display the employment status of an employee. On the Calculation tab, select:

Prompt	Value
Field Type	*Text*
Business Object	*Worker*
Default Value	*Empty String*

In the grid, select:

Condition	Return Value If Condition is True
Worker Active	*Active*
On Leave	*On Leave*
Worker Retired	*Retired*
Worker is Terminated (but not Retired)	*Terminated*

You can create an evaluate expression calculated field using the Supplier Invoice Line business object to display supplier payee details. On the Calculation tab, select:

Prompt	Value
Field Type	*Single Instance*
Business Object	*Payee*
Default Value	*Empty Instance*

In the grid, select:

Condition	Return Value If Condition is True
Supplier is not empty	*Supplier as Worktag*
Contingent worker is not empty	*Contingent Worker*

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within an evaluate expression calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Evaluate Expression Band

Prerequisites

- Ensure the conditions and values that you want to evaluate already exist for the business object.
- Security: *Custom Field Management* domain in the System functional area.

Context

You can configure the calculated field to specify values for true/false conditions and return instances. Workday:

- Evaluates the conditions sequentially.
- Returns the Default Value for all false conditions or the value you specify for true conditions.
- Stops testing when it returns a true condition.

Steps

1. Access the Create Calculated Field task.
2. Select *Evaluate Expression Band* from the Function prompt.
3. On the Calculation tab, select an option from the Default Value prompt to return when the condition is false.
4. As you complete the grid, consider:

Option	Description
Condition	Select conditions associated with the business object so Workday can evaluate the conditions sequentially as true or false.
Return Value If Condition is True	Enter a value to display if the condition is true. Each true condition returns an instance.

Example

You can use the evaluate expression band calculated field to group workers by seniority based on their years of service, such as:

- *Junior* for less than 2 years of service.
- *Midlevel* for 3-10 years of service.
- *Senior* for more than 11 years of service.

You can also group cost centers based on your spending threshold, such as *On budget* or *Over budget*.

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within an evaluate expression band calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Extract Multi-Instance

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can use the calculated field to extract multiple instances from a related business object based on a boolean condition.

Steps

1. Access the Create Calculated Field task.
2. Select *Extract Multi-Instance* from the Function prompt.

3. On the Calculation tab, select the Operation Type.

Option	Description
Except	Evaluates the filtered instances from Source Field 1 and Source Field 2 and returns the instances from the first field minus the instances from the second. The related business object associated with both source fields must be the same.
Intersection	Evaluates the filtered instances from Source Field 1 and Source Field 2 and returns only the common instances. The related business object associated with both source fields must be the same.
Subset	Filters instances specified in Source Field 1 and returns the results.
Union	Combines the filtered instances from Source Field 1 and Source Field 2 and returns all results. The related business object associated with both source fields must be the same.

4. As you complete the Calculation tab, consider:

Option	Description
Source Field	Select the source field to apply a boolean condition to.
Condition	Specify the boolean condition associated with the related business object to apply to Source Field 1 and Source Field 2.

Result

Workday returns a set of multi-instance fields matching the defined criteria and removes any duplicate instances from the results. If no instances match the condition, Workday returns an empty value.

Example

You can use the calculated field to list:

- All staffing events associated with an employee's current position.
- Any employee event for an employee that occurred in 2009.
- Current enrollment elections for an employee.
- Teams to which an employee belongs.
- Training completed by each employee in the last 12 months.

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within an extract multi-instance calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Configure Calculated Fields with True/False Condition on page 553

Extract Single Instance

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can set up the calculated field to extract a single instance from a multi-instance field based on a boolean condition.

Steps

1. Access the Create Calculated Field task.
2. Select *Extract Single Instance* for the Function.
3. As you complete the Calculation tab, consider:

Option	Description
Source Field	Select a multi-instance field to apply the boolean condition to.
Condition	Specify the boolean condition associated with the related business object to apply to the Source Field.
Sort Field	Select a field to use as the basis for sorting. You can set up the Sort Direction and specify the number of Instance to be Returned. Example: Select *Workday ID* if you want Workday to sort the results by the employee's ID.

Result

Workday returns zero instances or 1 instance from a related business object that satisfies the boolean condition.

Example

You can use the calculated field to retrieve information about an employee, such as:

- Current dental, medical, and vision enrollments as separate fields.
- Dependents as Dependent #1, Dependent #2, and so on.
- Last completed performance review in 2018.
- Last master's degree received.
- Last time off request.

Next Steps

- Create additional calculated fields.

- Create new calculated fields from within an extract single instance calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511
Configure Calculated Fields with True/False Condition on page 553

Examples

Example: Sort Fields by the Related Business Object

Example: Create Condition Rules Using Calculated Fields for Student Residency Event

Format Date

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can configure the calculated field to extract part of a date field and format it as a text field.

Steps

1. Access the Create Calculated Field task.
2. Select *Format Date* from the Function prompt.
3. On the Calculation tab, select an option from the Date Field prompt.
4. As you select an option from the Format prompt, consider:

Option	Description
Fiscal Formats	You can click *Derived Fiscal Summary Schedule or Fiscal Period from Global Field* to prompt report runners for returned fiscal periods when running the report.
Format Mask	Workday provides additional date formatting flexibility beyond the predefined formats. Example: You can enter `'The time is:' hh:mm a` to format the text to *The time is 09:28 AM*. Mask options are case-sensitive and can combine with spaces, other characters, and single quotes. Hover over Format Mask to view examples of valid format values.

Example

You can use the calculated field to:

- Determine the fiscal year and period of an employee's hire date.
- Extract the month and day from an employee's birth date.
- Group and summarize headcount activity by month.
- List workers who have a birthday this month.
- Produce a list of promotions by quarter.

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within a format date calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Set Up Fiscal Schedules and Years

Reference

Reference: Date Format Symbols

Format Number

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can set up the calculated field to format a numeric field as a text field to:

- Concatenate it with other text.
- Use it as a notification.
- Use it in a custom report.

Steps

1. Access the Create Calculated Field task.
2. Select *Format Number* for the Function.
3. As you complete the Calculation tab, consider:

Option	Description
Source Field	Select a currency or numeric field associated with the selected business object.
Format	Select a format to apply to the resulting text field. Available options depend on your Source Field selection.
Options	Available options depend on your Source Field selection. Select Show Blank When Zero to display a blank value if a numeric field value is zero. If you use a Prism business object with this calculated field, Workday always returns a blank value.

Example

Return values:

Source Field	Example Value	Format	Options	Value Returned by Format Number
Years of Service	12	#,##0.0		12.0
Total Base Pay Annualized - Amount	65,520.00	#,##0	Show Currency Symbol	$65,520
Total Base Pay - Payroll	6,166.666667	#,##0.00	Show Currency Code	6,166.67 USD

Next Steps

- Create additional calculated fields.
- Create new calculated fields from within a format number calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Format Text

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can use the calculated field to remove or replace special characters and delimiters in single instance or text fields, or change fields to upper, lower, or proper case. You can also use the calculated field in certain integrations, such as bulk mailings for postal entities that require text to be in a specific format.

Steps

1. Access the Create Calculated Field task.
2. Select *Format Text* from the Function prompt.
3. On the Calculation tab, select a single instance or text field from the Source Field prompt.

   If you select a single instance field, Workday uses the display ID value of the field.
4. Select 1 of these options from the Options prompt:

Option	Description
Lower Case	Formats the text in lower case.
Proper Case	Capitalizes only the first letter of each name or word
Replace Delimiter	Removes or replaces special characters and delimiters. If you enter: • A space in the Replacement Text field, Workday treats that character as null or empty. • Special characters in the Text Delimiter field, copy the character exactly as-is. Workday treats the double space

Option	Description
	characters used in those languages as 1 character. This is particularly true for characters from Asian languages. Workday replaces 1 special character at a time and replaces values exactly as entered.
Upper Case	Formats the text in upper case.

5. (Optional) In the Advanced section on the Additional Info tab, select the Do not use Alternate Display ID check box from the Options prompt.

   Instead of using the alternate display ID, Workday uses the display ID from the original value while formatting the text.

Example

Original Value	Upper Case	Lower Case	Proper Case
logan mcNeil	LOGAN MCNEIL	logan mcneil	Logan Mcneil
James D. Moore	JAMES D. MOORE	james d. moore	James D. Moore
123 main street	123 MAIN STREET	123 main street	123 Main Street

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within a format text calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Increment or Decrement Date

Prerequisites

- Create the numeric constants you want to use in the calculated field.
- Security: *Custom Field Management* domain in the System functional area.

Context

You can use the calculated field to compute a date that's a specific number of days, months, or years before or after the date field. You can also add or subtract time to or from a date field that captures time data.

Steps

1. Access the Create Calculated Field task.
2. Select *Increment or Decrement Date* from the Function prompt.
3. On the Calculation tab, select an option from the Date Field prompt to use as the starting date.

   To enable time, specify a date field that includes a time component.

4. (Optional) Select options from these prompts to specify the date or time to add to or subtract from the Date Field:
    - Years to Add or Subtract
    - Months to Add or Subtract
    - Days to Add or Subtract
    - Hours to Add or Subtract
    - Minutes to Add or Subtract
    - Seconds to Add or Subtract
    - Milliseconds to Add or Subtract

    Time prompts are available only for date fields that include a time component.
5. (Optional) Select the Return Blank Date on Error check box to return a blank value instead of an error message when the calculated field returns a blank value.

    If you use a Prism business object with this calculated field, Workday always returns a blank value regardless of your check box selection.

Example

You can use the calculated field to:

- Calculate 2 months from now for use in a report filter that selects employee certifications expiring in the next 2 months.
- Calculate the end of an employee's 6-month probationary period based on the hire date.
- Look up the prior value of a field by subtracting 1 millisecond from when a business process event ran.

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within an increment or decrement date calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Numeric Constant on page 547

Lookup Date Rollup

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can configure the calculated field to look up dates in Workday and display the value in the format you specify for these schedules:

- Fiscal
- Period
- Weekly

Workday doesn't support lookup date rollup calculated fields on:

- Discovery board sheet and visualization filters.

- The Report Writer filters because the field returns derived instances.

Steps

1. Access the Create Calculated Field task.
2. Select *Lookup Date Rollup* for the Function.
3. On the Calculation tab, select the Date Field and Format.

   If you select a fiscal format, you can prompt users for returned fiscal periods using the Derived Fiscal Summary Schedule or Fiscal Period from Global Field prompt.

Example

You can use the calculated field to aggregate, group, or summarize data for a time period, fiscal schedule, or weekly schedule so that Workday returns:

- *2015-Q1* as the fiscal year-quarter rollup format for the date 01/01/2015 in a fiscal schedule or period.
- The week end date so you can use it as the repeating field in a repeating column group in a composite report.

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within a lookup date rollup calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Lookup Field with Prompts

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can configure the calculated field to provide values for Workday-delivered fields with built-in prompts.

Steps

1. Access the Create Calculated Field task.
2. Select *Lookup Field with Prompts* from the Function prompt.
3. On the Calculation tab, select a Workday-delivered field with built-in prompts from the Source Field prompt.

   You can access the related actions menu of a field to view the associated built-in prompts.
4. In the Prompts for Source Field grid, select an option from the Value Type prompt for the populated Prompt Field.

   If you select *Specify Value* and the Prompt Field is required, select an option for the Value prompt.

Example

You can use the lookup field with prompts calculated field to enter values for built-in prompts within report fields, such as:

- The Value *Division* for the Prompt Field *Show Custom Organization Type* when running a report to gain additional information about workers.
- Values for the Prompt Field *Translated Credit Minus Debit Amount* so you can analyze planned against actual data.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Create Calculated Fields for Custom Pay Result Reporting

Lookup Hierarchy

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can use the calculated field to report on your hierarchical data in Workday, including custom hierarchies and financial data. Lookup hierarchy retrieves data from Workday objects with a hierarchical structure and returns a single instance field containing the hierarchy node.

Workday doesn't enable you to assign a superior organization to a calculated field-referenced top-level node for these hierarchy types:

- Company.
- Cost Center.
- Custom organizations enabled for hierarchies.
- Location.
- Region.

The calculated field considers the hierarchy level security and displays only the levels or nodes the report runner has permission to access.

Steps

1. Access the Create Calculated Field task.
2. Select *Lookup Hierarchy* from the Function prompt.
3. As you complete the Calculation tab, consider:

Option	Description
Hierarchy Type	Select a field to use as the top-level hierarchy. Available options depend on your Source Field selection.
Top Level Node in Hierarchy	Select a field to use as the top-level node based on your selected Hierarchy Type.
Hierarchy Node to be Returned	Click: • *Level Number* to have the calculated field return the node at the specified level in the hierarchy. • *Level Name* to have the calculated field return the highest node with the specified name.

Option	Description
	• *Hierarchy Node Assigned* to have the calculated field return the node associated with the selected business object.
Return first node if multiple nodes found	Select the check box to return only the first node if the calculated field determines multiple nodes meet the criteria. Workday randomly selects the first node to display. If multiple nodes meet the criteria and you don't select the check box, Workday returns an error.

Example

You can use the lookup hierarchy calculated field to:

- Group purchase order lines by a defined level in the Spend Category Hierarchy in an expense report.
- Retrieve a count of employees and subordinates from specific management levels in a supervisory organization.

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within a lookup hierarchy calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Lookup Hierarchy Rollup

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can use the calculated field in matrix reports to report and drill down on your hierarchical data.

Workday considers the hierarchy level security of the report runner and enables them to access only permissible levels. Workday returns a blank value for data the report runner doesn't have access to.

Steps

1. Access the Create Calculated Field task.
2. Select *Lookup Hierarchy Rollup* from the Function prompt.

3. As you complete the Calculation tab, consider:

Option	Description
Source Field	Select a field associated with the selected business object.
Hierarchy Type	Select a field to use as the top-level hierarchy. Available options depend on your Source Field selection.
Top Level Node in Hierarchy	Select a field to use as the top-level node based on your selected Hierarchy Type.

Example

You can use the lookup hierarchy rollup calculated field to view summarizations of and drill down on:

- Data within a Cost Center hierarchy in an expense report.
- Employees within a Supervisory Organization hierarchy.

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within a lookup hierarchy rollup calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Lookup Organization

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can configure the calculated field to determine an employee's organization level or node based on the criteria setup using 1 of these business objects:

- Employee
- Worker

Workday returns only the organization levels or hierarchy nodes the report runner has permission to view.

Steps

1. Access the Create Calculated Field task.
2. Select *Lookup Organization* from the Function prompt.
3. As you complete the Calculation tab, consider:

Option	Description
Field Type	If you select *Single Instance* and the role has more than 1 employee assigned, Workday returns only the first employee.

Option	Description
Organization Type	Select a field based on your Field Type selection.
Subtype	Select to filter the organization hierarchy by a subtype.
Top Level Organization	Select to specify which organization hierarchy to use in the calculated field.

4. (Optional) In the Advanced section, select the Allow Top Level Organization to be Blank check box to make the Top Level Organization prompt optional.

Example

Mark belongs to this organization hierarchy. You want to determine his organization level and hierarchy node.

Organization Level	Hierarchy Node
1	ABC International
2	Executive Management
3	Finance and Administration

When you click *Organization associated with level* for the Return Value, you can enter a number to return the hierarchy node:

- Organization level *1* returns *ABC International*.
- Organization level *2* returns *Executive Management*.
- Organization level *3* returns *Finance and Administration*.

When you click *Organization assigned* for the Return Value, you can look up Mark's specific organization, which is *Finance and Administration*.

Related Information
Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Lookup Organizational Roles

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can use the calculated field to determine organization role assignments based on specified criteria that use 1 of these business objects:

- Employee
- Organization
- Worker

If the business object is Employee or Worker, Workday:

- Doesn't return any results for role assignments for custom organizations.

- Returns employees with the specified role and displays the role assignments on the Roles tab of an organization.

If the business object is Organization, Workday returns employees with the specified role and:

- Displays the role assignments on the Roles tab of an organization.
- Returns role assignments for custom organizations.

Steps

1. Access the Create Calculated Field task.
2. Select *Lookup Organizational Roles* from the Function prompt.
3. On the Calculation tab, select an option from the Field Type prompt.

   If you select *Single Instance* and the role has more than 1 employee assigned, Workday randomly selects an employee to display. Workday caches the results, then randomizes the first employee selection when another uncached request executes.
4. (Optional) Select an option from the Organization Type prompt.

   If you don't select an Organization Type and the business object is Employee or Worker, Workday:

   a. Determines each employee's assigned organization.
   b. Returns the employees who hold the organizational role for those organizations.

   If you specify an Organization Type and the business object is:

   - Employee or Worker, Workday returns employees who hold the organization role for all organizations with the specified organization type.
   - Organization, Workday returns results only if the organization type is the same as the processed organization instance.

Example

You can use the calculated field to:

- List each employee's Expenses Representative.
- Report on the Facilities Manager for each Supervisory Organization.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Lookup Range Band

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can configure the calculated field to look up a specific value and determine where it falls in relation to a set of ranges you configure. When you use the calculated field in a report, Workday returns a single instance field corresponding to the range band that the source field falls in.

Workday optimizes report performance by indexing your calculated field so the report can run faster if you use this calculated field with an indexed:

- Numeric field on the Source Field prompt.
- Report data source.

Steps

1. Access the Create Calculated Field task.
2. Select *Lookup Range Band* from the Function prompt.
3. As you complete the Calculation tab, consider:

Option	Description
Source Field	Select a currency or numeric field associated with the business object as the basis for the range.
Decimal Places	Select a value to use with the From Value in the grid. Example: If you select *2* Decimal Places and enter *50* for the To Value, Workday automatically displays *50.01* as the From Value for the next row.
Rounding	Select a rounding method for Workday to apply in the report results: • *Round*: Depending on the value, Workday rounds it either down or up. Example: If you enable zero decimal places and have a value of *1.5*, Workday rounds up to *2*. If the value is *1.4*, Workday rounds down to *1*. • *Round down*: Rounds the value down unconditionally. Example: If you enable zero decimal places and have a value of *1.9*, Workday rounds down to *1*. • *Round half down*: Halves the number of decimal places in the value. Example: If you enable 4 decimal places and have a value of *2.1234*, Workday halves decimal places of the value to *2.12*. • *Round up*: Rounds the value up unconditionally. If you enable zero decimal places and have a value of *1.1*, Workday rounds it up to *2*.

4. Enter values for the From Value and To Value fields.
5. (Optional) Enter text in the Return Value field if you want to associate a phrase or word with the returned value.

Example

You can determine where an employee's total compensation falls in relation to specified ranges.

From Value	To Value	Return Value
0	*154,999*	*Not Highly Compensated*
155,000	*500,000*	*Highly Compensated*

An employee whose total compensation is $110,000 would return a value of *Not Highly Compensated*.

Other usages:

- Age as of a point in time.
- Days overdue.
- Length of service.
- Salary increase percentage.

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within a lookup range band calculated field.

Related Information
Concepts
Concept: Calculated Fields on page 512
Tasks
Create Calculated Fields on page 511

Lookup Related Value

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can configure the calculated field to look up and return the value of a field on a related business object. You can also promote fields from a related business object to the primary business object so that you can perform these actions on the fields:

- Filter
- Group
- Report
- Sort
- Summarize

You can configure the calculated field to use an indexed report data source and indexed field conditions to optimize report performance. When indexing the calculated field, the report can run faster for filtering for all report types except composite and simple. In addition to using the calculated field in reporting, you can also use it in calculations or business process condition rules.

Steps

1. Access the Create Calculated Field task.
2. Select *Lookup Related Value* from the Function prompt.
3. On the Calculation tab, select a self-referencing or single instance field as the Lookup Field.
4. Select a Return Value associated with the related business object of the Lookup Field that you selected.
5. (Optional) In the Advanced section on the Additional Info tab, select the Use Return Value Field Formatting check box from the Options prompt for these field types:

Option	Description
Date	Workday applies the date precision of the Return Value field to the calculated field.

Option	Description
Instance	Workday uses the Alternate Display ID, if applicable, of the Return Value field on the calculated field.
Numeric	Workday uses the decimal, integer, or rounding configuration of the Return Value field on the calculated field.
Text	Workday retains the formatting of rich text fields.

Selecting the Use Return Value Field Formatting check box:

- Doesn't affect prompts.
- Retains formatting when you run the report or export it to PDF or XML. Workday doesn't retain formatting when you export the report to Microsoft Excel.

Example

You can use the lookup related value calculated field to:

- Include a manager's email address when reporting on workers.
- Require Vice President approval if a worker's one-time retention bonus is greater than 20% of their base pay.
- Expand the availability of field options within business process conditions rules. Business process rules and events determine the business objects available, but you can use the calculated field to reference other fields.
- Promote a field from a related business object (RBO) to a primary business object (PBO) so you can use the field on a matrix report. Matrix reports limit available fields to the PBO.
- Promote a field from an RBO to a PBO so you can use the field for grouping and totaling on an advanced report.
- Promote a field from an RBO to a PBO so you can use it in combination with a field on the PBO to create a calculated field.

There must be a one-to-one relationship between the PBO and RBO in order to use the lookup related value calculated field.

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within a lookup related value calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511
Create and Edit Custom Object Definitions on page 485

Lookup Translated Value

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can configure the calculated field to return the value of a text field in a specified language.

Workday doesn't retain rich text formatting when:

- Enabling Reports as a Service (RaaS).
- Translating values into other languages in report results.

Steps

1. Access the Create Calculated Field task.
2. Select *Lookup Translated Value* from the Function prompt.
3. As you complete the Calculation tab, consider:

Option	Description
Source Field	Select a text field associated with the business object as the basis for translation.
Language	Select a language to translate the Source Field to. Available options depend on the: • Business objects you enable for translation. • Languages available in your tenant.
Return Base Language if Not Found	Clear the check box to return a blank value instead of the base language for fields without translated values.

Example

You can use the lookup translated value calculated field to return:

- All translated values available for text fields associated with the selected business object.
- The names of organizations in English, French, and German.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Lookup Value as of Date

Prerequisites

- Create the date constants you want to use in the calculated field.
- Security: *Custom Field Management* domain in the System functional area.

Context

You can configure the calculated field to determine:

- If a value occurs before, on, or after an effective date.
- The value of a field as of a specific date.

If you use a business object that supports effective dating, Workday returns the:

- Latest value of a field entered on or before a specified date.
- Value of a field in-effect as of a specific date.

Workday stores only the current value of a field within a custom object, therefore returning the latest value regardless of the date specified.

Steps

1. Access the Create Calculated Field task.
2. Select *Lookup Value As Of Date* for the Function.
3. As you complete the Calculation tab, consider:

Option	Description
Source Field	Specify the field Workday looks up.
Effective Date	Specify an effective date for Workday to apply to the Source Field. Workday returns the value in effect as of this date and ignores any changes made after. If you select a Source Field without an effective dated business object, the function ignores any date you specify for the Effective Date. You can access the related actions menu of the Source Field and view its description to determine if the field is date effective.
Entry Date	Specify an entry date for Workday to return the latest value for the Source Field. Workday returns the value entered on or before this date and ignores any changes made after. Example: If you select a date without a time component, like *Today*, Workday sets the time to 00:00:00.

Example

You can use the calculated field to look up a:

- Dependent's age as of a certain time.
- List of workers whose address, name, or phone number changed last month.
- Worker's annual salary as of 12/31/2013.

Next Steps

- Create additional calculated fields.
- Create new calculated fields from within a lookup value as of date calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Date Constant on page 525

Numeric Constant

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can use the calculated field to assign a numeric constant to a field so you can use it in other calculations.

Steps

1. Access the Create Calculated Field task.
2. Select *Numeric Constant* from the Function prompt.
3. On the Calculation tab, enter a number in the Numeric Constant field.

   You can include:

   - A real number, such as -2.84 or 6.5
   - An integer, such as -9 or 173.

Example

You can use the numeric constant calculated field to:

- Compute a rolling window of time, such as 3 months.
- Set up a currency multiplier as of a certain date for currency exchange rates.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Prompt for Value

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can use the calculated field to prompt report runners for values to yield specific results when:

- Running reports that use this calculated field.
- Running embedded reports from business processes.
- Scheduling integrations or reports.
- Setting up prompts for embedded reports in business processes.
- Setting up the Prompts tab in custom reports.

Steps

1. Access the Create Calculated Field task.
2. Select *Prompt for Value* from the Function prompt.
3. On the Calculation tab, select an option from the Field Type prompt.

   If you select:

   - *Currency*, select an option from the Currency Code prompt to use for the prompt.
   - *Single Instance*, select an option from the Business Object prompt to be prompted for.
   - *Multi-Instance*, select an option from the Business Object prompt to be prompted for.
4. (Optional) Select the Required check box to indicate that the report runner must enter a value for the prompt.

Example

You can use the prompt for value calculated field to prompt the report runner to select:

- A company to yield company-specific results.
- The Time Off Type, such as *Unpaid* or *Sabbatical*, instead of entering the values in a true/false condition calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Substring Text

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can use the calculated field to extract a portion of text from a single instance or text field and return the result as a text field.

Steps

1. Access the Create Calculated Field task.
2. Select *Substring Text* for the Function.
3. On the Calculation tab, select a single instance or text field for the Text Field.

   If you select a single instance field, Workday uses the display ID value of the field.
4. Select the Substring Type.

   In the *Fixed Position*, the first character in the field holds position 1, the second character holds position 2, and so on. You can specify the length of the substring to extract with these options:

Option	Description
Fixed Length	The length of the substring starts at the specified Starting Character Position and continues for the specified length of characters. The substring value returns shortened or padded with spaces if: • The Starting Character Position is greater than the length of the text field. • The text field doesn't have enough characters to return a substring with a length equal to the fixed length specified.
Until End of Text Field	The length of the substring returned varies. The substring starts at the specified Starting Character Position and continues to the end of the field.

5. (Optional) For the *Between two Delimiters* Substring Type, select the Exclude Results without End Delimiters check box to exclude field results without an end delimiter and display a blank value. Clear the check box to return all field results, including results without an end delimiter.

6. (Optional) Select the Remove Leading and Trailing Spaces check box to remove spaces at the beginning and end of the substring.

   Example: If you have "A B C D " as the original string, you can select 2 as the start position and 5 characters as the fixed length. The substring is " B C " since spaces count as characters. The result is "B C" because Workday automatically removes leading and trailing spaces from the substring.
7. (Optional) In the Advanced section on the Additional Info tab, select the Do not use Alternate Display ID check box from the Options prompt.

   Instead of using the alternate display ID, Workday uses the display ID from the text source for substring text extraction.

Example

Table 1: After a Delimiter (Forward Direction)

After a Delimiter	Original String	Substring Result
"-"	"ABC-XYZ"	"XYZ"
"BC"	"ABC-XYZ"	"-XYZ"
"W"	"ABC-XYZ"	""
"/"	"07/04"	"04"

Table 2: After a Delimiter (Backward Direction)

After a Delimiter	Original String	Substring Result
"-"	"ABC-XYZ"	"XYZ"
" "	"Senior Clerk (Pleasanton)"	"(Pleasanton)"
" "	"Accounting 6373"	"6373"
" "	"Sales and Marketing 7283"	"7283"

Table 3: Before a Delimiter (Forward Direction)

Before a Delimiter	Original String	Substring Result
"-"	"ABC-XYZ"	"ABC"
"BC"	"ABC-XYZ"	"A"
"W"	"ABC-XYZ"	""
"/"	"07/04"	"07"

Table 4: Between Two Delimiters

Start Delimiter	End Delimiter	Original String	Substring Result
"["	"]"	"ABC-[XYZ]"	"XYZ"
"("	")"	"Logan McNeil (41600 HR Services)"	"41600 HR Services"

Table 5: Fixed Position (Until the End of the Text Field)

Starting Character Position	Original String	Substring Result
2	"Senior Clerk"	"enior Clerk"
8	"Senior Clerk"	"Clerk"
13	"Senior Clerk"	""

Table 6: Fixed Position (Fixed Length)

Starting Character Position	Fixed Length	Original String	Substring Result
2	5	"Senior Clerk"	"enior"
8	5	"Senior Clerk"	"Clerk"
8	3	"Senior Clerk"	"Cle"
8	10	"Senior Clerk"	"Clerk "
13	4	"Senior Clerk"	" " (4 spaces)

Next Steps

- Create additional calculated fields.
- Create new calculated fields from within a substring text calculated field.

Related Information
Concepts
Concept: Calculated Fields on page 512
Tasks
Create Calculated Fields on page 511

Sum Related Instances

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can use the calculated field to sum instances of a related business object based on a condition.

Workday sums only the related instances you have permission to view.

Steps

1. Access the Create Calculated Field task.
2. Select *Sum Related Instances* from the Function prompt.
3. On the Calculation tab, select a multi-instance or single instance field from the Related Field prompt.
4. In the Sum section, click:
   - *All instances*.
   - *Instances where condition is true* to sum only the instances that meet the specified condition.
5. Select a currency or numeric field from the Field to Sum prompt.

   If you select a currency field, all currency fields must use the same currency code. Otherwise, Workday displays an error.

Example

You can use the calculated field to:

- Calculate the average performance review rating for each organization.
- Calculate the VAT amount for each supplier invoice by summing the taxable invoice lines.
- Sum the employer benefit costs of an employee to calculate their total compensation.
- Sum the expense line items for meals in an expense report for comparison against an approval limit.
- Sum the total number of days off an employee has taken in a given time period.

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within a sum related instances calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511
Configure Calculated Fields with True/False Condition on page 553

Text Constant

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can use the calculated field to create a text constant for use in other calculations.

Steps

1. Access the Create Calculated Field task.
2. Select *Text Constant* from the Function prompt.
3. On the Calculation tab, enter any character string in the Text Constant field.

Example

You can use the text constant calculated field to:

- Append text to a field value using a concatenate text calculated field.
- Use the text *Highly Compensated* in an evaluate expression calculated field.
- Prefix an employee's title, such as *Dr.*, *Mr.*, *Mrs.*, or *Mx.* before their full name in an evaluate expression calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Text Length

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can configure the calculated field to return the number of characters in a single instance or text field, including spaces. You can use it in the filter criteria on a custom report to identify fields that truncate data during an integration.

Steps

1. Access the Create Calculated Field task.
2. Select *Text Length* from the Function prompt.
3. On the Calculation tab, select a single instance or text field for the Text Field.

   If you select a single instance field, Workday uses the display ID value of the field to determine the text length.
4. (Optional) In the Advanced section on the Additional Info tab, select the Do not use Alternate Display ID check box from the Options prompt.

   Instead of using the alternate display ID, Workday uses the display ID from the text source to determine the text length.

Example

You can use the calculated field to return the text length of a field, including spaces.

Field Name	Field Type	Field Value	Return Value
Primary Address – Line 1	Text	2563 Fourth Avenue	18
Country of Birth	Single Instance	Singapore	9

Next Steps

You can create:

- Additional calculated fields.
- New calculated fields from within a text length calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Configure Calculated Fields with True/False Condition

Prerequisites

Security: *Custom Field Management* domain in the System functional area.

Context

You can configure the calculated field to:

- Return *True* or *False* based on boolean conditions.
- Use an indexed report data source and indexed field conditions to optimize report performance. When indexing the calculated field, the report can run faster for filtering for all report types except composite and simple.

When using multiple filter conditions, we recommend that you use parenthesis to separate the OR and AND conditions. Example:

You want to filter for items that meet condition A and either condition B or condition C:

- To ensure that the report includes items that satisfy condition A, and also meet either condition B or condition C, use this expression: "A AND (B OR C)".

- If you omit the parentheses and use the expression "A AND B OR C", the reports interprets this as "(A AND B) OR C" and includes items that satisfy both conditions A and B, or items that satisfy condition C. The results is significantly different from what you intended.

Assuming:

- A = Location is Paris
- B = Department is Sales
- C = Job Family is Marketing

With "A AND (B OR C)", the report displays all workers in Paris who are either in the Sales department or the Marketing job family. With "(A AND B) OR C", the report displays all workers who are both in Paris and in the Sales department, plus all workers in the Marketing job family, regardless of location. The number of items in the result is much larger than expected.

Steps

1. Access the Create Calculated Field task.
2. Select *True/False Condition* from the Function prompt.
3. As you complete the Calculation tab, consider:

Option	Description
Field	Available options depend on the business object that you select.
Operator	Available options depend on the Field that you select.
Comparison Type	Specify whether to compare the Field to another field or to a value you enter.
Comparison Value	Select a comparison field or enter the value to compare to the Field.

Example

You can use the true/false condition calculated field to indicate if a worker:

- Enrolled in a Health Savings Account.
- Has less than a year of service.
- Has withholding orders.
- Is highly compensated.
- Received a signing bonus that you need to recover if the worker terminates.

You can configure the calculated field to evaluate the compensation and management level of workers in your company.

Field	Value
Business Object	*Worker*
Field	*Management Level*
Operator	*in the selection list*
Comparison Type	*Value specified in this filter*
Comparison Value	*1 Board of Directors* *2 Chief Executive Officer* *3 Executive Vice President*

Field	Value
	4 Vice President *5 Director*

On the second row, add:

Field	Value
And/Or	*Or*
Field	*Total Base Pay Annualized - Amount*
Operator	*greater than or equal to*
Comparison Type	*Value specified in this filter*
Comparison Value	*155000*

When you add the calculated field to a report, the results yield *Yes* for high compensation when an employee's total pay is $200,000 or their management level is as a Director or higher.

Related Information

Concepts

Concept: Calculated Fields on page 512

Tasks

Create Calculated Fields on page 511

Reference: Calculated Field Functions

Use calculated fields in your tenant on transactions throughout Workday to:

- Perform Calculations on Your Data on page 555
- Retrieve Your Data on page 557
- Change Your Data into Different Formats on page 561
- Configure Constant Values on page 563

Perform Calculations on Your Data

Calculated fields that perform mathematic expressions use the standard order of operations rule, known as PEMDAS:

1. Parentheses
2. Exponents
3. Multiplication
4. Division
5. Addition
6. Subtraction

Calculated Fields	Description	Examples
Arithmetic Calculation	Performs these simple calculations to derive values: • Addition • Division • Multiplication • Subtraction	Calculate a worker's: • Bonus amount as a percentage and compare it against their salary. • Daily, hourly, or weekly rate.

Calculated Fields	Description	Examples
		• Salary difference from this year compared to last year. See Example: Set Up Parental Leave.
Count Related Instances	Dynamically counts the number of instances in a related business object based on a condition.	Count: • Managers in an organizational unit to compute the management span of control. • Open positions in an organization. • Sick days occurring on Monday or Friday during the last year for each worker. • Workers hired during the last year for each location.
Date Difference	Computes the number of days, months, or years between 2 dates.	Calculate: • A worker's age in years as of a certain date. • The days remaining before a worker returns from leave. • The days since a position opened. • The months since a worker back-dated or forward-dated an expense report.
Increment or Decrement Date	• Computes a date that's a number of days, months, or years before or after the value of a date field. • Adds or subtracts a number of hours, minutes, seconds, and milliseconds to or from a date.	• Calculate 2 months from now for use in a report filter that selects worker certifications expiring in the next 2 months. • Calculate the end of a worker's 6-month probationary period based on the hire date. • Subtract 1 millisecond from the time that a business process event ran so you can determine the prior value of a field. See Example: Track Balances Rolling Forward for Coordinated Leaves and Time Off.

Calculated Fields	Description	Examples
Sum Related Instances	Sums the value of a field in instances of a related business object based on a condition.	Calculate the: • Average performance review rating for each organization. • VAT amount for each supplier invoice by summing the taxable invoice lines. Sum the: • Employer benefit costs of a worker to calculate their total compensation. • Expense line items for meals in an expense report for comparison against an approval limit. • Total number of days off a worker has taken in a given time period. See Example: Calculate the Majority of a Shift.
Text Length	Returns the number of characters and spaces in a single instance or text field.	Return the text length of a worker's: • City of birth so you can identify workers affected by the 15-character limitation to *City* fields when integrating third-party products. • Name so you can determine if you need to request a custom name tag for a new hire with a name longer than 20 characters. See Example: Restrict a National ID Length.

Retrieve Your Data

Calculated Fields	Description	Examples
Aggregate Related Instances	Lists all instances associated with a source field related to the business object.	Identify all job profiles within an organization. A single organization might include many positions, each with many job profiles. The calculated field can examine all the positions within an organization and return all instances of the job profile.

Calculated Fields	Description	Examples
		See Example: Enable Automatic Notifications for Recruiting Agency Users.
Evaluate Expression	Groups and transforms data by evaluating a series of boolean conditions.	Display a worker's: • Age group. • Employment status. • Management status. • Seniority category based on length of service. Enable users to select the granularity of grouping, such as *Month*, *Quarter*, or *Year* on the Trended Workers data source. See Example: Set Up Parental Leave.
Evaluate Expression Band	Specifies values for boolean conditions and returns grouped instances.	Group workers by seniority based on their years of service, such as: • Junior: Less than 2 years. • Midlevel: 3-10 years. • Senior: More than 11 years. Group cost centers based on your spending threshold, such as: • On budget. • Over budget.
Extract Multi-Instance	Extracts multiple instances from a related business object based on boolean conditions.	List: • All staffing events associated with a worker's current position. • Any worker event for a worker that occurred in 2015. • Current enrollment elections for a worker. • Teams a worker belongs to. • Training completed by each worker in the last 12 months.
Extract Single Instance	Extracts a single instance from a multi-instance field based on boolean conditions.	Retrieve information about a worker, such as their: • Current dental, medical, and vision enrollments, listed as separate fields.

Calculated Fields	Description	Examples
		• Dependents listed as separate fields, such as Dependent #1, Dependent #2, and so on. • First completed performance review in 2018. • Last degree received. • Last time off request as of April 2019. See Example: Create Condition Rules Using Calculated Fields for Student Residency Event.
Lookup Date Rollup	Aggregates, groups, or summarizes data for a time period, fiscal schedule, or weekly schedule.	Return: • *2015-Q1* as the fiscal year-quarter rollup format for the date 2015-01-01 in a fiscal schedule or period. • The week end date so you can use it in a repeating column group in a composite report.
Lookup Field with Prompts	Enables users to enter values for Workday-delivered fields with built-in prompts.	Enter: • The Value *Division* for the Prompt Field *Show Custom Organization Type* when running a report to gain additional information about workers. • Values for the Prompt Field *Translated Credit Minus Debit Amount* so you can analyze planned against actual data. See Example: Create Condition Rules for Absence Occurrences.
Lookup Hierarchy	Retrieves data from Workday objects with a hierarchical structure and returns a single instance field containing the hierarchy node.	• Group purchase order lines by a defined level in the Spend Category hierarchy in an expense report. • Retrieve a count of workers and subordinates from specific management levels in a supervisory organization.
Lookup Hierarchy Rollup	Rolls up report data based on an organization hierarchy,	View summarizations of:

Calculated Fields	Description	Examples
	starting at the topmost level of the hierarchy.	• Data and drill down on them within a Cost Center hierarchy in an expense report. • Workers and drill down on them within a Supervisory Organization hierarchy.
Lookup Organization	Determines a worker's organization level or node based on the assigned organization and criteria configuration using 1 of these business objects: • Employee • Worker	Determine a worker's: • Department. • Organization level.
Lookup Organizational Roles	Determines organization role assignments based on the criteria configuration using 1 of these business objects: • Employee • Organization • Worker	Determine organization role assignments and: • List each worker's Expenses Representative. • Report on the Facilities Manager for each supervisory organization.
Lookup Range Band	Determines where a specified value falls in relation to a set of configured ranges.	Determine if a worker's: • Performance review is within the Upcoming, Due, or Overdue range. • Total compensation falls in the Highly Compensated or Not Highly Compensated range.
Lookup Related Value	Returns the value of a field on a related business object. You can promote fields from a related business object to the primary business object so you can perform these actions on the fields: • Filter • Group • Report • Sort • Summarize	Return the value of a field to: • Include the email address of a manager when reporting on workers. • Require approval if a worker's one-time retention bonus is greater than 20% of their base pay. See Example: Calculate Location-Based Overtime.
Lookup Translated Value	Returns the value of a text field in a specified language.	Return: • A worker's position in a different language.

Calculated Fields	Description	Examples
		• The names of organizations in English, French, and German.
Lookup Value as of Date	Determines the value of a field as of a specific date and determines whether a change occurs before, on, or after the effective date.	Return: • A list of workers whose address, name, or phone number changed last month. • The age of a dependent as of a certain time. • The annual salary of a worker as of 2013-12-31. See Example: Calculate Location-Based Overtime.
Substring Text	Extracts a portion of text from a single instance or text field and returns the result as a text field.	Extract a portion of text from *ABC-XYZ*: • Before the - Delimiter to return *ABC*. • From the second Starting Character Position to return *BC-XYZ*. • From the second Starting Character Position with a Fixed Length of 4 to return *BC-X*.
True/False Condition	Returns *True* or *False* based on boolean conditions.	Indicate if a worker: • Elected to enroll in a Health Savings Account. • Has less than a year of service. • Has withholding orders. • Received a signing bonus that you need to recover if the worker terminates. See Example: Create Condition Rules Using Calculated Fields for Student Residency Event.

Change Your Data into Different Formats

Calculated Fields	Description	Examples
Concatenate Text	Concatenates a series of text fields within Workday to append text, use in notifications, and so on.	• Append *(cell)* to the end of a worker's mobile phone number. • Concatenate a worker's years of service to their name.

Calculated Fields	Description	Examples
		• Create a name field containing a worker's last name, first name, and preferred name. Example: *Smith, John (Jack)*. • Return the text notification: *Your current annual salary is $82,500.00*. See Example: Create an Intersection.
Convert Currency	Converts a currency to another currency.	• Convert an expense report total to a common currency for business process approval. • Convert Canadian worker benefit contributions to USD for consolidated reporting with US benefit data. • Determine all worker bonuses in USD using the exchange rate in effect at the end of last year. • Display a worker's annual salary in EUR, regardless of how someone enters and stores it in Workday.
Convert Text to Number	Converts a text field number into numeric data so you can perform calculations on that number.	Convert text to a numeric value to perform calculations on: • A worker's length of service in years. • The 200 rows in an expense report.
Format Date	Extracts part of a date field and formats it as a text field.	• Determine the fiscal year and period of a worker's hire date. • Extract the month and day from a worker's birth date. • Group and summarize headcount activity by month. • List workers who have a birthday this month. • Produce a list of promotions by quarter.
Format Number	Formats a numeric field as a text field to use in concatenations, report notifications, and so on.	• Assign a proper decimal separator based on the locale of the user.

Calculated Fields	Description	Examples
		• Prefix the currency symbol. • Standardize the decimal precision.
Format Text	Removes or replaces special characters and delimiters in a single instance or text field. Changes the case of a single instance or text field to upper, lower, or proper case.	Change the case of a single instance or text field to upper, lower, or proper case to: • Configure proper formatting for postal entities, such as bulk mailings that require text to be in a specific format. • Format the text *MY NAME* to *My Name*. Replace the special character in the field *% Requisition Status* to *Job* so the formated field is *Job Requisition Status*. See Example: Create an Intersection.

Configure Constant Values

Calculated Fields	Description	Examples
Build Date	Enables you to create a new date or time field by using components from other fields or from specified values.	Determine the: • First day of the month in which a company hires a worker. • Last day of the fiscal year for a company. See Example: Track Balances Rolling Forward for Coordinated Leaves and Time Off.
Date Constant	Enables you to create a date, time, or time zone constant for use in other calculations.	• Compute headcounts or salaries as of 2017-01-01. • Determine how many new workers a company hired after a specified date.
Numeric Constant	Enables you to assign a numeric constant to a field so you can use it in other calculations.	• Compute a rolling window of time, such as 3 months. • Configure a currency multiplier as of a certain date for currency exchange rates. See Example: Set Up Parental Leave.

Calculated Fields	Description	Examples
Prompt for Value	Enables you to create a field to prompt users for a value when the report runs or for filter conditions.	Prompt the report runner to select: • A company to yield company-specific results. • The Time Off Type, such as *Unpaid* or *Sabbatical* instead of entering the values in a true/false condition calculated field.
Text Constant	Enables you to create a text constant for use in other calculations.	• Append text to a field value using a concatenate text calculated field. • Use the text *Highly Compensated* in an evaluate expression calculated field. • Prefix a worker's title, such as *Miss*, *Mr.*, or *Mrs.* before their full name in an evaluate expression calculated field.

Related Information

Concepts

Concept: Calculated Fields on page 512

Concept: Calculated Fields and Calculations on page 587

Reference

Reference: Calculations and Calculated Fields Comparison on page 606

Example: View Employee Data Changes with Reports-as-a-Service

This example illustrates how to create lookup value as of date calculated fields to use in an advanced report to view changes between 2 dates in Reports-as-a-Service outputs.

Context

You want to create a report that displays a list of employees who updated their primary work phone number in the past year. You then want to enable the report as a Workday Web Service and generate a URL so you can access the report results using an external reporting tool.

Prerequisites

Security: These domains in the System functional area:

- *Custom Field Management*
- *Custom Report Creation*

Steps

1. Access the Create Calculated Field task.

   Create a lookup value as of date calculated field for each date parameter.

   a) Enter *Primary Work Phone - From* on the Field Name field.
   b) Select *Worker* on the Business Object prompt.
   c) Select *Lookup Value As Of Date* on the Function prompt.
   d) Click OK.
   e) Select these values on the Calculation tab:

Prompt	Value
Source Field	*Phone - Primary Work*
Entry Date	*Prompt - Date 1*

   f) On the Additional Info tab, enter *Primary Work Phone Number value from Prompt - Date 1* on the Description field.
   g) Select *Address & Phone* on the Category prompt.
   h) Click OK.
   i) Click Create Another Calculation.
   j) Enter *Primary Work Phone - To* on the Field Name field.
   k) Select *Worker* on the Business Object prompt.
   l) Select *Lookup Value As Of Date* on the Function prompt.
   m) Click OK.
   n) Select these values on the Calculation tab:

Prompt	Value
Source Field	*Phone - Primary Work*
Entry Date	*Prompt - Date 2*

   o) On the Additional Info tab, enter *Primary Work Phone Number value from Prompt - Date 2* on the Description field.
   p) Select *Address & Phone* on the Category prompt.
   q) Click OK.
   r) Click Done.
2. Access the Create Custom Report task.

   Create an advanced report that displays a list of employees who changed their primary work phone number within the date parameters.

   a) Enter *Primary Work Phone Delta* on the Report Name field.
   b) Select *Advanced* on the Report Type prompt.
   c) Select the Enable As Web Service check box.
   d) Clear the Optimized for Performance check box.
   e) Select *Workers for HCM Reporting* on the Data Source prompt.
   f) Click OK.
   g) On the Columns tab, select *Worker* on the Field prompt.
   h) Enter *Worker Reference* on the Column Heading Override field.
   i) On the Filter tab, add a row to the Filter on Instances grid.
   j) Select these values on the grid:

Prompt	Value
Field	*Primary Work Phone - From*

Prompt	Value
Operator	*not equal to*
Comparison Type	*Value from another field*
Comparison Value	*Primary Work Phone - To*

k) On the Prompts tab, select the Populate Undefined Prompt Defaults check box.
l) For the *Prompt - Date 1* Field, enter *From Date* on the Label for Prompt field.
m) Select the Required check box for the field.
n) For the *Prompt - Date 2* Field, enter *To Date* on the Label for Prompt field.
o) Select the Required check box for the field.
p) Click OK.
q) From the related actions menu of the advanced report, select Web Service > View URLs.
r) Enter these dates:

Prompt	Value
From Date	*01/01/2019*
To Date	*01/01/2020*

s) Click OK.
t) Select CSV.
u) Open the downloaded CSV file in an external reporting tool, such as Microsoft Excel.

Result

The file displays a list of employees who changed their primary work phone number within the past year.

Next Steps

You can:

- Change the date parameters to list changes that occurred within the past 2 weeks, 6 months, and so on.
- Select different RaaS outputs to fit your business needs.

Related Information
Concepts
Concept: Calculated Fields on page 512
Concept: Reports as a Service (RaaS)
Tasks
Lookup Value as of Date on page 546
Create Custom Reports

Calculations

Setup Considerations: Calculations

You can use this topic to help make decisions when planning your configuration and use of calculations in Workday. It explains:

- Why to set them up.
- How they fit into the rest of Workday.
- Downstream impacts and cross-product interactions.

- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

A calculation in Workday performs a specific operation and delivers a result. The result can be a:

- Date.
- Numeric value.
- Boolean (true/false) response.

You can use calculations in Workday to derive numerical values (Example: Earnings, deductions, length of service), or to define business rules for particular processes (Example: Worker eligibility for a bonus or shift premium).

Business Benefits

- Workday calculations enable you to use Workday data to make business decisions, reducing the need to refer to other information sources.
- Workday delivers many standard calculations that are available for you to use. You can also create custom calculations to process information based on the unique needs of your business.
- Calculations in Workday are transparent. Calculation administrators can view the calculation conditions and operands to verify the setup.

Use Cases

Use cases for calculations vary, depending on the type of calculation and the Workday products that you use.

<table>
<tr><td>Product</td><td>Example Use Cases</td></tr>
<tr><td>Absence</td><td>If you hire a worker in or prior to the first period in the balance period, the worker accrues 16 hours; else 8 hours.
If a worker's years of service based on their continuous service date is:
Between 0-5 years, accrue 5 days.
Between 5-10 years, accrue 10 days.
Greater than 10 years, accrue 15 days.
Return TRUE if:
A worker is full-time as of period end date OR
Is full-time as of period start date AND terminated in the period.</td></tr>
<tr><td>Payroll</td><td>If shift = 3, then rate = (hourly rate + 2)
Determine if active withholding orders include child support.
Return TRUE if:
A worker was terminated as of the period start date, AND
Payroll input exists for the worker.</td></tr>
</table>

Product	Example Use Cases

Student	• If resident of Illinois, then tuition = 1200. If nonresident, then tuition = 1800.
	• Return TRUE if:
	    • A student's ACT score is greater than or equal to 28, AND
	    • Their admissions GPA is greater than or equal to 3.0.
	• Determine whether an academic period is Spring 2021.

Questions to Consider

Question	Considerations
How many calculations are you creating? How often are you processing them?	Workday recommends that you follow these guidelines to optimize processing time: • In a conditional calculation with multiple conditions, order the conditions from most restrictive to least. • In a logic calculation with an AND operator, put the least common operand first. When it has an OR operator, put the most common operand first. • Use advanced lookup tables when possible, as they're optimized to handle high processing volumes.
What kinds of data can you use as inputs in calculations?	You can use Workday-delivered report fields that have an authorized usage of *Calculation Engine (Payroll/Absence)* or other calculations. You can use custom fields as operands only in these calculation types: • Instance set comparison calculations. • Customer-owned instance value calculations.
What if you need to modify a calculation?	When calculation parameters or operands change, consider whether you can replace the calculation instead of modifying it. If you must modify an existing calculation, use caution. Calculations aren't effective dated, except for advanced lookup tables. Modifying existing calculations could have undesirable impacts on calculations that evaluate data in the past, such as retro pay in Payroll and Absence. Components that reference the calculations, such as earnings, deductions, time off plans, and accruals, are effective dated. You can replace the calculations in the components that use them and create a new effective date snapshot

Question	Considerations
	for the change. When replacing a calculation, create a new calculation by copying the existing calculation. Name both calculations so that it's clear that one replaces the other.
Which users will view, modify, and use calculations?	You can create a calculations administrator role, and assign those users security to maintain calculations. Because calculations can impact multiple products, and can use or generate sensitive or confidential data, ensure that any user with access to edit calculations understands the impacts.
Do you use more than 1 Workday product that uses calculations?	If yes, and different workers manage calculations for different products, consider setting up segmented security for calculations. Segmented security can prevent workers from accessing or using calculations from other product areas

Recommendations

- Before you create calculations, define a naming convention for them. Make sure that the name reflects what the calculation does, making it easier to select the correct calculation when you search. You can also use the Comments field to document the purpose and the logic of the calculation.
- Always search for an existing calculation before you create a new one.
- For best performance and maintainability, avoid creating large nested calculations when possible.
- Don't use a custom calculation in more than 1 product area. Changes that you make for 1 product might not apply to others. Instead, create separate calculations for each product.
- Change the name of inactive calculations so that it's clear that they're no longer in use.
- If you plan to use custom fields in calculations, review the requirements for using custom fields in calculations.

  Note: Workday only supports custom fields under specific conditions in calculations. See Concept: Requirements for Custom Fields in Calculations on page 588.
- For Payroll calculations: When you test custom calculations in a sandbox environment, check them for accuracy in both on-cycle and retro pay calculations.

Requirements

Assign each of your company-specific calculations to 1 or more product-specific categories. Use the category to identify the Workday products that use the calculation. Category can be used to limit access to calculations.

Limitations

- You can't edit, copy, or delete Workday-owned calculations.
- You can't combine AND and OR conditions in the same logic calculation. Instead, you can nest calculations by selecting a logic calculation as an operand of another logic calculation.

Tenant Setup

No impact.

Security

Domain	Considerations
• *Set Up: Calculations - Generic* domain in the Core Payroll functional area. • *Set Up: Time Off (Calculations - Generic)* domain in the Time Off and Leave functional area.	Users with security enabled for these domains can create, view, and edit calculations.
Access Calculation (Segmented) domain in the Core Payroll, Implementation, Payroll Interface, and Time Off and Leave functional areas	Users can configure access to calculations using segment-based security groups.
Set Up: Student Interim Calculation domain in the Financial Aid functional area.	Users with security enabled for this domain can create, view, and edit interim calculations.
Calculation: Delete domain in these functional areas: • Core Compensation • Core Payroll • Financial Aid • Time Off and Leave	Users with security enabled for this domain can delete calculations that aren’t in use.

Business Processes

No impact.

Reporting

You can use the All Calculations by Category report data source to create custom reports on calculations.

Reports or Dashboards	Considerations
All Calculations	Use to review calculations by category and type. You can view Workday-owned calculations, custom calculations, or both.
All [calculation type] Calculations	Use to review calculation details such as operands, conditions, and comments. You can view Workday-owned calculations, custom calculations, or both.
Calculation Exception Audit	Use this report to find calculations that: • Aren't used in Workday. • Have errors or warnings.
Evaluate Student Calculation	Use to test and review details for calculations in the Student or Common category.
Tenant Analyzer	Use to identify and fix payroll and absence calculations that don't meet Workday recommendations.

Integrations

Web Services	Considerations
Get Advanced Lookup Tables	Retrieves information about advanced lookup tables.
Put Advanced Lookup Table	Uploads advanced lookup table data. Can also update or delete data in existing advanced lookup tables.

Connections and Touchpoints

Features	Considerations
Absence	Time off plans, accruals, and time offs. • Specify eligibility criteria for the time off plan. • Calculate the accrual amount. • Calculate the maximum units allowed for the time off. Absence balances. Calculate values over a period of time (Example: Year-to-date) for: • Time off plan balances. • Accrued amounts. • Time off taken amounts.
Custom fields	When configured, you can use custom fields as inputs to calculations.
Payroll	Earnings and deductions. • Calculate the earning or deduction amount. • Specify worker eligibility criteria for the pay component. • Set up related calculations to retrieve values from other areas of Workday. Examples: Benefits, compensation, time off, time tracking, tax withholding. Pay accumulations. Calculate a total by adding or subtracting the values of: • Earnings and deductions. • Other pay accumulations. • Pay component groups. • Pay component related calculations. Pay balances. Calculate values over a period of time (Example: Year-to-date) for: • Earnings and deductions. • Pay accumulations. • Pay component groups. • Pay component related calculations. Pay component groups. Calculate a total by adding the values of a set of earnings and

Features	Considerations
	deductions in a pay period. To subtract, use a pay accumulation or an arithmetic calculation.
Financial Aid	Calculate amounts for: • Student award items. • Student cost items: cost calculation and full-time full-year Pell cost basis. Specify eligibility for: • Student award items. • Student cost item assignments. • Student need packaging strategy assignments. • Student merit packaging strategy assignments. Calculate the minimum cumulative GPA for satisfactory academic progress.
Student Financials	Calculate amounts for: • Student charge items. • Student waiver items. • Student fee groups: course fee amounts and additional fee amounts. • Student sponsor contracts: disbursement amounts. Specify eligibility for: • Student waiver items. • Student sponsor contracts: disbursement eligibility. • Student charge item assignments. • Student registration-based fee assignments.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Create Calculations

Prerequisites

Understand the available types of numeric, date, and boolean calculations that you can create.

Security:

- *Set Up: Calculations - Generic* domain in the Core Payroll functional area.
- *Set Up: Time Off (Calculations - Generic)* domain in the Time Off and Leave functional area.
- To configure access to calculations using segment-based security groups: *Access Calculation (Segmented)* domain in the Core Payroll, Implementation, Payroll Interface, and Time Off and Leave functional areas.

Context

You can create calculations to define complex business rules for particular processes in:

- Absence Management
- Compensation
- Student
- Workday Payroll

Workday also delivers many standard calculations.

Steps

1. Search for View [calculation type] to verify that a duplicate calculation doesn't already exist.

   To create a new calculation by copying and editing similar one, select Calculation > Copy from the related actions menu of the calculation.
2. Search for Create [calculation type].
3. Select the Category.

   Workday recommends not modifying calculations in other categories because doing so might negatively affect other Workday products.
4. As you complete the task, consider:

Type of Calculation	Performance Guidelines
Conditional Calculation	To optimize performance when setting multiple conditions, define the Order from the most restrictive condition to the least restrictive.
Logic Calculation	Depending on the Operator, order your operands differently: • *AND* operator: Put the least common operand first. • *OR* operator: Put the most common operand first.

Result
You can view calculations in the All Calculations report.

Next Steps
Access the Calculation Exception Audit report to find calculations that:

- Aren't used.
- Have related errors or warnings.

Access the Delete Calculation task to delete a calculation that isn’t in use. See the Usage tab on the calculation to determine if and where it is in use. The tab doesn't display if it's not in use.

Related Information
Concepts
Concept: Payroll Calculations
Concept: Calculated Plans for Compensation
Concept: Absence Calculations
Concept: Student Calculations
Reference
Reference: Date Calculations on page 598
Reference: Numeric Calculations on page 600

Reference: Boolean Calculations on page 604

Create Lookup Calculations Using Advanced Lookup Tables

Prerequisites

Security:

- *Set Up: Calculations - Generic* domain in the Core Payroll functional area.
- *Set Up: Time Off (Calculations - Generic)* domain in the Time Off and Leave functional area.
- To configure access to calculations using segment-based security groups: *Access Calculation (Segmented)* domain in the Core Payroll, Implementation, Payroll Interface, and Time Off and Leave functional areas.

Context

Advanced lookup calculations can handle high volumes, and provide 1 place to update data for easy maintenance. They also enable you to assign an effective date for search and return values. You can define search criteria based on:

- Instance or text report fields.
- Numeric calculations.
- Text type calculations.

Note: You can create lookup calculations with basic lookup tables; however, Workday recommends using advanced lookup tables for effective dating and optimized performance.

You can use these web services to retrieve or load advanced lookup tables:

- *Get Advanced Lookup Tables*
- *Put Advanced Lookup Table*

Steps

1. Access the Create Lookup Table task to define the search criteria for a lookup table. As you complete the task, consider:

Option	Description
Advanced Lookup Table - Report Field Search Criteria	The lookup table returns values based on the results of a single-instance or multi-instance report field. Example: To create a lookup table that stores values based on different job profiles, select *Job Profile (or Override if exists) as of Period End Date* as the Report Field Search Criteria.
Advanced Lookup Table - Numeric Calculation Search Criteria	The lookup table returns values based on the results of numeric calculations. Example: Select *Worker Years of Service (based on Continuous Service Date) as of Period End Date* as the Numeric Search Criteria. You can then create a lookup table that stores values based on the years of service, as calculated from the continuous service date.
Advanced Lookup Table - No Search Criteria (default value only)	The lookup table returns default values.

Option	Description
	Example: Create a lookup table for calculation parameters that change regularly, and manage the changes with effective dating.
Advanced Lookup Table - Text Report Field Search Criteria	The lookup table returns data based on the results of a text report field. Example: To create a lookup table that stores values for different cities, select *Primary Work Address - City* as the Report Field Search Criteria.

Remove any empty rows from the Values grid, and click Ok to create the lookup table.

2. Access the Lookup Table > Column Labels task from the related actions menu of the lookup table.

   Enter a Display Name and select Display on Page for each type of data you want to manage in the lookup table.

   Workday adds a column in the lookup table for the type of data you define.
3. Access the Lookup Table > Edit task from the related actions menu of the lookup table.

   Create a row for each set of values and enter the Search Value and the return values for each column. As you complete the task, consider:

Advanced Lookup Table	Description
Report Field Search Criteria Text Report Field Search Criteria	Workday returns only exact matches or default values. If there's no match or default, Workday doesn't return anything. Workday is case-sensitive when identifying matches. To designate a default, leave the Search Value field on the first row blank, and select the Default check box.
Numeric Calculations Search Criteria	If there's no exact match for the search value, Workday returns a value that is closest to the search value but less than the search value.

4. Access the Create Lookup Calculation task.

   Enter the Lookup Table, and the Column you're creating this calculation for. For Workday Payroll and Absence Management, select the Period Date Indicator for the table effective dates.

   Create a new lookup calculation for each column you created in the lookup table.

Create Multicriteria Advanced Lookup Table

Prerequisites

Security:

- *Set Up: Calculations - Generic* domain in the *Core Payroll* functional area.
- *Set Up: Time Off (Calculations - Generic)* domain in the *Time Off* and *Leave* functional area.
- To configure access to calculations using segment-based security groups: Access Calculation (Segmented) domain in the *Core Payroll*, *Implementation*, *Payroll Interface*, and *Time Off* and *Leave* functional areas.

Multicriteria advanced lookup calculations can handle high volumes, and provide 1 place to update data for easy maintenance.

You can define search criteria based on:

- Instance or text report fields.
- Numeric calculations.
- Text type calculations.

Example: Retrieve pay rates based on several criteria such as union, location, department, or worktag.

Workday recommends using multicriteria advanced lookup tables to reduce the number of calculations and steps required for complex operations, improving efficiency.

You can use these web service operations (secured to the *Set Up: Payroll (Calculations - Generic)*, and *Set Up: Time Off (Calculations - Generic)* domains) to retrieve or load multicriteria advanced lookup tables:

- *Put Multicriteria Lookup Table*
- *Get Multicriteria Lookup Tables*

Steps

1. Access the Create Multicriteria Advanced Lookup Table task. As you complete the task, consider:

Option	Description
Name	Enter a name for the table.
Category	Select a category type. Example: Payroll.

2. In Overview, confirm the Name and Category fields and click Next.
3. As you configure Search Criteria, consider:

Option	Description
Name	Enter a name for the row.
Search Criteria Type	Select a type for the row: • Numeric Calculation Search Criteria - If there's no exact match for the search value, the calculation stops and nothing is returned. • Text Report Field Search Criteria - Workday returns only exact matches or default values. If there's no match or default, Workday doesn't return anything. Workday is case-sensitive when identifying matches. • Report Field Search Criteria - Select a business object related to the report field. If there's no match or default, Workday doesn't return anything. Workday is case-sensitive when identifying matches. You can use Custom Worktags as a business object in the multicritieria advanced lookup table.
Business Object	Enabled when Report Field Search Criteria is selected. Select a Business Object from the list.

   Add up to 5 search criteria and click Next.

4. In Column Labels, enter information for the output columns of your table and click Next.

5. As you configure Values, consider:

Option	Description
Effective Date	Enter the effective date for your table.
Search Criteria	The criteria names appear as column headings. Depending on the search criteria type, select a report field or enter a value. For Numeric Calculation Search Criteria, Workday uses a range. • *From* is equal to and greater than the selected value. • *To* is less than the selected value. Select the Any Other Value check box when you want a value other than the indicated search value..

Once the Search Criteria in a multicriteria advanced lookup table is created, it is fixed and can't be edited. To make changes to search criteria definitions, you need to create a new multicriteria advanced lookup table.

6. In Review and Submit, click OK.

Example

Next Steps

Create a lookup calculation for each column you created in the multicriteria advanced lookup table.

Create a pay component for your data and then Run Pay Calculation to verify that the returned values are correct, based on the different criteria.

Related Information

Examples

Example: Multicriteria Advanced Lookup Table Customized Allowances for Payroll on page 596

Create Lookup Calculations for Multicriteria Advanced Lookup Tables

Prerequisites

Create a multicriteria advanced lookup table.

Security:

- *Set Up: Calculations - Generic* domain in the Core Payroll functional area.
- *Set Up: Time Off (Calculations - Generic)* domain in the Time Off and Leave functional area.
- To configure access to calculations using segment-based security groups: *Access Calculation (Segmented)* domain in the Core Payroll, Implementation, Payroll Interface, and Time Off and Leave functional areas.

Context

Multicriteria lookup calculations can handle high volumes of data, and provide 1 place to update data for easy maintenance. They also enable you to assign an effective date for search and return values. Lookup calculations are an integral part of multicriteria advanced lookup tables.

Steps

1. Access the Create Lookup Calculation task.
2. Enter a name for the calculation and select the same category as your multicriteria advanced lookup table. Example: Payroll.
3. In the *Calculation* section, from Lookup Table, select your multicriteria advanced lookup table.
4. Select the Column for the lookup calculation.
5. Select Period Date Indicator for Lookup Calculation for the table effective dates for Workday Payroll and Absence Management.

   You can select *Based on a Custom Date* and select an option in Date Calculation.
6. In the *Multicriteria Search Items* grid, select the Calculation Value for each search criteria.

   For report field search criteria or text report search criteria, you can only select class report fields available with the business object you selected in your multicriteria advanced lookup table.

   For numeric calculation search criteria, select an existing calculation or create a new calculation.
7. Create a lookup calcuation for each column label in the multicriteria advanced lookup table.

Related Information
Examples
Example: Multicriteria Advanced Lookup Table Customized Allowances for Payroll on page 596

Copy Advanced Lookup Tables with New Effective Dates

Prerequisites

Create an advanced lookup table or a multicriteria advanced lookup table.

Security:

- *Set Up: Calculations - Generic* domain in the Core Payroll functional area.
- *Set Up: Time Off (Calculations - Generic)* domain in the Time Off and Leave functional area.
- To configure access to calculations using segment-based security groups: *Access Calculation (Segmented)* domain in the Core Payroll, Implementation, Payroll Interface, and Time Off and Leave functional areas.

Context

You can create multiple copies of a snapshot of a lookup table, each with a different effective date and different values.

For Workday Payroll and Absence Management, the period date indicator from the lookup calculation determines which lookup table snapshot to use. Example: You can create calculations based on the period start date, or payment date.

When evaluating a lookup calculation Workday compares the period date indicator to the effective-dated snapshots of the lookup table. Workday uses the most recent snapshot that is on or before the calculation's period date indicator. When you process a lookup calculation in retro payroll calculations, Workday uses the period date indicator, but based on the retro period dates.

Example: You create a lookup table for payroll calculations with 2 effective dates:

- January 1.
- February 1.

When you process a payroll period of January 1 - January 31, with a payment date of February 2, Workday uses these snapshots:

Period Date Indicator of the Lookup Calculation	Effective-Dated Snapshot Used
Payment Date	February 1st
Period End Date	January 1st

Steps

1. Access the View Lookup Table task, and select an advanced lookup table.
2. From the related actions menu of the effective date on the lookup table, select Effective Date > Copy.
3. Enter a New Effective Date for the snapshot copy.
4. Access the Edit Lookup Table task to modify the copy of the lookup table. We recommend that you don't edit lookup tables while performing any payroll processing tasks to improve performance.

   Examples:

   - Add and delete rows and columns.
   - Change the search and return values for the copy

Create a Step-Based Calculation

Prerequisites

Security:

- *Set Up: Calculations - Generic* domain in the Core Payroll functional area.
- *Set Up: Time Off (Calculations - Generic)* domain in the Time Off and Leave functional area.
- To configure access to calculations using segment-based security groups: *Access Calculation (Segmented)* domain in the Core Payroll, Implementation, Payroll Interface, and Time Off and Leave functional areas.

See: Steps: Enable Functional Areas and Security Policies.

Context

You can create a step-based calculation to define multiple steps and operations within 1 calculation that return a single, numeric value. Example: You want to provide hourly workers bonuses based on the cost of living in their state.

Note: Step-based calculations aren't supported in multicriteria advanced lookup tables.

Workday produces a numeric value as the result of each step, and then uses that value in the next step. You can define:

- Conditions to apply to each step.
- Condition groups to group multiple steps together.
- The order of the steps.

Steps

1. Access the Create Step Based Calculation task.
2. (Optional) Complete these fields to define conditions for an operation:

Option	Description
Condition Group	Select the same value for all conditions that you want to group together. When you define a condition group, Workday evaluates all

Option	Description
	conditions of the same group, in the order listed until a condition is met. Workday then: • Executes the operations associated with the condition. • Bypasses the remaining rows in the condition group. If no conditions within the group are met, Workday skips the step and moves to the next step.
Condition	Select the condition that must be met for Workday to execute the operations associated with the step. You can specify multiple conditions. For optimized performance, when you use: • AND logic, put the least common condition first. This practice enables Workday to move immediately to the next condition or step when the value doesn't meet the condition. • OR logic, put the most common condition first. This practice enables Workday to execute the step and immediately move on.

3. Define the operations to execute in the step:

Option	Description
Operation	Select the type of operation. Examples: Add, multiply.
Type	Select the type of information you want to provide in the Value column. Available options in the Type field vary based on the value you selected in the Operation field. Example: Rounding Definition is only available to select in the Type field if you selected Round in the Operation field. Select: • *Calculation* to specify a calculation. • *Date Difference* to specify a start and end date (calculation or date) to calculate the difference between the 2 dates in days, months, or years. • *Date Extract* to specify a calculation that extracts either the day, month, or year . • *Lookup table* to specify an advanced lookup table, column, and period date indicator. • *Numeric* to enter direct numeric constant values.

Option	Description
	• *Prior Value* to use the prior value as the input. • *Rounding Definition* to use a rounding definition.

Related Information

Examples

Example: Create a Step-Based Calculation for Bonuses Based on Cost of Living

Example: Create a Step-Based Calculation for Recreation Center Fees

Example: Create a Step-Based Calculation for Enterprise Award Amounts

Concept: Step-Based Calculation

Step-based calculations return a single numeric value. You can use them in scenarios involving complex logic such as nested calculation flows.

Operations

Within each step, you can specify any number of operations that Workday executes sequentially. For each operation, you can also specify how you want to provide the value. Example: Using a calculation or numeric value.

Operation	Description
Add	Adds the value that you specify to the prior value.
Divide	Divides the prior value by the value that you specify.
Exit	Exits the calculation with either: • A numeric value. • The most recent prior value. • The result of a specified calculation. • The result of a date difference operation. • The result of a date extract operation.
Max	Returns the maximum of all specified values. When you select *Calculation* from the Type prompt, you can configure Workday to ignore the prior value in the comparison. To do so, select the Exclude Prior Value check box.
Min	Returns the minimum of all specified values. When you select *Calculation* from the Type prompt, you can configure Workday to ignore the prior value in the comparison. To do so, select the Exclude Prior Value check box.
Multiply	Multiplies the prior value by the value that you specify.
Power	Applies a power operator to the Value in the preceding row.
Round	Enables you to specify a rounding option.

Operation	Description
Set	Initializes a starting value, typically at the beginning of the calculation. When you don't set an initial value, Workday starts the calculation with the value zero. You can use the set operation to reinitialize the previous prior value.
Subtract	Subtracts the value that you specify from the prior value.

Example: Set

Set the initial value to 100.

Operation	Type	Value
Set	*Numeric*	100

Example: Multiply

Multiply the prior value by the value of a monthly transportation subscription, which you store in an advanced lookup table.

Operation	Type	Value - Lookup Table	Value - Column	Value - Period Date Indicator
Multiply	*Lookup Table*	*Transportation subscription allowance*	*Monthly*	*Based on Payment Date*

Example: Power

Add a power operator to the preceding value for Set of 2.

Operation	Type	Value
Set	Numeric	2
Power	*Numeric*	*0.5*

The calculation returns 1.4142.

Example: Min

Return the minimum between the prior value, the worker's age, and 15 years.

Operation	Type	Value
Min	*Calculation*	*15* *Worker age*

Example: Exit

Exit the calculation with a result of the prior value.

Operation	Type
Exit	*Prior Value*

Example: Add

Add the age of the worker as of the end of the period.

Operation	Type	Value – Start Date Type	Value – Start Date Calculation	Value – End Date Type	Value – End Date Calculation	Value Returned
Add	*Date Difference*	*Calculation*	*Worker: Hire Date*	*Calculation*	*Period: Period End Date*	*Year*

Conditions

You can specify a condition to control if Workday should resolve a step or not.

You can copy step-based conditions by selecting Condition > Copy from the related actions menu of the condition.

Example: Prior Value <= 1500

You want the step to resolve only when the prior value inherited from the previous step is less than or equal to 1500.

Operand 1	Operator	Operand 2
Prior Value	*is less than or equal to*	*Calculation* > 1,500

Example: Worker Hire Date >= Period Start Date

You want the step to resolve only when the worker's hire date is greater than or equal to the period start date.

Operand 1	Operator	Operand 2
Calculation > *Worker Hire Date*	*greater than or equal to*	*Calculation* > *Period: Period Start Date*

Worker Years of Service > 20 (at end of period) AND Worker Hire Date Month = Month of Period

You want the step to resolve only when both the worker's:

- Start date is greater than 20 years by the period end date.
- Hire date month is the same month of the period end date.

Logical Operator = *AND*

Operand 1	Operator	Operand 2
Type: *Date Difference* Start Date Type: *Calculation*	*greater than*	Type: *Numeric* Value: *20*

Operand 1	Operator	Operand 2
Start Date Calculation: *Worker: Hire Date* End Date Type: *Calculation* End Date Calculation: *Period: Period End Date* Value Returned: *Year*		
Type: *Date Extract* Date Calculation: *Worker: Hire Date* Value Returned: *Month*	*equal to*	Type: *Date Extract* Date Calculation: *Period: Period End Date* Value Returned: *Month*

Condition Groups

You can specify the order of conditions when there are multiple rows of conditions.

Example: Extra Hours Based on PTO Balance

You want to give workers with the least amount of personal time off (PTO) balance some extra hours. Workers with larger PTO balances get fewer extra hours. You set up this step-based calculation:

Step	Condition Group	Condition	Operator	Type	Value
1			*Set*	*Calculation*	*Current PTO balance (hours)*
			Add	*Calculation*	*PTO (Position Based) Plan*
			Round	*Rounding Definition*	*Round down*

Step	Condition Group	Condition	Operator	Type	Value
					to nearest 1
2.1	Prior Value Condition Group	Prior Value <= 100	*Add*	*Numeric*	*25*
2.2	Prior Value Condition Group	Prior Value <= 200	*Add*	*Numeric*	*15*
2.3	Prior Value Condition Group	Prior Value <= 300	*Add*	*Numeric*	*10*
2.4	Prior Value Condition Group	Prior Value > 300	*Add*	*Numeric*	*5*

Workday evaluates the steps based on the step order. A worker who has less than 100 receives 25 extra hours. A worker who has more than 300 receives 5 extra hours.

Concept: Planning Calculations

You can use calculations either as building blocks for other calculations or to perform operations in a standalone capacity. As a best practice, fully plan out your calculations before building them in your tenant. Consider following these steps to design and build calculations.

Gather business requirements.	Determine the goal of the calculation. What do you want to accomplish? Are you determining eligibility or assigning an amount?
Map out the design.	Determine what types of calculations you need to meet each part of the business requirements. You might find it helpful to write out the hierarchy of calculations physically on a whiteboard or a sheet of paper.
Devise a naming convention.	A naming convention helps you communicate the scope and purpose of calculations, identify related calculations, and share calculations across functional areas. Examples: Consider names like *1000* or *Is Student Resident?* for simple building block calculations.

For more specific calculations, consider using abbreviations to communicate attributes of the calculation in its name, such as its intended functional area. Example: Many schools maintain separate sets of calculations for Financial Aid and Student Financials.

Examples:

Acronyms and Abbreviations	Meaning
FA	Financial Aid
SF	Student Financials
AC	Arithmetic calculation
AGC	Aggregate calculation
CC	Conditional calculation
ISC	Instance set comparison calculation
LC	Logic calculation
UG	Undergraduate
GR	Graduate
UNIT	Credits/Units

Based on the example, the name for an arithmetic calculation that calculates a per credit rate of 100 for undergraduate students would be *SF AC UG 100/UNIT*.

Determine reference IDs for calculations.

Establish requirements and conventions for reference IDs for all of your calculations. Although Workday automatically generates a reference ID if you don't configure one, the automatically generated reference IDs might be difficult for you to interpret and manage.

Build the calculations in a sandbox environment.

If you’re new to building calculations, Workday recommends building calculations from the bottom up. Build the lowest and most heavily nested calculations first and then work your way up to the highest calculations. Many people find this approach more intuitive and comfortable regardless of their level of expertise with calculations.

If you’re experienced with calculations, you can consider building calculations from the top down. Build the highest-level calculations first and work your way down. Use placeholder calculations as you build out the design and replace the placeholders as you create the lower-level calculations. You might find this approach useful when many lower-level calculations already exist in

	your tenant or if this perspective is more logical to you.
Test thoroughly in a sandbox environment.	Write out a number of different scenarios that use the calculation and the expected results. Compare the expected results with the actual results of the calculation and resolve any differences before implementing the calculations in a production environment. Anticipate errors and exceptions. Recommendation for Student calculations: The most effective way to test for expected results is to test the calculation on students who fit the criteria for the calculation. You might need to work with a student records administrator to identify the best students to test various calculations on.
(Optional) Copy calculations.	Save time and improve consistency by copying similar calculations instead of building each calculation from scratch. From the related actions menu of the calculation, select Calculation > Copy. You can also copy snapshots of advanced lookup tables, each with their own effective date and values.

Related Information

Concept: Calculated Fields and Calculations

In Workday you can create calculations using either:

- Calculated fields.
- Calculations.

You can't interchange these frameworks.

Calculated Fields

Calculated fields are configurable field definitions that are associated with a business object and that use Workday data. You can use calculated fields to perform arithmetic calculations, create logical and conditional expressions, and transform your data. Calculated fields can be report-specific or tenant-wide and you can use them on:

- Business processes to control condition steps.
- Entry validations to evaluate data.
- Integrations, such as with connectors and Enterprise Interface Builders (EIBs).
- Notifications sent to all workers and new hires.
- Reports to create related calculated fields and add them to custom reports.
- Schedules for recurring processes to determine dynamically when they run.

Calculations

You can create numeric, boolean, and date calculations that work with these Workday features:

- Absence Management: Accruals and time off plans.
- Compensation: Compensation plans.
- Student: Awards, costs, limits, eligibility, and financial aid.

- Workday Payroll: Pay accumulations and balances, earnings and deductions, and pay component groups.

Recommendations

When creating a calculation, design it based on either:

- Workday-delivered report fields.
- Custom fields.

  Note: Workday only supports custom fields under specific conditions in calculations. See Concept: Requirements for Custom Fields in Calculations on page 588.

Requirements for Inputs to Calculations

When you do need to use a calculated field as an input to a calculation:

- Only use Lookup Value as of Date calculated fields.
- Base the calculated field on the *Worker* business object.
- Only use calculated fields as inputs to an instance set comparison calculation.

For Payroll or Absence lookup calculations, select the Data As Of as either the:

- Period start date.
- Period end date.
- (Payroll only) Subperiod date.

These requirements also apply to any nested calculated fields. Example: You can't create a calculated field based on the *Worker* business object that references a calculated field based on a different business object.

When creating a calculated field for calculations, set the:

- Category to a functional area. Examples: *Time Off*, *Payroll*.
- Authorized Usage as *Calculation Engine (Payroll/Absence)*.

Related Information

Concepts

Concept: Calculated Fields on page 512

Reference

Reference: Calculations and Calculated Fields Comparison on page 606

Concept: Requirements for Custom Fields in Calculations

You can create custom fields to retrieve data for Workday calculations. You can use custom fields as inputs to these calculations:

- Instance set comparison.
- Instance value.

Requirements

When you use a custom field as an input to a calculation, the custom field must be on a custom object that:

- Extends the noneffective-dated *Worker* business object.
- Is single-instance.

When creating a custom field for calculations, ensure that you set:

- The Category to a functional area. Examples: *Time Off*, *Payroll*.
- The Authorized Usage as *Calculation Engine (Payroll/Absence)*.

To add data to a custom field to use it in a calculated field, access Additional Data > Edit on the worker's related actions menu.

Instance Set Comparison Calculations

When you use a custom field as an input to instance set comparison calculations, the custom field must be a list type.

Instance Value Calculations

When you use a custom field as an input to a calculation, the custom field must be 1 of these field types:

- Boolean.
- Date.
- Decimal.
- Integer.

You can then use the instance value calculation as an input to:

- A value comparison calculation.
- Any type of custom date calculation. Example: Date Increment/Decrement.
- A feature configuration. Example: You can select the instance value calculation from the Calculation prompt on the Edit Deduction or Edit Earning task.

Related Information
Tasks
Steps: Create Custom Fields for Payroll and Absence Calculations

Concept: Data Entry in Advanced Lookup Table EIB Spreadsheets

To create or update advanced lookup tables, you can create an Enterprise Interface Builder (EIB) based on the *Put Advanced Lookup Table* web service. You can then enter data in a spreadsheet that corresponds to the inbound EIB and upload it to Workday. Using an EIB can save time and improve accuracy when updating large tables.

Security

Make sure that users have *Get* and *Put* integration permissions on these domains:

Domain	Permissions
Set Up: Calculations – Generic in the Core Payroll functional area. *Set Up: Time Off (Calculations – Generic)* in the Time Off and Leave functional area.	Users assigned to 1 or both of these domains can update advanced lookup tables.
Access Calculation (Segmented) domain in the Core Payroll, Implementation, Payroll Interface, and Time Off and Leave functional areas	Users can configure access to calculations using segment-based security groups.

Domain	Permissions
Integrations: EIBs in the Integrations functional area.	Users assigned to this domain can launch EIBs.

Minimize Integration Processing Time

Before you upload the table data to Workday, remove from the spreadsheet any effective-dated snapshots:

- That you didn't change.
- That you don't want to update.

The snapshots that you remove from the spreadsheet remain intact in Workday when you upload new data.

Note: The spreadsheet must include all rows in the effective-dated snapshots you're updating, even if some rows don't change. When you add rows to an existing snapshot, the spreadsheet must include all existing rows.

For best performance, Workday recommends that you limit the number of rows in an advanced lookup table to 15,000 across all snapshots.

Spreadsheet Key Column

The Spreadsheet Key column identifies each advanced lookup table in the spreadsheet. The rows associated with a particular advanced lookup table all have the same spreadsheet key.

- When there's only 1 advanced lookup table, copy the spreadsheet key to each new row you add to the spreadsheet.
- When you create a new lookup table, enter a new Spreadsheet Key for all of its associated spreadsheet rows.

Row ID Columns

Use the 3 Row ID columns in the spreadsheet when you add data to an existing advanced lookup table.

Spreadsheet Section	Row ID Identifies	How to Update Row ID
Column Data	The columns in the advanced lookup table.	Increment the Row ID value for each column that you add to an advanced lookup table. All snapshots in an advanced lookup table must have the

	<table><tr><th>Spreadsheet Section</th><th>Row ID Identifies</th><th>How to Update Row ID</th></tr><tr><td></td><td></td><td>same number of columns.</td></tr><tr><td>Snapshot Data</td><td>Each effective-dated snapshot in the advanced lookup table.</td><td>Assign the same Row ID value to each spreadsheet row associated with a snapshot.</td></tr><tr><td>Row Data</td><td>The advanced lookup table rows in the associated snapshot, in the order created.</td><td>Increment the Row ID value for each row that you add to an advanced lookup table snapshot. When you create a new snapshot, assign incremental Row ID values to each advanced lookup table row.</td></tr></table>
Lookup Table Row Instance Column	Workday assigns a unique ID to each row in an advanced lookup table. When you create a spreadsheet with advanced lookup table data, these IDs display in the Lookup Table Row Instance column. When you add rows to the spreadsheet, Workday recommends that you leave this column empty. Workday assigns the IDs when you upload the spreadsheet data.
Delete Snapshot and Delete Row Columns	Use these columns to delete data from an advanced lookup table. • To delete a snapshot: Select Y in the Delete Snapshot column next to the effective date you want to delete. • To delete a row: Select Y in the Delete Row column next to the lookup table row instance.

Related Information
Tasks
Set Up Inbound EIB

Generate EIB Spreadsheet Template

Reference

2021R2 What's New Post: Mass Update Advanced Lookup Tables

Example: Set Up an Integration for Advanced Lookup Tables

This example illustrates 1 way to configure an inbound integration for advanced lookup table data.

Context

You maintain a large advanced lookup table called *Union Dues by Position* that you need to update each year. You want to create an EIB integration that will enable you to:

- Generate a spreadsheet that contains the advanced lookup table data.
- Update the data on the spreadsheet.
- Upload the data to Workday.

Prerequisites

Security:

- *Integration Build* domain in the Integration functional area.
- *Integrations: EIBs* domain in the Integration functional area.
- *Set Up: Calculations – Generic* in the Core Payroll functional area.
- *Set Up: Time Off (Calculations – Generic)* in the Time Off and Leave functional area.
- To configure access to calculations using segment-based security groups: *Access Calculation (Segmented)* domain in the Core Payroll, Implementation, Payroll Interface, and Time Off and Leave functional areas.

Steps

1. Access the Create EIB task.
2. Enter these values:

Field	Enter
Name	*Union Dues EIB*
Inbound	Select this option.

3. Click OK.
4. On the Get Data tab, select these settings:

Field	Enter
Retrieval Method	*Attach File at Launch*.
Web Service Operation	*Put Advanced Lookup Table (Web Service)*.

5. Click Next through the remaining tabs, then click Close.
6. Access the View Integration System report for the *Union Dues EIB* integration system.
7. From the related actions menu, select Template Model > View.
8. Click Edit Template Model Sheet.

9. Select the Separate Type Column check box and clear the Reference ID Type field for these columns:
    - Lookup Table Category
    - Context Instance
    - Search Criteria ID
    - Numeric Search Criteria ID
    - Report Field Search Value

    By adding the separate type columns, you:

    - Save data entry time by generating the necessary ID values.
    - Can update multiple advanced lookup tables with different values in these columns in a single spreadsheet.
10. Click OK, then click Done.
11. On the View Template Model report, scroll down and click Edit Template with Data Options.
12. Select Condition Rule Filter.
13. In the Rule Conditions grid, select these values:

Field	Select
Source External Field or Condition Rule	*Lookup Table Name*
Relational Operator	*In the selection list*
Comparison Value	*Union Dues by Position*

14. Click OK.
15. Access the View Integration System report for the *Union Dues EIB* integration system.
16. From the related actions menu, select Template Model > Generate Spreadsheet Template.
17. Select Generate Spreadsheet with Data.
18. Click Submit.

Result

Workday generates a spreadsheet that includes all the data from the *Union Dues by Position* advanced lookup table.

Next Steps

You can update the spreadsheet by:

- Adding a new effective-dated snapshot.
- Updating table values.
- Adding rows or columns to the table.
- Selecting snapshots or rows to delete.

Use the Launch / Schedule Integration task to upload the updated table values to Workday.

Related Information

Concepts

Concept: Data Entry in Advanced Lookup Table EIB Spreadsheets on page 589

Tasks

Customize EIB Spreadsheet Template

Generate EIB Spreadsheet Template

Launch EIB Spreadsheet Upload

Reference

FAQ: EIB Spreadsheet Templates

2021R2 What's New Post: Mass Update Advanced Lookup Tables

Example: Create Lookup Tables for Job-Specific Values

This example illustrates how to use advanced lookup tables to manage calculations values that vary for different types of jobs.

Context

For Global Modern Services (GMS) the Operations, Sales, and Research and Development departments have different shift allowance rates for:

- Day shifts.
- Afternoon shifts.
- Night shifts.

Because GMS changes these values frequently and you use them in multiple calculations, you want to store them in a single table with effective dating.

Prerequisites

Security:

- *Set Up: Calculations - Generic* domain in the Core Payroll functional area.
- *Set Up: Time Off (Calculations - Generic)* domain in the Time Off and Leave functional area.
- To configure access to calculations using segment-based security groups: *Access Calculation (Segmented)* domain in the Core Payroll, Implementation, Payroll Interface, and Time Off and Leave functional areas.

Steps

1. Access the Create Lookup Table task and select Advanced Lookup Table - Report Field Search Criteria.

   Select these values:

Option	Value
Name	Shift Allowance by Job Family
Category	*Payroll*
Report Field Search Criteria	*Job Family Groups (or Override if exists) as of Period End Date*
Effective Date	Enter today's date.

   Remove any rows from the Values grid, and click Ok to create the lookup table.
2. Access the Lookup Table > Column Labels task from the related actions menu of the lookup table.

   To display 3 columns on the lookup table, add these rows:

Display on Page	Display Name
Selected	Day Shift Allowance Rate
Selected	Afternoon Shift Allowance Rate
Selected	Night Shift Allowance Rate

3. Access the Lookup Table > Edit task from the related actions menu of the lookup table.

   Add these rows:

Search Value	Day Shift Allowance Rate	Afternoon Shift Allowance Rate	Night Shift Allowance Rate	Default
	2	5	8	Selected
Operations	3	5	10	
Sales	4	6	10	
Research & Development	4	7	12	

4. Access the Create Lookup Calculation task.
   a) Enter these values:

Option	Value
Name	Day Shift Allowance Rate
Category	*Payroll*

   b) In the Calculation grid, add a row with these values:

Lookup Table	Column	Period Date Indicator
Shift Allowance by Job Family	*Day Shift Allowance Rate*	*Based on Period End Date*

5. Access the Create Lookup Calculation task, and create a similar lookup calculation for the *Afternoon Shift Allowance Rate*, and *Night Shift Allowance Rate* columns.

Example: Create Custom Report for Available Report Fields

This example illustrates how to build a custom report that lists report fields that are available to use in calculations.

Context

At Alma Mater University, Julie Winston is responsible for creating and maintaining financial aid calculations. A custom report enables her to reference an up-to-date list of available report fields as she designs and builds the calculations. Julie collaborates frequently with Valerie Rodriguez, who is responsible for student financials calculations, and wants to her to have access to the report as well.

Prerequisites

Security: *Custom Report Creation* domain in the System functional area.

Steps

1. Access the Create Custom Report task.
2. Enter or select these values:

Field	Value
Report Name	*Financial Aid Report Fields for Calculations*
Report Type	*Advanced*
Optimized for Performance	Clear this check box.

Field	Value
Data Source	*Fields*

3. Click OK.
4. Add these rows to the grid on the Columns tab:

Business Object	Field
Field	*Field*
Field	*Business Object*
Field	*Description*

5. On the Filter tab, add these rows to the Filter conditions for filtering on instances grid:

And/Or	(	Field	Operator	Comparison Type	Comparison Value	)
And		*Categories*	*any in the selection list*	*Value specified in this filter*	*Financial Aid*	
And		*Authorized Usage*	*any in the selection list*	*Value specified in this filter*	*Calculation Engine (Payroll/ Absence)*	

6. On the Share tab, grant Valerie Rodriguez permissions to the report.
   a) Select Share with specific authorized groups and users.
   b) In the Authorized Users prompt, select *Valerie Rodriguez*.

      If you're building this report on behalf of Julie, add her here too.
7. Click OK.
8. Click Run.

Result

The *Financial Aid Report Fields for Calculations* report lists the report fields in the Financial Aid category that Julie can use in calculations for financial aid. Valerie also has access to this report and can use it as a reference for her own calculations as needed.

Related Information
Tasks
Create Custom Reports

Example: Multicriteria Advanced Lookup Table Customized Allowances for Payroll

This example illustrates how to configure a customized allowance table based on:

- Organization
- Job profile
- Seniority

Context

In addition to regular payroll updates at Global Modern Services, you want to configure a customized allowance incorporating 3 criteria related to employee retention.

Workers in certain organizations with different job profiles and seniority receive a range of allowances, depending on defined criteria.

Prerequisites

Security:

- *Set Up: Calculations - Generic* domain in the Core Payroll functional area.
- *Access Calculation (Segmented)* domain in the Core Payroll functional areas to configure access to calculations using segment-based security group.

Steps

1. Access the Create Multicriteria Advanced Lookup Table task.
2. Enter *Customized Allowance* and select Payroll from Category.
3. In the Search Criteria section, enter the following in the grid:

Name	Search Criteria Type	Business Object
Organization	Report Field Search Criteria	Supervisory Organization
Job Profile	Report Field Search Criteria	Job Profile
Seniority	Numeric Calculation Search Criteria	

4. Click Next.
5. In the Column Labels section, enter the column name for returned results for the table:

Display On Page	Display Name
Selected	*Carer Allowance*
Selected	*Housing Allowance*
Selected	*Wellbeing Allowance*

6. Click Next.
7. In Values, enter *08/01/2025* in Effective Date and complete the grid:

Organization	Job Profile	Seniority	Carer Allowance	Housing Allowance	Wellbeing Allowance
Research & Development (France)	Research Assistant	0-5	100	200	50
Research & Development (France)	Research Assistant	5-10	150	250	75
Research & Development (France)	Senior Researcher	0-5	150	300	50
Research & Development (France)	Senior Researcher	5-10	200	350	75
Research & Development (UK)	Research Assistant	0-5	90	150	50
Research & Development (UK)	Research Assistant	5-10	120	200	75
Research & Development (UK)	Senior Researcher	0-5	100	175	50

Research & Development (UK)	Senior Researcher	5-10	150	250	75

8. Click Next.
9. Review the criteria and click OK.
10. Access the Create Lookup Calculation task.
11. Enter *Carer Calc* in Name and select *Payroll* from Category.
12. In the Calculation grid, select *Customized Allowance* from Lookup Table.
13. Select *Carer Allowance* from Column and *Based on Period End Date* from Period End Date Indicator for Lookup Calculation. In the Multicriteria Search Items grid, add these values:

Name	Calculation Value
Organization	Supervisory Organization as of Period End Date
Job Profile	Job Profile (Compensation)
Seniority	Years since Hire (based on Pay Input)

14. Click Done.
15. Access the Create Lookup Calculation task, and create a lookup calculation for each column in the multicriteria advanced lookup table.

Related Information

Tasks

Create Multicriteria Advanced Lookup Table on page 575

Reference: Date Calculations

These calculations return a date.

Security:

- *Set Up: Calculations - Generic* domain in the Core Payroll functional area.
- *Set Up: Time Off (Calculations - Generic)* domain in the Time Off and Absence functional area.
- To configure access to calculations using segment-based security groups: *Access Calculation (Segmented)* domain in the Core Payroll, Implementation, Payroll Interface, and Time Off and Leave functional areas.
-

Name	Description	Examples	Tips
Build Date Calculation	Builds a date by combining a year, month, and day.	• Current fiscal year start date. Current year anniversary date for a worker. • Based on a given year, define a month of 12, and a day of 31 to return the year-end date.	To configure the year, month, and day values, you can: • Use constant value calculations. • Extract the value from a date in Workday using a date extract calculation.
Conditional Calculation	Returns a date based on if statements.	If payment date is between 2020-07-01 and 2020-12-31, then	You must use an instance set comparison calculation, instance value

Name	Description	Examples	Tips
		fiscal year-end date = 2021-06-30.	calculation, logic calculation, or value comparison calculation as the condition. When you configure multiple conditions, Workday: • Uses the first condition that is True. • Reorders the rows according to the values in the Order field after you save the calculation.
Constant Date Calculation	Returns a defined constant date.	• Define a constant date of 2021-07-01 to use in other calculations. • Calculate actual load statuses as of a constant date calculation instead of the actual enrollment usage start date.	Name the calculation after the date value to make it easier to find. Example: *2021-07-01*.
Date Increment/ Decrement Calculation	Starts with a date and adds or subtracts years, months, or days to return another date.	Add 30 days to the worker or student's start date.	You can use instance value calculations, conditional calculations, build date calculations, or constant date calculations in date increment/decrement calculations.
Instance Value Calculation (Date)	A calculation that returns a date. In addition to a date, it can also return currency, and boolean attributes. • Workday-delivered IVCs return dates based on report fields. • Customer-owned IVCs return	Return the current period start date or period end date. Return the worker's hire date, termination date, or continuous service date.	You can use the All Instance Value Calculations report to access a list of available IVCs and view details about each calculation, such as: • The report field or custom field that the IVC is based on and its business object. • Any comments that describe the

Name	Description	Examples	Tips
	dates based on custom fields.		type of data that the IVC returns. • Related instances of the IVC.

Note: Date Difference and Date Extract calculations, while related to dates, return a numeric value.

Related Information

Concepts

Concept: Payroll Calculations

Concept: Calculated Plans for Compensation

Concept: Absence Calculations

Concept: Student Calculations

Reference: Numeric Calculations

These calculations return a numeric value.

Security:

- *Set Up: Calculations - Generic* domain in the Core Payroll functional area.
- *Set Up: Time Off (Calculations - Generic)* domain in the Time Off and Leave functional area.
- To configure access to calculations using segment-based security groups: *Access Calculation (Segmented)* domain in the Core Payroll, Implementation, Payroll Interface, and Time Off and Leave functional areas.
-

Calculation	Description	Examples	Tips
Aggregate Calculation	Returns the sum, average, minimum, or maximum of 2 or more values. Can also return the sum, average, minimum, or maximum value based on instances of a report field.	• Sum of all time off for a given period. • Number of child dependents under 18 years of age. • Calculate the maximum of student and parent adjusted gross income.	You can use previously defined calculations that return a number, such as constant value calculations or instance value calculations (numeric), as operands. If you don't specify rounding: • Absence and Payroll: The calculation supports up to 6 decimal points, except for the main calculation on a pay component. Unless otherwise configured, the amount of a

Calculation	Description	Examples	Tips
			pay component rounds: • Up to the nearest 0.01 for earnings. • To the nearest 0.01 for deductions. • Student: The calculation automatically rounds to the nearest 0.01.

Arithmetic Calculation	Adds, subtracts, divides, or multiplies 2 (and only 2) values.	• Rate multiplied by hours.
		• Total units multiplied by per unit cost.
			You can use previously defined calculations that return a number, such as constant value calculations or instance value calculations (numeric), as operands.
			If you don't specify rounding:
			• Absence and Payroll: The calculation supports up to 6 decimal points, except for the main calculation on a pay component. Unless otherwise configured, the amount of a pay component rounds:
			  • Up to the nearest 0.01 for earnings.
			  • To the nearest 0.01 for deductions.
			• Student: The calculation automatically

Calculation	Description	Examples	Tips
			rounds to the nearest 0.01.
Conditional Calculation	Returns a value based on 1 or more IF statements.	• If cost center = A, then value = 20. • If resident of Illinois, then value = 1200. If nonresident, then value = 1800.	You must use an instance set comparison calculation, instance value calculation, logic calculation, or value comparison calculation as the condition. When you configure multiple conditions, Workday: • Uses the first condition that is True. • Reorders the rows according to the values in the Order field after you save the calculation.
Constant Value Calculation	Returns a defined constant value.	• Define a constant value of 15 to use in other calculations. • Overtime multiplier = 1.5. • The minimum GPA for satisfactory academic progress.	Constant value calculations are very common and likely to already exist when you need them. Before creating a new constant value calculation, use the All Constant Value Calculations report to see whether a value already exists for your category. If a constant value calculation with the desired value exists, but in a different category, consider creating another calculation with the same value in your category.
Date Difference Calculation	Returns the number of days, months, or years (the interval) between 2 dates.	• The worker or student age as of a given date. • Number of days in the current month.	Date difference calculations with an interval of Day don't include the ending date. Example: January 1 to January 15 returns 14 days, not 15.

Calculation	Description	Examples	Tips
			To include the ending date, create an additional arithmetic calculation to add 1 to the result of the date difference calculation. You can use instance value calculations, conditional calculations, build date calculations, or constant date calculations in date difference calculations.
Date Extract Calculation	Parses the year, month, or day from a date and returns a number.	• The year of a payment date. • The month of a worker or student's birth date.	
Instance Value Calculation (Number)	A calculation that returns a value. In addition to numeric values, it also returns currency, boolean, and date attributes. • Workday-delivered IVCs return values based on report fields. • Customer-owned IVCs return values based on custom fields.	• The full-time equivalent for a worker's job. • The admitted GPA from a student's admission application.	You can use the All Instance Value Calculations report to access a list of available IVCs and view details about each calculation, such as: • The report field or custom field that the IVC is based on and its business object. • Any comments that describe the type of data that the IVC returns. • Related instances of the IVC.
Lookup Calculation	Looks up 1 value based on another value.	• Paid time off accrual rate. • Hourly rate based on years of service. • Tuition by academic level and residency status.	Create lookup calculations after lookup tables so that the calculation can reference the columns in the lookup table.
Step-Based Calculation	Returns a single numeric value that's the	• Calculate the 401(k) match	You can copy a step-based calculation,

Calculation	Description	Examples	Tips
	outcome of a series of calculations. Workday begins with the first calculation, which yields a number, then uses that number in the next step, and so on, to arrive at a final single value. Conditions and condition groups control whether Workday executes a step.	amount for a period based on employee deductions and limits. • Calculate union dues per period based on union and other worker demographics. • Calculate state-mandated sick time accrual based on state and other worker demographics.	but not a step-based calculation condition.

Related Information

Concepts

Concept: Payroll Calculations

Concept: Calculated Plans for Compensation

Concept: Absence Calculations

Concept: Student Calculations

Reference: Boolean Calculations

These calculations return a true (1) or false (0) indicator.

Security:

- *Set Up: Calculations - Generic* domain in the Core Payroll functional area.
- *Set Up: Time Off (Calculations - Generic)* domain in the Time Off and Leave functional area.
- To configure access to calculations using segment-based security groups: *Access Calculation (Segmented)* domain in the Core Payroll, Implementation, Payroll Interface, and Time Off and Leave functional areas.

Name	Description	Examples	Tips
Logic Calculation	Used to build boolean calculations with and/or logic. Returns true for AND statements, if all conditions are true. Returns true for OR statements, if one or more conditions are true.	• Management level is Individual contributor OR FTE < 100%. • A worker was terminated as of the period start date AND payroll input exists for the worker. • Test score is greater than 35 AND student is nonresident.	• Conditional calculations frequently use logic calculations as criteria. • You can't directly combine AND and OR conditions directly in the same logic calculation. You can, however, nest calculations by selecting a logic calculation as an operand

Name	Description	Examples	Tips
			of another logic calculation. • You can't use a conditional calculation as one of the calculations inside a logic calculation.
Instance Set Comparison Calculation	Compares a report field or a custom field and a value or set of values using a relational operator such as: • *Exact match with the selection list* • *In the selection list* • *Is empty* • *Is not empty* • *Not in the selection list*	• Worker isn't an hourly worker. • Active withholding orders include child support. • An academic period is Spring 2017.	• Use the *in the selection list* relational operator instead of *exact match with the selection list*. The *exact match with the selection list* relational operator can yield inaccurate results. • Instance set comparison calculations are mainly used as a condition within a conditional calculation or a logic calculation. • You can also use instance set comparison calculations as eligibility on pay and absence components.
Instance Value Calculation (Boolean)	A calculation that returns a boolean from a field. In addition to a boolean, it can also return currency, and date attributes. • Workday-delivered IVCs return values based on report fields. • Customer-owned IVCs return values based on custom fields.	• Payroll Input (Onetime) Exists for Pay Component (Sub Period). • Active state tax levy orders exist for a worker. • The academic period is standard.	You can use the All Instance Value Calculations report to access a list of available IVCs and view details about each calculation, such as: • The report field or custom field that the IVC is based on and its business object. • Any comments that describe the

Name	Description	Examples	Tips
			type of data that the IVC returns. • Related instances of the IVC.
Value Comparison Calculation	Compares 2 operands using a relational operator, such as: • *Equal to* • *Greater than* • *Greater than or equal to* • *Less than* • *Less than or equal to* • *Not equal to*	• The month of a worker's hire date is later than July. • A worker has wages eligible for pension deductions. • A student's GPA is greater than or equal to 3.0.	• Value comparison calculations compare only numeric data, including dates, and are mainly used as a condition in conditional calculations or logic calculations. • You can also use value comparison calculations in a standalone capacity as eligibility calculations.

Related Information

Concepts

Concept: Payroll Calculations

Concept: Calculated Plans for Compensation

Concept: Absence Calculations

Concept: Student Calculations

Reference: Calculations and Calculated Fields Comparison

Several functions in calculations and calculated fields are similar, but have some differences.

Note: Calculations and calculated fields are separate frameworks. You can't interchange them.

For calculations:

- Workday organizes and secures calculations through an assigned category, which determines which Workday product the calculations apply to.
- Workday accesses report field data through instance value calculations, instance set comparison calculations, and advanced lookup tables.

For calculated fields:

- Workday builds calculated fields around an assigned business object.
- Workday accesses data through report fields on the business object or calculated fields.

Comparison

This section compares calculations and calculated fields that have similar functions to help you understand their differences.

Arithmetic Calculations

Function	Description	Considerations
Arithmetic calculation	Performs functions between only 2 values.	You can only perform 1 operation between 2 operands with an arithmetic calculation. For multiple operations, you can create multiple calculations nested within one another. The arithmetic calculation supports these operators: • Add • Divide • Multiply • Subtract If you don't specify rounding, Workday automatically rounds the result to the nearest 1/100th (.01).
Arithmetic Calculation calculated field	Returns the calculation of multiple values.	You can use arithmetic calculation to perform these calculations: • Add • Divide • Multiply • Subtract The calculated field: • Can manage more

Function	Description	Considerations
		than 2 values. • Enables you to use parentheses. • Enables you to specify the currency code. • Returns zero on error.
Step-Based calculation	Returns a single numeric value that's the outcome of a series of calculations done in steps.	You can define conditions and condition groups for each step. Available operations are: • Add • Divide • Exit • Max • Min • Multiply • Round • Set • Subtract

Build a Date

Function	Description	Considerations
Build Date calculation	Creates a new date by combining a year, month, and day.	The year month and days values are constant values. To extract the values from a date in the Workday, you can create a date extract calculation to use as an input.

Function	Description	Considerations
Build Date calculated field	Enables you to create a new date or time field by using components from other fields or from specified values.	As opposed to the build date calculation, the calculated field: • Includes the option to extract date or time values from a date in Workday. • Includes time (hour, minute, second, and millisecond) and time zone. • Returns blank on error.

Calculate a Future or Past Date

Function	Description	Considerations
Date Increment/ Decrement calculation	Starts with a date and adds or subtract years, months, or days to return another date.	To create the initial start date, you must define an instance value calculation or use 1 provided by Workday.
Increment or Decrement Date calculated field	Computes a date that's a number of days, months, or years before or after the value of a date field.	The increment or decrement date calculated field can add or subtract hours, minutes, seconds, and

Function	Description	Considerations
	Adds or subtracts a number of hours, minutes, seconds, and milliseconds to or from a date.	milliseconds to or from a date.

Return a Constant Value or Date

Function	Description	Considerations
Constant Date calculation	Returns a defined constant date.	
Date Constant calculated field	Enables you to create a date, time, or time zone constant so that you can use it in other calculations.	The date constant calculated field: • Includes time (hour, minute, second, and millisecond). • Enables you to define a time zone.
Constant Value calculation	Returns a defined constant value.	
Numeric Constant calculated field	Enables you to assign a numeric constant to a field so that you can use it in other calculations.	The numeric value can be an integer or a real number.

Return a Value Based on Conditions

Function	Description	Considerations
Conditional calculation	Evaluates a series of conditions and returns a date or value	You must use 1 of these calculations as the condition:

Function	Description	Considerations
	associated with the first condition that is true. If no conditions are true, the calculation returns a default value.	• Instance comparison. • Logic. • Value comparison.
Evaluate Expression calculated field	Groups and transforms data by evaluating a series of boolean conditions and returning the value associated with the first condition that's true. If no conditions are true, the calculated field returns the default value.	You must have existing fields for the evaluated conditions and values.
Evaluate Expression Band calculated field	Specifies values for boolean conditions and returns grouped instances.	You must have existing fields for the evaluated conditions.

Lookup

Function	Description	Considerations
Lookup calculation	Looks up 1 value based on another value.	Unlike the evaluate expression and evaluate expression band calculated fields: • You must create a separate lookup

Function	Description	Considerations
		table for lookup calculations. • You can assign effective dates to search and return values. Advanced lookup tables can have search criteria of: • Instance report fields. • Numeric calculations. • Text report fields.
Lookup Related Value calculated field	Returns the value of a field on a related business object.	You can promote fields from a related business object to the primary business object so you can perform these actions on the fields: • Filter • Group • Report • Sort • Summarize

Extract Instance Values

Function	Description	Considerations
Instance Value calculation	Returns a boolean, currency, date, or numeric value by retrieving	Only returns 1 value.

Function	Description	Considerations
	values for an instance.	
Extract Single Instance calculated field	Extracts a single instance from a multi-instance field based on boolean conditions.	
Extract Multi-Instance calculated field	Returns multiple instances of a related business object based on a condition. Extracts multiple instances from a related business object based on boolean conditions.	

Calculate the Difference Between Dates

Function	Description	Considerations
Date Difference calculation	Returns the interval between 2 dates in days, months, or years.	
Date Difference calculated field	Returns the intervale between 2 dates or times in years, months, days, hours, minutes, or seconds.	Unlike the date difference calculation, the date difference calculated field: • Includes time (hour, minute, and second).

Function	Description	Considerations
		• Returns zero on error. • Can ignore lower-level date components. Example: You can determine if Workday considers days and time when finding the date difference for a month.

Extract a Portion of a Date as a Number

Function	Description	Considerations
Date Extract calculation	Returns the year, month, or day from a date as a number.	Limited to day, month, or year. You must enter the date to parse as an instance value calculation.
Format Date calculated field	Returns part of a date field as a text field.	• Enables you to define a custom format. • Includes additional predefined formats, such as fiscal periods. • Includes time (hour,

Function	Description	Considerations
		minute, and second).

Compare Values

Function	Description	Considerations
Instance Set Comparison calculation	Compare a report field or a custom field and a value or set of values using a relational operator.	
Value Comparison calculation	Compare 2 operands using a relational operator.	You can use a value comparison calculation to compare results from different instance value calculations or against a constant value calculation. This calculation only compares numeric data.
True/False Condition calculated field	Returns True or False based on boolean conditions.	Enables you to build directly in the calculated field comparisons between: • Values. • Existing fields. This calculation compares numeric and non-numeric data.

True/False

Function	Description	Considerations
Logic calculation	Returns True or False based on boolean conditions. Returns True for AND statements, if all conditions are true. Returns True for OR statements, if 1 or more conditions are true.	You must have predefined comparisons such as: • Value comparison calculations. • Instance value calculations. • Instance set comparison calculations.
True/False Condition calculated field	Returns True or False based on boolean conditions.	Enables you to build directly in the calculated field comparisons between: • Values. • Existing fields. This calculation compares numeric and non-numeric data.

Related Information

Concepts

Concept: Calculated Fields on page 512

Concept: Calculated Fields and Calculations on page 587

Troubleshooting: Calculations

Unable to select a calculated field as an input to an instance set comparison calculation.

Cause: Your calculations include an unsupported calculated field. Workday only supports calculated fields under specific conditions in calculations. See Concept: Calculated Fields and Calculations on page 587.

Solution: Redesign your calculation to avoid using unsupported fields. You can either:

- Create Calculations on page 572

  Redesign your calculation based on a Workday-delivered report field.

- Create a custom instance value calculation based on a custom field.

  See Concept: Requirements for Custom Fields in Calculations on page 588.

Custom calculation has slow performance.

Cause: You're using a calculated field as an input to the calculation. Workday only supports calculated fields under specific conditions in calculations. See Concept: Calculated Fields and Calculations on page 587.

Solution: Redesign your calculation to avoid using unsupported fields. You can either:

- Create Calculations on page 572

  Redesign your calculation based on a Workday-delivered report field.
- Create a custom instance value calculation based on a custom field.

  See Concept: Requirements for Custom Fields in Calculations on page 588.

Workday ignores or incorrectly applies a custom calculation.

You created an instance set comparison calculation for an eligibility rule in a payroll, absence, student, or compensation feature.

Cause: You're using a calculated field as an input to the calculation. Workday only supports calculated fields under specific conditions in calculations. See Concept: Calculated Fields and Calculations on page 587.

Solution: Redesign your calculation to avoid using unsupported fields. You can either:

- Create Calculations on page 572

  Redesign your calculation based on a Workday-delivered report field.
- Create a custom instance value calculation based on a custom field.

  See Concept: Requirements for Custom Fields in Calculations on page 588.

Duplicate Management Framework

Setup Considerations: Duplicate Management

You can use this topic to help make decisions when planning your configuration and use of duplicate management. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Duplicate management is a framework that enables you to find and merge records for persons with duplicate records in your Workday tenant.

Business Benefits

Duplicate management enables you to:

- Save time and money by eliminating confusion associated with multiple records for the same person.

- Simplify record management by having a single record for an individual.
- Increase efficiency by automatically merging duplicate records.
- Lower your maintenance costs as a result of fewer records to manage.

Use Cases

- Set up rules to match persons based on personal data and contact information.
- Review potential duplicate records and examine each one to gain insight about the data.
- Enable automatic merges for persons who match exactly on specific criteria such as email address or date of birth.
- Merge multiple records at once and remove multiple duplicate records at once.
- Merge various combinations of person types.

Questions to Consider

Questions	Considerations
After you merge 2 records, do you need to take any action on the source records?	Once you merge a source person to a target person, you can no longer take action on the source, except to unmerge it.
How do you determine the source and target person for the merge?	Workday determines the source and target based on the hierarchy of person types. Workday sets the highest person type in the hierarchy as the target.
Does the data associated with the target person remain the same?	No. Workday compares each personal data field and determines which data to keep or append.
Why does Workday prevent some merges?	Workday prevents merges when: • Workday doesn't support the person-type combination for merge. • The source person has an in-progress event.
Are additional configuration steps required to set up the duplicate management framework in other functional areas in Workday?	Review the Workday Administrator Guide for information on setting up duplicate management in Workday Recruiting and Workday Student.

Recommendations

Before you adopt the Duplicate Management Framework, we recommend that you formulate real-world test scenarios where you might find duplicate records.

Test different match rules and different numbers of match rules to determine the volume of duplicate records in your tenant.

Evaluate if the rules surface duplicates for different person types in your tenant based on your match criteria.

Analyze your test data to determine the state of the data in your tenant. This information can help you set a schedule for running the find duplicates job.

Requirements

You must opt in to the Duplicate Management Framework.

Limitations

- You can't merge all combinations of person types.
- You can't automatically merge a chain of duplicate records.

Tenant Setup

By opting in to the Duplicate Management Framework, you:

- Implement a tenant-wide change that you can't repeat or undo.
- Automatically opt out of the legacy match and merge functionality in Workday Recruiting and Workday Student.

Security

Configure these domains in the Duplicate Management functional area before you opt in to Duplicate Management:

Domain	Considerations
Manage: Duplicate Records for a Person	Enables constrained and unconstrained access to identify and manage duplicate records.
Manage: Duplicate Records for the Tenant	Enables unconstrained access to identify and manage duplicate records.
Set Up: Duplicate Management	Enables administrators to set up match rules and schedule match jobs.

Business Processes

No impact.

Reporting

Report	Considerations
Manage Duplicate Records	Enables you to view duplicate pairs based on your match rules and to take action on the record. You can merge records or remove duplicate records. For Mass Actions, the limits are: • Merge Records: 1000 records. • Remove as Duplicate: 10,000 records.
Manage Merged Records	Enables you to view merged records and to unmerge them.
Manage Removed Records	Enables you to view the details of all removed duplicate pairs based on you configured match rules.
View Automatic Merge Job Details	Enables you to view the details of the most recent automatic merge job, including the number of records automatically merged, and reasons for prevented automatic merges.
View Scheduled Runs for Find Duplicates	Enables you to view jobs set to run in the future.

Integrations

No impact.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Tasks

Steps: Set Up Duplicate Management for Applicants, Prospects, and Students

Merge or Link Duplicate Candidates

Reference

The Next Level: Discover the Duplicate Management Framework

The Next Level: Explore the Unified Duplicate Management Framework for Workday Student

Steps: Set Up Duplicate Management

Prerequisites

Review setup considerations for duplicate management.

Security: These domains in the Duplicate Management functional area:

- *Set Up: Duplicate Management*
- *Manage: Duplicate Records for a Person*
- *Manage: Duplicate Records for the Tenant*

Context

Duplicate Management enables you to identify, view, and merge duplicate records for the same person in Workday.

Steps

1. Enable the Duplicate Management functional area.

   See Steps: Enable Functional Areas and Security Policies.
2. Access the Opt-In to Duplicate Management task.

   You must opt in to use the Duplicate Management Framework.
3. Configure a security policy on the *Manage: Duplicate Records for the Tenant* domain to identify who can use Duplicate Management.

   This security policy enables access to these reports:

   - Manage Duplicate Records.
   - Manage Merged Records.
4. Create Match Rules on page 621.
5. Find Duplicate Records in the Tenant on page 623.
6. Merge Duplicate Records on page 624.

Result

You can view duplicate records in your tenant and decide whether to merge or remove them.

Next Steps

Access the Manage Match Rules task to set up match rules.

Related Information

Reference

2020R2 What's New Post: Duplicate Management Framework

Create Match Rules

Prerequisites

Enable the Duplicate Management functional area.

Opt in to Duplicate Management.

Security: *Set Up: Duplicate Management* in the Duplicate Management functional area.

Context

You can use match rules to identify duplicate person records in Workday. Example: Create a match rule that identifies person records with the same email and date of birth. Workday matches when both persons have the same date of birth, and any instance in common of the same email address.

You can't delete or modify rules that are in use on a matched or merged record. You can't modify a match rule while the Schedule Find Duplicates Job runs.

Steps

1. Access the Manage Match Rules task.
2. As you complete the task, consider:

Option	Description
Enabled	Workday only uses enabled rules to match person records.
Match Criteria	Select components for Workday to use to match person records. Select at least 1 of: • Address • Date of Birth • Email • Name - All • Name - Basic • National ID - All • National ID - Basic • Phone • Previous Worker ID If you select Date of Birth, you must select at least 1 additional match criteria because multiple persons can have the same date of birth. For all other match criteria, including Name, you can match only on the single match criteria.
Automatic Merge Enabled	Select this check box when you want to merge the records automatically and don't need to review the identified matches. When you enable automatic merge, you can't preview the duplicate persons or confirm the

Option	Description
	merge. Before enabling a rule for automatic merge, assess how it might impact your integrations and other functional areas.
Rule Name	(Optional) Create a name for your match rule.
Person Types Excluded from Automatic Merge	(Optional) When you enable at least 1 rule for automatic merge, select 1 or more person types to exclude from the automatic merge process.
Employee Merge Options	Select an option: • *Append data from source* to add any different data on the source to the target employee record. • *Don't append data from source* to leave any different data on the source record.
Match Exclusion Criteria	Select components for Workday to exclude from evaluation for a match: • Email Address • Name When you configure placeholder data in your tenant that you don't intend to merge, you can create a rule to exclude it. Example: If you have different persons with the same placeholder email address, you can exclude it from evaluation as a match because you know that those persons aren't duplicates. When you exclude data based on name, the Exclude only Required Components. check box, which is selected by default, enables you to exclude any names with the required name components for a country. Example: When the country is United States, the names Emily Smith and Emily A. Smith are excluded because first name and last name are the required components. When you clear the check box, Workday excludes fewer records because they must match exactly on all name components. To apply your match exclusions, create a new match rule or edit an existing one before you run the Schedule Find Duplicates Job task.

3. Run the Schedule Find Duplicates Job task to have your changes take effect. Workday evaluates all records again to find duplicates.

Related Information

Reference

Reference: Match Rules on page 626

2023R1 What's New Post: Duplicate Management Framework

Find Duplicate Records for an Individual

Prerequisites

Enable the Duplicate Management functional area.

Opt in to Duplicate Management.

Configure match rules.

Security: These domains in the Duplicate Management functional area:

- *Set Up: Duplicate Management*
- *Manage: Duplicate Records for a Person*

Context

You can search for duplicates of an individual person based on your configured match rules.

Steps

1. Select Duplicate Management > Find Duplicates from the related actions menu of a person's profile.

   View all potential duplicates for the person and merge or remove them.
2. (Optional) Click Search for Person to Merge when the search results don't return a duplicate that you know exists.

   To find the duplicate record, select the person's country and enter other search criteria. Workday displays records based on your security permissions. You can view details of potential duplicates and any reasons Workday prevents the merge. When you find the particular duplicate, select the check box and click Merge.

Related Information

Reference

2021R1 What's New Post: Duplicate Management Framework

Find Duplicate Records in the Tenant

Prerequisites

Enable the Duplicate Management functional area.

Opt in to Duplicate Management.

Configure match rules.

Security: These domains in the Duplicate Management functional area:

- *Set Up: Duplicate Management*
- *Manage: Duplicate Records for the Tenant*

Context

You can search for duplicate records in your tenant based on your configured match rules.

Steps

1. Access the Schedule Find Duplicates Job.

   Select the run frequency for the job to search for duplicates in your tenant.
2. Run the job now or select a future time.

   Enter any request name and schedule information.

3. (Optional) Access the View Scheduled Run for Find Duplicates to see scheduled jobs.
4. (Optional) View the Access the Manage Duplicate Records report to view potential duplicates that you can merge or remove.

Related Information
Reference
2021R1 What's New Post: Duplicate Management Framework

Merge Duplicate Records

Prerequisites

Enable the Duplicate Management functional area on the Maintain Functional Areas task.

Opt in to Duplicate Management.

Configure match rules.

Find duplicate person records.

Security: These domains in the Duplicate Management functional area:

- *Set Up: Duplicate Management*
- *Manage: Duplicate Records for a Person*
- *Manage: Duplicate Records for the Tenant*

Context

You can view details about duplicate persons, merge their records, and remove them as needed.

Steps

1. Access the Manage Duplicate Records report to see potential duplicate persons in your tenant, based on your configured match rules.

   Filter duplicate persons by:

   - Automatic merge prevent conditions.
   - Automatic merge prevented.
   - Match person type.
   - Match rule.
   - Match rule strength.
   - Merge conditions.
   - Number of duplicates.
2. Select a record and click a person's name.

   The View Person Duplicate Record grid displays the criteria on which they match.
3. Take action on duplicate records:

   Click Merge to merge a single source record to a target record. You can preview the record that will be active after the merge. If Workday prevents the merge, resolve any prevent merge reasons before proceeding. You can't resolve all prevent merge reasons. Example: Workday doesn't support worker-to-worker merges.

You can merge duplicate records simultaneously for persons with a single matching record, but you can't preview the record before merging. Workday displays the number of records merged and any records it can't merge.

Click 1 or all of:

- View Details to see additional details about the person who has a potential duplicate.
- Remove as Duplicate to eliminate a record as a match in future searches. As a mass action, you can remove multiple records as duplicates simultaneously.
- Undo Remove as Duplicate to undo the action of removing a duplicate. You can then match the record again.
- Attempted for Automatic Merge to display records that didn't merge and the reasons Workday prevented the merge. You can sometimes manually merge a match record that didn't automatically merge.

4. (Optional) Access the Edit Universal ID for Merge Source Person task.

   If needed, update the universal ID on a source after a merge. This enables you to correct information that might prevent you from unmerging the records, and to reassign data to make it available elsewhere in Workday.
5. (Optional) Access the Manage Merged Records report to view the list of merged records.

   Workday displays the word (Merged) after each person's name. Click the name to view the details of the merged records in the View Merged Records for Person grid. Click Unmerge to undo a merge. A confirmation message indicates that the unmerge is complete, with 1 of these statuses:

   - The records are no longer duplicates when you updated the originally merged records or changed the match rules.
   - Workday created a potential duplicate for the originally merged records. In this case, you can rematch the unmerged records.
6. (Optional) Access the View Automatic Merge Job Details report to view the details of the most recent automatic merge job.

   Workday displays the number of records automatically merged, and reasons for prevented automatic merges.
7. (Optional) Access the Manage Removed Records report to view the list of removed records.

   Workday displays the details of removed duplicate pairs based on your configured match rules. From this report you can access the Undo Remove as Duplicate Mass Action task to undo removing multiple records. The records become available for matching again.

Related Information

Reference

Reference: Merge Operations on page 630

Reference: Unmerge Operations on page 677

Concept: Duplicate Management

The Duplicate Management Framework enables you to identify and remove duplicate records for the same person in Workday. A person with multiple person types, such as pre-hire, candidate, contingent worker, has multiple records in Workday. Configurable match rules enable you to find duplicate person records based on your match criteria. You can then review the duplicate records and merge them into a single record or remove the redundant ones.

The Duplicate Management Framework supports HCM, Workday Recruiting, and Workday Student. You can configure match and merge rules to accommodate person types specific to those functional areas.

Workday identifies duplicate records as:

- Source: The records that you want to merge.

- Target: The record into which you want to merge the source.

Before merging source and target records, Workday compares their data values. When the values match, Workday considers the records functionally equivalent. After the merge, Workday no longer displays data from the source record and you can no longer act on the source person except to unmerge the records.

Automatic Merge

Workday enables you to merge duplicate records automatically when:

- You can manually merge the match record because there are no reasons to prevent the merge.
- Neither person has a person type excluded from automatic merge on the Manage Match Rules task.
- The persons match on a match rule with the Automatic Merge Enabled check box selected on the Manage Match Rules task.
- The persons who match on a match rule with Automatic Merge Enabled on the Manage Match Rules task are a 1-to-1 match. They match exactly to each other and to no one else.

When the records don't meet all match criteria, Workday doesn't automatically merge them. The records remain available for manual merge.

Automatic merge depends on the completion of the process that finds duplicate records. This ensures that all 1-to-1 matches are found. When the process completes, Workday starts the automatic merge process and attempts to merge all duplicate records in the tenant until it reaches the limit of 10,000 records. When there are more than 10,000 duplicate records, Workday processes them after the completion of the next process that finds duplicate records. When all duplicate records are processed for automatic merge, another automatic merge process starts and attempts to merge any records that were previously processed.

Prevented Merges

Workday prevents merges of some combinations of person types, and any merge that could change data incorrectly. For merges with employee or contingent worker person types as the target, you can:

- Append data from the source that doesn't match the target.
- Leave data on the source.

Workday retains all existing personal information on employees and contingent workers, and doesn't modify or delete it.

Related Information

Tasks

Steps: Set Up Duplicate Management for Applicants, Prospects, and Students

Merge or Link Duplicate Candidates

Reference

Reference: Supported Person Type Combinations for Merge on page 628

2021R1 What's New Post: Duplicate Management Framework

Reference: Match Rules

This topic describes how Workday matches on selected criteria.

Criteria	Description
Address	Both persons have an address that matches on country and all address components.
Date of Birth	Both persons have the same date of birth.
Email	Both persons have a matching email address. Matches are based on:

Criteria	Description
	• Primary home email address. • Primary work email address. • Additional email addresses. Example: Previous work email address from a job application.
Name - All	Both persons have a name that matches on country and all name components.
Name - Basic	Both persons have a name that matches on required name components. Example: First Name and Last Name in the United States.
National ID - All	Both persons have a national ID that matches on: • National ID Type, which includes the issuing country • Issue Date • Expiration Date • National ID Value
National ID - Basic	Both persons have a national ID that matches on ID type and ID value.
Phone	Both persons have a phone number that matches on country, phone number, and extension.
Previous Worker ID	Candidate previous worker ID matches: • Candidate previous worker ID • Contingent worker ID • Employee ID Employee ID matches: • Candidate previous worker • Former worker ID Contingent worker ID matches: • Candidate previous worker ID • Former worker ID Former worker ID matches: • Candidate previous worker ID • Contingent worker ID • Employee ID
Previous Worker Location	Matches are based on: • A candidate's previous worker location includes the other person's previous worker location. • The other person's previous work location includes the candidate's previous worker location. • A candidate's previous worker location includes the former worker's location.

Criteria	Description
	• The former worker's location includes the candidate's previous worker location. • A candidate's previous worker location partially matches another person's worker location, ancestor's location, or descendant's location.
Previous Worker Manager	Matches are based on: • A candidate's previous worker manager includes the other person's previous worker manager. • The other person's previous worker manager includes the candidate's previous worker manager. • A candidate's previous worker manager includes the former worker manager of the former worker. • The former worker manager of the former worker includes the candidate's previous worker manager. • A candidate's previous worker manager equals the name of the manager of another worker's primary job.

Reference: Supported Person Type Combinations for Merge

You can merge source and target records for combinations of person types. In the hierarchy of supported person-type combinations for merge, the person with the higher-ranked person type is the target.

Source	Target
Candidate	Active Employee and Future-dated Employee
Candidate	Candidate (Workday selects the Candidate who has been in the tenant for the longest time as the target.)
Candidate	Contingent Worker (Active Contingent Worker, Future-dated Contingent Worker, and Inactive Contingent Worker)
Candidate	External Student
Candidate	Former Worker
Candidate	Matriculated Student
Candidate	Pre-hire
Candidate	Student Prospect
Candidate	Terminated Employee
External Student	Active Employee and Future-dated Employee
External Student	Contingent Worker (Active Contingent Worker and Future-dated Contingent Worker)

Source	Target
Matriculated Student	Active Employee and Future-dated Employee)
Matriculated Student	Contingent Worker (Active Contingent Worker, Future-dated Contingent Worker, and Inactive Contingent Worker)
Pre-hire	Contingent Worker (Active Contingent Worker, Future-dated Contingent Worker, and Inactive Contingent Worker)
Pre-hire	Employee (Terminated Employee only)
Pre-hire	External student
Pre-hire	Former worker
Pre-hire	Matriculated Student
Pre-hire	Pre-hire (Workday selects the pre-hire who you entered first in your tenant as the target.)
Pre-hire	Student Prospect
Student Prospect	Active Employee and Future-dated Employee
Student Prospect	Contingent Worker (Active Contingent Worker, Future-dated Contingent Worker, and Inactive Contingent Worker)
Student Prospect	External Student
Student Prospect	Matriculated Student
Student Prospect	Student Prospect
Student Prospect	Terminated Employee

Merging Person Types with System Accounts

Specific merge rules apply to these person type combinations with Workday system accounts:

Source	Target
External Student	Contingent Worker
External Student	Employee
External Student	Terminated Worker

When merging these person type combinations with Workday system accounts, consider:

Source	Target	Merge Description
Active system account	Active system account	Workday prevents the merge because the source is active.
Active system account	Inactive system account	Workday prevents the merge because the source is active.
Inactive system account	Inactive system account	Workday merges the accounts and retains the target system account.

Source	Target	Merge Description
Inactive system account	Active system account	Workday merges the accounts and retains the target system account.
No system account	Active system account	Workday merges the accounts and retains the target system account.
No system account	Inactive system account	Workday merges the accounts and retains the target system account.
Active system account	No system account	Workday prevents the merge because the source is active.
Inactive system account that was never accessed	No system account	Workday merges the records and moves the source account to the target.
Inactive system account that was accessed in the past	No system account	Workday merges the records, but doesn't move the source account to the target.

Reference: Merge Operations

This table illustrates how Workday merges data from a source record to a target record using these operations.

Operation	Behavior
And	Set the target attribute to True only when the source and the target attribute are both True. Otherwise, set to False.
Append	Add the data from the source to the target. Example: When the source has A and the target has B, the merged record has A and B.
Copy and Append	Copy all values from the source and add them to the target.
Copy Unique and Append	Copy and append only unique values from the source to the target. Example: If the source has A and the target has A, the merged record has only A. If the source has A and the target has B, the merged record has A and B.
Custom Processing	Merges based on the behavior of the data.
Earliest Date	Use the earliest calendar date.
Last Updated (from Audit)	Locate the most recent update and keep those values on the target. Example: When the source has A (updated last year) and the target has B (updated last month), the merged record has B.
Latest Date	Take the latest calendar date.
Move Unique and Append	Use instances that are unique on the source and form a union of them with the instances from the

Operation	Behavior
	target. Example: When the source has A and the target has A, the merged record has A. When the source has A and the target has B, the merged record has A and B.
Or	Set the target attribute to True when either the source or target attribute is set to True. Otherwise, set it to False. Example: When the source has a check box selected and the target has the same check box cleared, then the merged record has the check box selected.
Overwrite Unless Target is Empty	If the source isn’t empty, add the source value to the target. Otherwise, keep the target value. Example: If the source has A, merge that value to the target. If the source is empty, keep the target value.
Use Source if Target is Empty	When the target has a value, keep it. When the target is empty, set it to the value from the source. Example: When the source has A and the target is empty, the merged record has A. When the target isn’t empty, keep the value on the target.

Reference: Merge Rules for Personal Data Fields

This table illustrates how Workday merges specific fields in the absence or presence of source and target values using particular operations. The table includes these terms:

- Custom Processing: The Behavior column provides a description of how we process the data.
- Functionally Equivalent: Workday considers the data values on the source and target records to match.

Note: These merge rules apply to all person types except employee. For an active employee, you can use the Manage Match Rules task to configure these Employee Merge options:

- Append the data from the source to add any different data on the source to the target employee record.
- Don't append data from the source to leave any different data on the source record.

We merge personal information and contact information, with the exception of that data on recruiting job applications.

Field	Source Value?	Target Value?	Operation	Behavior
Sexual Orientation and Gender Identity	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values for: • Expiration Date • ID Issuing Authority • Identifier ID

Field	Source Value?	Target Value?	Operation	Behavior
				• Issued Date • Passport ID Type • Visa ID Type
Sexual Orientation and Gender Identity	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, keep the most recent update on the target, based on the effective date, if the source and target have unique values for: • Expiration Date • ID Issuing Authority • Identifier ID • Issued Date • Passport ID Type • Visa ID Type When the effective dates are the same on both the source and target, we use the completed date.
Sexual Orientation and Gender Identity	Yes	No	Last Updated (from Audit)	When not functional equivalent and the source has a value and the target doesn't, keep the source value on the target.
Sexual Orientation and Gender Identity	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Citizenship Status	Yes	Yes	Append	When functionally equivalent, keep

Field	Source Value?	Target Value?	Operation	Behavior
				the value on the target if the source and target have matching values for: • Expiration Date • ID Issuing Authority • Identifier ID • Issued Date • Passport ID Type • Visa ID Type
Citizenship Status	Yes	Yes	Append	When not functionally equivalent, keep the most recent update on the target, based on the effective date, if the source and target have unique values for: • Expiration Date • ID Issuing Authority • Identifier ID • Issued Date • Passport ID Type • Visa ID Type When the effective dates are the same on both the source and target, we use the completed date.
Citizenship Status	Yes	No	Append	When not functional equivalent and the source has a value and the target doesn't, keep the source value on the target.

Field	Source Value?	Target Value?	Operation	Behavior
Citizenship Status	No	Yes	Append	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Date of Birth	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values for: • Expiration Date • ID Issuing Authority • Identifier ID • Issued Date
Date of Birth	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, keep the most recent update on the target, based on the effective date, if the source and target have unique values for: • Expiration Date • ID Issuing Authority • Identifier ID • Issued Date • License Class • License Identifier • Verification Date • Verification by Worker When the effective dates are the same for both the source and

Field	Source Value?	Target Value?	Operation	Behavior
				target, we use the completed date.
Date of Birth	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Date of Birth	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Date of Death	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values for: • Custom Description • Custom ID Type • Expiration Date • ID Issuing Authority • Identifier ID • Issued Date • Organization
Date of Death	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, keep the most recent update on the target, based on the effective date, if the source and target have unique values for: • Custom Description

Field	Source Value?	Target Value?	Operation	Behavior
				• Custom ID Type • Expiration Date • ID Issuing Authority • Identifier ID • Issued Date • Organization When the effective dates are the same on both the source and target, we use the completed date.
Date of Death	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Date of Death	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Gender	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values for: • DHS Document • Expiration Date • Government ID Type • ID Issuing Authority • Identifier ID • Issuing Agency

Field	Source Value?	Target Value?	Operation	Behavior
				• Issued Date • National ID Type • Series
Gender	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, find the most recent update based on the effective date and keep it on the target. When the effective dates are the same on both the source and target, we use the completed date.
Gender	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Gender	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Gender Identity (New)	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values for: • DHS Document • Expiration Date • Government ID Type • ID Issuing Authority • Identifier ID

Field	Source Value?	Target Value?	Operation	Behavior
				• Issuing Agency • Issued Date • National ID Type • Series
Gender Identity (New)	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, keep the most recent update on the target, based on the effective date, if the source and target have unique values for: • DHS Document • Expiration Date • Government ID Type • ID Issuing Authority • Identifier ID • Issuing Agency • Issued Date • National ID Type • Series When the effective dates are the same on both the source and target, we use the completed date.
Gender Identity (New)	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Gender Identity (New)	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't

Field	Source Value?	Target Value?	Operation	Behavior
				have a value and the target does, keep the target value.
Sexual Orientation (New)	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values.
Sexual Orientation (New)	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, find the most recent update based on the effective date and keep it on the target. When the effective dates are the same for both the source and target, we use the completed date.
Sexual Orientation (New)	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Sexual Orientation (New)	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Pronoun (New)	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values.
Pronoun (New)	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, find

Field	Source Value?	Target Value?	Operation	Behavior
				the most recent update based on the effective date and keep it on the target. When the effective dates are the same on both the source and target, we use the completed date.
Pronoun (New)	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Pronoun (New)	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.

Reference: Merge Rules for Grouped Personal Data Fields

This table illustrates how Workday merges specific fields in the absence or presence of source and target values using particular operations.

Note: These merge rules apply to all person types except employee. When you merge an employee record, you have the option to append data that doesn't match from the source to the target. You also have the option to leave that data on the source.

Grouped Field	Source Value?	Target Value	Operation	Behavior
Hukou, Grouped: • Hukou Locality • Hukou Postal Code • Hukou Country Subregion • Hukou Type • Hukou Native	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values.

Grouped Field	Source Value?	Target Value	Operation	Behavior
Country Region • Personnel File Agency				
Hukou, Grouped: • Hukou Locality • Hukou Postal Code • Hukou Country Subregion • Hukou Type • Hukou Native Country Region • Personnel File Agency	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, find the most recent update and keep it on the target.
Hukou, Grouped: • Hukou Locality • Hukou Postal Code • Hukou Country Subregion • Hukou Type • Hukou Native Country Region • Personnel File Agency	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Hukou, Grouped: • Hukou Locality • Hukou Postal Code • Hukou Country Subregion • Hukou Type	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.

Grouped Field	Source Value?	Target Value	Operation	Behavior
• Hukou Native Country Region • Personnel File Agency				
Medical Exam, Grouped: • Medical Exam Date • Medical Exam Expiration Date • Medical Exam Notes	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values.
Medical Exam, Grouped: • Medical Exam Date • Medical Exam Expiration Date • Medical Exam Notes	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, find the most recent update and keep it on the target.
Medical Exam, Grouped: • Medical Exam Date • Medical Exam Expiration Date • Medical Exam Notes	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Medical Exam, Grouped: • Medical Exam Date • Medical Exam Expiration Date	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.

Grouped Field	Source Value?	Target Value	Operation	Behavior
• Medical Exam Notes				
Place of Birth, Grouped: • Place of Birth Country Region • Place of Birth Country Subregion • Place of Birth Country • Place of Birth - Text • Place of Birth - Prompt	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values.
Place of Birth, Grouped: • Place of Birth Country Region • Place of Birth Country Subregion • Place of Birth Country • Place of Birth - Text • Place of Birth - Prompt	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, find the most recent update and keep it on the target.
Place of Birth, Grouped: • Place of Birth Country Region • Place of Birth Country Subregion	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.

Grouped Field	Source Value?	Target Value	Operation	Behavior
• Place of Birth Country • Place of Birth - Text • Place of Birth - Prompt				
Place of Birth, Grouped: • Place of Birth Country Region • Place of Birth Country Subregion • Place of Birth Country • Place of Birth - Text • Place of Birth - Prompt	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Marital Status, Grouped: • Marital Status • Marital Status Date	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values.
Marital Status, Grouped: • Marital Status • Marital Status Date	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, find the most recent update and keep it on the target.
Marital Status, Grouped: • Marital Status • Marital Status Date	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Marital Status, Grouped:	No	Yes	Last Updated (from Audit)	When not functionally

Grouped Field	Source Value?	Target Value	Operation	Behavior
• Marital Status • Marital Status Date				equivalent and the source doesn't have a value and the target does, keep the target value.
Nationality, Grouped: • Nationality - Primary • Nationality - Additional	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values. There must be a primary value if additional has a value.
Nationality, Grouped: • Nationality - Primary • Nationality - Additional	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, find the most recent update for the source and target. Designate one as the primary and append any additional as additional.
Nationality, Grouped: • Nationality - Primary • Nationality - Additional	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target as primary. If additional values exist, append as additional.
Nationality, Grouped: • Nationality - Primary • Nationality - Additional	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value as primary. If additional values exist, append as additional.

Grouped Field	Source Value?	Target Value	Operation	Behavior
Nationality, Grouped: • Nationality - Primary • Nationality - Additional	All	All	Last Updated (from Audit)	When functionally equivalent, if the source has a primary value that matches any additional nationality on the target, keep only the primary value on the target and don't append a duplicate value.
Blood Type	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values.
Blood Type	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, find the most recent update and keep it on the target.
Blood Type	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Blood Type	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Ethnicity	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values.
Ethnicity	Yes	Yes	Last Updated (from Audit)	When not functionally

Grouped Field	Source Value?	Target Value	Operation	Behavior
				equivalent, find the most recent update and copy unique values and append to the target.
Ethnicity	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Ethnicity	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Ethnicity - Visual Survey	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values.
Ethnicity - Visual Survey	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, find the most recent update and copy unique values and append to the target.
Ethnicity - Visual Survey	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Ethnicity - Visual Survey	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't

Grouped Field	Source Value?	Target Value	Operation	Behavior
				have a value and the target does, keep the target value.
Social Benefits Locality	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values.
Social Benefits Locality	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, find the most recent update and keep it on the target.
Social Benefits Locality	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Social Benefits Locality	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Hispanic or Latino	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values.
Hispanic or Latino	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, find the most recent update and keep it on the target.
Hispanic or Latino	Yes	No	Last Updated (from Audit)	When not functionally equivalent and

Grouped Field	Source Value?	Target Value	Operation	Behavior
				the source has a value and the target doesn't, keep the source value on the target.
Hispanic or Latino	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Hispanic or Latino - Visual Survey	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values.
Hispanic or Latino - Visual Survey	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, find the most recent update and keep it on the target.
Hispanic or Latino - Visual Survey	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Hispanic or Latino - Visual Survey	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Uses Tobacco	Yes	Yes	Last Updated (from Audit)	When functionally equivalent, keep the value on the target if the source and target have matching values.

Grouped Field	Source Value?	Target Value	Operation	Behavior
Uses Tobacco	Yes	Yes	Last Updated (from Audit)	When not functionally equivalent, find the most recent update and keep it on the target.
Uses Tobacco	Yes	No	Last Updated (from Audit)	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Uses Tobacco	No	Yes	Last Updated (from Audit)	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Relative Name	Yes	Yes	Copy Unique and Append	When functionally equivalent, keep the value on the target if the source and target have matching values.
Relative Name	Yes	Yes	Copy Unique and Append	When not functionally equivalent, find the most recent update and keep it on the target.
Relative Name	Yes	No	Copy Unique and Append	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Relative Name	No	Yes	Copy Unique and Append	When not functionally equivalent and the source doesn't have a value and the target does,

Grouped Field	Source Value?	Target Value	Operation	Behavior
				keep the target value.
Disability Status	Yes	Yes	Copy Unique and Append	When functionally equivalent, keep the value on the target if the source and target have matching values.
Disability Status	Yes	Yes	Copy Unique and Append	When not functionally equivalent, find the most recent update and keep it on the target.
Disability Status	Yes	No	Copy Unique and Append	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Disability Status	No	Yes	Copy Unique and Append	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Military Status	Yes	Yes	Copy Unique and Append	When functionally equivalent, keep the value on the target if the source and target have matching values.
Military Status	Yes	Yes	Copy Unique and Append	When not functionally equivalent, find the most recent update and keep it on the target.
Military Status	Yes	No	Copy Unique and Append	When not functionally equivalent and the source has a value and the

Grouped Field	Source Value?	Target Value	Operation	Behavior
				target doesn't, keep the source value on the target.
Military Status	No	Yes	Copy Unique and Append	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.

Reference: Merge Rules for Name Data Fields

This table illustrates how Workday merges specific fields in the absence or presence of source and target values using particular operations. The table includes these terms:

- Custom Processing: The Behavior column provides a description of how we process the data.
- Functionally Equivalent: Workday considers the data values on the source and target records to match.

Note: These merge rules apply to all person types except employee. For an active employee, you can use the Manage Match Rules task to configure these Employee Merge options:

- Append the data from the source to add any different data on the source to the target employee record.
- Don't append data from the source to leave any different data on the source record.

We merge personal information and contact information, with the exception of that data on recruiting job applications.

Field	Source Value?	Target Value?	Operation	Behavior
Legal Name	Yes	Yes	Custom Processing	When a Legal Name is added through an event, we use that name. When a Legal Name is not added on the source or target through an event, and the source and target are functionally equivalent, keep the value on the target when the source and target have matching values.
Legal Name	Yes	Yes	Custom Processing	When a Legal Name is added through an event,

Field	Source Value?	Target Value?	Operation	Behavior
				we use that name. When a Legal Name is not added on the source or target through an event, and the source and target are not functionally equivalent, find the most recent update—the data most recently entered on either the source or target based on the effective date —and keep it on the target. If the effective dates are the same on both the source and target, then we use the completed date. Append any additional names as Additional Names to the target.
Legal Name	Yes	No	Custom Processing	When a Legal Name is added through an event, we use that name. When a Legal Name is not added on the source or target through an event, and the source and target are not functionally equivalent, and the source has a value and the target doesn't, keep the source value on the target.
Legal Name	No	Yes	Custom Processing	When a Legal Name is added through an event, we use that name. When a Legal

Field	Source Value?	Target Value?	Operation	Behavior
				Name is not added on the source or target through an event, and the source and target are not functionally equivalent, and the source doesn't have a value and the target does, keep the target value.
Preferred Name	Yes	Yes	Custom Processing	When functionally equivalent, keep the value on the target when the source and target have matching values.
Preferred Name	Yes	Yes	Custom Processing	When not functionally equivalent, find the most recent update on the source based on the completed date and move it to the target. Append any additional names as Preferred Names to the target.
Preferred Name	Yes	No	Custom Processing	When not functionally equivalent and the source has a value and the target doesn't, move the source value to the target.
Preferred Name	No	Yes	Custom Processing	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.

Field	Source Value?	Target Value?	Operation	Behavior
Additional Name	Yes	Yes	Custom Processing	When functionally equivalent, keep the value on the target when the source and target have matching values.
Additional Name	Yes	Yes	Custom Processing	When not functionally equivalent, add additional name from the source to the target.
Additional Name	Yes	No	Custom Processing	When not functionally equivalent and the source has a value and the target doesn't, append the source values on the target.
Additional Name	No	Yes	Custom Processing	When not functionally equivalent and the source doesn't have a value and the target does, append the target values.

Reference: Merge Rules for ID Data Fields

This table illustrates how Workday merges specific fields in the absence or presence of source and target values using particular operations.

Field	Source Value	Target Value	Operation	Behavior
Passport ID	Yes	Yes	Custom Processing	For all person types, when the source and target have matching values, keep the value on the target.
Passport ID	Yes	Yes	Custom Processing	When the target is an employee or contingent worker and the source and target don't have matching values,

Field	Source Value	Target Value	Operation	Behavior
				don't merge the records. For other person types, when the source and target values aren't functionally equivalent, find the most recent update and keep it on the target. Copy and append any unique Passport data from the source to the target.
Passport ID	Yes	No	Custom Processing	When the target is an employee or contingent worker and the source and target don't have matching values, don't merge the records. For other person types, when not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Passport ID	No	Yes	Custom Processing	When the target is an employee or contingent worker and the source and target don't have matching values, don't merge the records. For other person types, when not functionally equivalent and the source doesn't have a value and the target does, keep the target value.

Field	Source Value	Target Value	Operation	Behavior
Visa ID	Yes	Yes	Custom Processing	For all person types, when the source and target have matching values, keep the value on the target.
Visa ID	Yes	Yes	Custom Processing	When the target is an employee or contingent worker and the source and target don't have matching values, don't merge the records. For other person types, when not functionally equivalent, find the most recent update and keep it on the target. Copy and append any unique Visa data from the source to the target.
Visa ID	Yes	No	Custom Processing	When the target is an employee or contingent worker and the source and target don't have matching values, don't merge the records. For other person types, when not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Visa ID	No	Yes	Custom Processing	When the target is an employee or contingent worker and the source and

Field	Source Value	Target Value	Operation	Behavior
				target don't have matching values, don't merge the records. For other person types, when not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
License ID	Yes	Yes	Custom Processing	For all person types, when the source and target have matching values, keep the value on the target.
License ID	Yes	Yes	Custom Processing	When the target is an employee or contingent worker and the source and target don't have matching values, don't merge the records. For other person types, when not functionally equivalent, find the most recent update and keep it on the target. Copy and append any unique License data from the source to the target.
License ID	Yes	No	Custom Processing	When the target is an employee or contingent worker and the source and target don't have matching values, don't merge the records. For other person types, when not functionally

Field	Source Value	Target Value	Operation	Behavior
				equivalent and the source has a value and the target doesn't, keep the source value on the target.
License ID	No	Yes	Custom Processing	When the target is an employee or contingent worker and the source and target don't have matching values, don't merge the records. For other person types, when not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Custom ID / Other ID	Yes	Yes	Custom Processing	For all person types, when the source and target have matching values, keep the value on the target.
Custom ID / Other ID	Yes	Yes	Custom Processing	When the target is an employee or contingent worker and the source and target don't have matching values, don't merge the records. For other person types, when not functionally equivalent, find the most recent update and keep it on the target. Copy and append any unique Custom ID / Other ID data from the

Field	Source Value	Target Value	Operation	Behavior
				source to the target.
Custom ID / Other ID	Yes	No	Custom Processing	When the target is an employee or contingent worker and the source and target don't have matching values, don't merge the records. For other person types, when not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Custom ID / Other ID	No	Yes	Custom Processing	When the target is an employee or contingent worker and the source and target don't have matching values, don't merge the records. For other person types, when not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
National ID	Yes	Yes	Custom Processing	For all person types, when the source and target have matching values for national ID type and national ID value, keep the value on the target.
National ID	Yes	Yes	Custom Processing	For all person types, when the source and target don't

Field	Source Value	Target Value	Operation	Behavior
				have matching values for national ID type and national ID value, don't merge the records.
National ID	Yes	No	Custom Processing	For all person types, when the source and target don't have matching values for national ID type and national ID value, don't merge the records.
National ID	No	Yes	Custom Processing	For all person types, when the source and target don't have matching values for national ID type and national ID value, don't merge the records.
Government ID	Yes	Yes	Custom Processing	For all person types, when the source and target have matching values, keep the value on the target.
Government ID	Yes	Yes	Custom Processing	When the target is an employee or contingent worker and the source and target don't have matching values, don't merge the records. For other person types, when not functionally equivalent, find the most recent update and keep it on the target. Copy and append any unique Government ID

Field	Source Value	Target Value	Operation	Behavior
				data from the source to the target.
Government ID	Yes	No	Custom Processing	When the target is an employee or contingent worker and the source and target don't have matching values, don't merge the records. For other person types, when not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target.
Government ID	No	Yes	Custom Processing	When the target is an employee or contingent worker and the source and target don't have matching values, don't merge the records. For other person types, when not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Universal ID	Yes	Yes	Use source if target is empty.	Keep the target value.
Universal ID	Yes	No	Use source if target is empty.	When the target has a value, keep it. When the target doesn't have a value, set it to the value on the source.
Universal ID	No	Yes	Use source if target is empty.	When the target has a value, keep it. When the target

Field	Source Value	Target Value	Operation	Behavior
				doesn't have a value, set it to the value on the source.
Universal ID	No	No	Not applicable.	Not applicable.

Reference: Merge Rules for Contact Information Data Fields

This table illustrates how Workday merges specific fields in the absence or presence of source and target values using particular operations.

Note: These merge rules apply to all person types except employee. When you merge an employee record, you have the option to append data that doesn't match from the source to the target. You also have the option to leave that data on the source.

Field	Source Value?	Target Value?	Operation	Behavior
Primary Home Email Address	Yes	Yes	Custom Processing	When functionally equivalent, keep the value on the target if the source and target have matching values. Append any additional Communication Usage Behavior types to the target.
Primary Home Email Address	Yes	Yes	Custom Processing	When not functionally equivalent, find the most recent update and keep it on the target. Keep the last updated email address as the Primary Home Email Address on the target. Append the source email address as an additional Home Email Address. Append any additional Communication Usage Behavior types to the target.
Primary Home Email Address	Yes	No	Custom Processing	When not functionally

Field	Source Value?	Target Value?	Operation	Behavior
				equivalent and the source has a value and the target doesn't, keep the source value on the target. Append any additional Communication Usage Behavior types to the target.
Primary Home Email Address	No	Yes	Custom Processing	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Primary Work Email Address	Yes	Yes	Custom Processing	When functionally equivalent, keep the value on the target if the source and target have matching values. Append any additional Communication Usage Behavior types to the target.
Primary Work Email Address	Yes	Yes	Custom Processing	When not functionally equivalent, find the most recent update and keep it on the target. Keep the target value and append the source email address as an additional Work Email Address. Append any additional Communication Usage Behavior types to the target.
Primary Work Email Address	Yes	No	Custom Processing	When not functionally

Field	Source Value?	Target Value?	Operation	Behavior
				equivalent and the source has a value and the target doesn't, keep the source value on the target as the Primary Work Email Address. Append any additional Communication Usage Behavior types to the target.
Primary Work Email Address	No	Yes	Custom Processing	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value as the Primary Work Email Address. Append any additional Communication Usage Behavior types to the target.
Additional Email Address	Yes	Yes	Custom Processing	When functionally equivalent, keep the target as Additional Email Address. Append any additional Communication Usage Behavior types to the target.
Additional Email Address	Yes	Yes	Custom Processing	When not functionally equivalent, find the most recent update and keep it on the target. Copy unique and append any additional email addresses on the target. Append any additional

Field	Source Value?	Target Value?	Operation	Behavior
				Communication Usage Behavior types to the target.
Additional Email Address	Yes	No	Custom Processing	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target. Append any additional Communication Usage Behavior types to the target.
Additional Email Address	No	Yes	Custom Processing	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value. Append any additional Communication Usage Behavior types to the target.
Primary Home Phone	Yes	Yes	Custom Processing	When functionally equivalent, keep the value on the target if the source and target have matching values. Append any additional Communication Usage Behavior types to the target.
Primary Home Phone	Yes	Yes	Custom Processing	When not functionally equivalent, find the most recent update and keep it on the target. Keep the last updated phone number as the

Field	Source Value?	Target Value?	Operation	Behavior
				Primary Home Phone Number on the target. Append the source phone number as an additional Home Phone Number. Append any additional Communication Usage Behavior types to the target.
Primary Home Phone	Yes	No	Custom Processing	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target. Append any additional Communication Usage Behavior types to the target.
Primary Home Phone	No	Yes	Custom Processing	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value. Append any additional Communication Usage Behavior types to the target.
Additional Phone Number	Yes	Yes	Custom Processing	When functionally equivalent, keep the value on the target if the source and target have matching values. Keep the target value as Additional Phone Number. Append any additional Communication

Field	Source Value?	Target Value?	Operation	Behavior
				Usage Behavior types to the target.
Additional Phone Number	Yes	Yes	Custom Processing	When not functionally equivalent, find the most recent update and keep it on the target. Copy unique and append any additional phone numbers to the target. Append any additional Communication Usage Behavior types to the target.
Additional Phone Number	Yes	No	Custom Processing	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target. Append any additional Communication Usage Behavior types to the target.
Additional Phone Number	No	Yes	Custom Processing	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value. Append any additional Communication Usage Behavior types to the target.
Primary Work Phone Number	Yes	Yes	Custom Processing	When functionally equivalent, keep the value on the target if the source and target have matching

Field	Source Value?	Target Value?	Operation	Behavior
				values. Append any additional Communication Usage Behavior types to the target.
Primary Work Phone Number	Yes	Yes	Custom Processing	When not functionally equivalent, find the most recent update and keep it on the target. Keep the last updated phone number as the Primary Work Phone Number on the target, and append the source phone number as an additional Work Phone Number. Append any additional Communication Usage Behavior types to the target.
Primary Work Phone Number	Yes	No	Custom Processing	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target. Append any additional Communication Usage Behavior types to the target.
Primary Work Phone Number	No	Yes	Custom Processing	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value. Append any additional Communication

Field	Source Value?	Target Value?	Operation	Behavior
				Usage Behavior types to the target.
Web Address	Yes	Yes	Custom Processing	When functionally equivalent, keep the value on the target if the source and target have matching values. Append any additional Communication Usage Behavior types to the target.
Web Address	Yes	Yes	Custom Processing	When not functionally equivalent, find the most recent update and keep it on the target. Keep the last updated web address as the Web Address on the target, and append the source web address as an additional Web Address. Append any additional Communication Usage Behavior types to the target.
Web Address	Yes	No	Custom Processing	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target. Append any additional Communication Usage Behavior types to the target.
Web Address	No	Yes	Custom Processing	When not functionally

Field	Source Value?	Target Value?	Operation	Behavior
				equivalent and the source doesn't have a value and the target does, keep the target value. Append any additional Communication Usage Behavior types to the target.
Instant Messenger	Yes	Yes	Custom Processing	When functionally equivalent, keep the value on the target if the source and target have matching values. Append any additional Communication Usage Behavior types to the target.
Instant Messenger	Yes	Yes	Custom Processing	When not functionally equivalent, find the most recent update and keep it on the target. Keep the last updated instant messenger as the Instant Messenger on the target, and append the source Instant Messenger value as additional Instant Messengers. Append any additional Communication Usage Behavior types to the target.
Instant Messenger	Yes	No	Custom Processing	When not functionally equivalent and the source has a value and the target doesn't,

Field	Source Value?	Target Value?	Operation	Behavior
				keep the source value on the target. Append any additional Communication Usage Behavior types to the target.
Instant Messenger	No	Yes	Custom Processing	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value. Append any additional Communication Usage Behavior types to the target.
Social Networks	Yes	Yes	Custom Processing	When functionally equivalent, keep the value on the target if the source and target have matching values.
Social Networks	Yes	Yes	Custom Processing	When not functionally equivalent, find the most recent update and keep it on the target. Keep the last updated social network value as the Social Network on the target, and append the source network values as additional Social Networks.
Social Networks	Yes	No	Custom Processing	When not functionally equivalent and the source has a value and the target doesn't, keep the source

Field	Source Value?	Target Value?	Operation	Behavior
				value on the target.
Social Networks	No	Yes	Custom Processing	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value.
Primary Home Address	Yes	Yes	Custom Processing	When functionally equivalent, keep the value on the target if the source and target have matching values. Append any additional Communication Usage Behavior types to the target.
Primary Home Address	Yes	Yes	Custom Processing	When not functionally equivalent, find the most recent update and keep it on the target. Append any additional Communication Usage Behavior types to the target.
Primary Home Address	Yes	No	Custom Processing	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target. Append any unique addresses as an Additional Address. Append any additional Communication Usage Behavior types to the target.

Field	Source Value?	Target Value?	Operation	Behavior
Primary Home Address	No	Yes	Custom Processing	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value. Append any unique addresses as an Additional Address. Append any additional Communication Usage Behavior types to the target.
Primary Work Address	Yes	Yes	Custom Processing	When functionally equivalent, keep the value on the target if the source and target have matching values. Append any additional Communication Usage Behavior types to the target.
Primary Work Address	Yes	Yes	Custom Processing	When not functionally equivalent, find the most recent update and keep it on the target. Append any additional Communication Usage Behavior types to the target.
Primary Work Address	Yes	No	Custom Processing	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target. Append any unique addresses as

Field	Source Value?	Target Value?	Operation	Behavior
				an Additional Address. Append any additional Communication Usage Behavior types to the target.
Primary Work Address	No	Yes	Custom Processing	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value. Append any unique addresses as an Additional Address. Append any additional Communication Usage Behavior types to the target.
Additional Home Address	Yes	Yes	Custom Processing	When functionally equivalent, keep the value on the target if the source and target have matching values. Keep the value as Additional Home Address. Append any additional Communication Usage Behavior types to the target.
Additional Home Address	Yes	Yes	Custom Processing	When not functionally equivalent, find the most recent update and keep it on the target. Copy unique and append any additional Additional Home Address to the target. Append any additional Communication

Field	Source Value?	Target Value?	Operation	Behavior
				Usage Behavior types to the target.
Additional Home Address	Yes	No	Custom Processing	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target. Append any additional Communication Usage Behavior types to the target.
Additional Home Address	No	Yes	Custom Processing	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value. Append any additional Communication Usage Behavior types to the target.
Additional Work Address	Yes	Yes	Custom Processing	When functionally equivalent, keep the value on the target if the source and target have matching values. Keep the value as Additional Work Address. Append any additional Communication Usage Behavior types to the target.
Additional Work Address	Yes	Yes	Custom Processing	When not functionally equivalent, find the most recent update and keep it on the target. Copy unique

Field	Source Value?	Target Value?	Operation	Behavior
				and append any additional Additional Work Address to the target. Append any additional Communication Usage Behavior types to the target.
Additional Work Address	Yes	No	Custom Processing	When not functionally equivalent and the source has a value and the target doesn't, keep the source value on the target. Append any additional Communication Usage Behavior types to the target.
Additional Work Address	No	Yes	Custom Processing	When not functionally equivalent and the source doesn't have a value and the target does, keep the target value. Append any additional Communication Usage Behavior types to the target.

Reference: Unmerge Operations

This table illustrates how Workday unmerges data from a previously merged record using these operations.

Operation	Behavior
Add Back Pre-Merge Values, Remove Source Instances from Target	Add back any values that were removed from the target in/on/during the merge. Keep any values added to the target after the merge. Values brought from the source as part of the merge remain.
Add Pre-Merge Values and Leave Other Changes	Remove merged source values from the target and add them back to the source. Add any removed values from before the merge back to

Operation	Behavior
	the targe. Keep any values added to the target after the merge.
Add Pre-Merge Values and Remove Source Values	Workday returns the source and the target to their original states.
Add Source Back	Workday returns the source and the target to their original states. If you made changes after the merge, keep the updated values on the target.
Custom Processing	Unmerge based on the behavior of the data.
Keep As Is	Don't change the source or target at the time of the unmerge.
Leave As Is	Workday returns the source and the target to their original states. If you made changes after the merge, Workday keeps the updated values on the target.
Remove Source Values	Return the source and the target to their original states. If you made changes after the merge, keep the updated values on the target.
Revert to Pre-Merge Value	Set the target value back to what it was before the merge.

Reference: Unmerge Rules for Personal Data Fields

This table illustrates how Workday unmerges specific fields in the absence or presence of source and target values using particular operations.

Field	Operation	Behavior
Sexual Orientation & Gender Identity	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Sexual Orientation & Gender Identity	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday enables the unmerge. After unmerging the records, Workday keeps additions, puts deletions back, and keeps updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Citizenship Status	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Citizenship Status	Custom Processing	When a change (add, delete, or update) didn't create an event,

Field	Operation	Behavior
		Workday enables the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Date of Birth	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Date of Birth	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday enables the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Date of Death	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Date of Death	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday enables the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Gender	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Gender	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday enables the unmerge. After unmerging the records, Workday keeps any additions

Field	Operation	Behavior
		on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Gender Identity	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Gender Identity	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday enables the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Sexual Orientation	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Sexual Orientation	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday enables the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Pronoun	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Pronoun	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday enables the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target.

Field	Operation	Behavior
		Workday doesn't revert the updates. Workday also returns the source to its original values.

Reference: Unmerge Rules for Grouped Personal Data Fields

This table illustrates how Workday unmerges specific fields in the absence or presence of source and target values using particular operations.

Field	Operation	Behavior
Hukou Hukou Locality Hukou Postal Code Hukou Country Subregion Hukou Type Hukou Native Country Region Personnel File Agency	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Hukou Hukou Locality Hukou Postal Code Hukou Country Subregion Hukou Type Hukou Native Country Region Personnel File Agency	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Medical Exam Date Medical Exam Expiration Date Medical Exam Notes	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Medical Exam Date Medical Exam Expiration Date Medical Exam Notes	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Place of Birth Country Region Country Subregion	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind

Field	Operation	Behavior
Country City of Birth - Text City of Birth - Prompt		the event before attempting to unmerge the records.
Place of Birth Country Region Country Subregion Country City of Birth - Text City of Birth - Prompt	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Marital Status Marital Status Date	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Marital Status Marital Status Date	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Nationality Primary Additional	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Nationality Primary Additional	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Blood Type	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind

Field	Operation	Behavior
		the event before attempting to unmerge the records.
Blood Type	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Ethnicity	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Ethnicity	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Ethnicity - Visual Survey	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Ethnicity - Visual Survey	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Social Benefits Locality	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.

Field	Operation	Behavior
Social Benefits Locality	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Hispanic or Latino	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Hispanic or Latino	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Hispanic or Latino - Visual Survey	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Hispanic or Latino - Visual Survey	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Use Tobacco	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Use Tobacco	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge.

Field	Operation	Behavior
		After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Relative Name	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Relative Name	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Disability Status	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Disability Status	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Military Status	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Military Status	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions

Field	Operation	Behavior
		back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.

Reference: Unmerge Rules for Name Data Fields

This table illustrates how Workday unmerges specific fields in the absence or presence of source and target values using particular operations.

Field	Operation	Behavior
Legal Name	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Legal Name	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Preferred Name	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Preferred Name	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Additional Name	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Additional Name	Custom Processing	When a change (add, delete, or update) didn't create an event,

Field	Operation	Behavior
		Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.

Reference: Unmerge Rules for ID Data Fields

This table illustrates how Workday unmerges specific fields in the absence or presence of source and target values using particular operations.

Field	Operation	Behavior
Passport	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Passport	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Visa	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Visa	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
License	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind

Field	Operation	Behavior
		the event before attempting to unmerge the records.
License	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Custom ID/Other ID	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Custom ID/Other ID	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
National ID	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
National ID	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Government ID	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.

Field	Operation	Behavior
Government ID	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Universal ID	Keep As Is	Workday doesn't change the source or target values at the time of the unmerge.

Reference: Unmerge Rules for Contact Information Data Fields

This table illustrates how Workday unmerges specific fields in the absence or presence of source and target values using particular operations.

Field	Operation	Behavior
Primary Home Email Address	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Primary Home Email Address	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Primary Work Email Address	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Primary Work Email Address	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the

Field	Operation	Behavior
		updates. Workday also returns the source to its original values.
Additional Email Address	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Additional Email Address	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Primary Home Phone	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Primary Home Phone	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Web Address	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Web Address	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.

Field	Operation	Behavior
Instant Messenger	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Instant Messenger	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Social Networks	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Social Networks	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Primary Home Address	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Primary Home Address	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Primary Work Address	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind

Field	Operation	Behavior
		the event before attempting to unmerge the records.
Primary Work Address	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.
Additional Home Address	Custom Processing	When an event change occurs (add, delete, update) on the person after the merge, rescind the event before attempting to unmerge the records.
Additional Home Address	Custom Processing	When a change (add, delete, or update) didn't create an event, Workday allows the unmerge. After unmerging the records, Workday keeps any additions on the target, puts any deletions back on the target, and keeps any updates on the target. Workday doesn't revert the updates. Workday also returns the source to its original values.

Auditing

Setup Considerations: Audit Trails

You can use this topic to help make decisions when planning your configuration and use of audit trails. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Audit trails is a method of tagging, monitoring, and reporting on changes to instances of business processes, certain report types, user-based security groups, domain security policies, and integration systems in your tenant. Audit trails track:

- What changed.

- Who changed it.
- When it was changed.

Business Benefits

Audit trails is the quickest and most efficient way to identify configuration changes in your tenant. It allows you to:

- Identify changes and verify whether they're appropriate.
- Fix inappropriate changes quickly.
- Meet change management compliance standards.

Use Cases

You can use audit tags to:

- Track a change on a calculation field that you use in a condition rule that is in turn used in a step in a business process.
- Track a change to a filter in a row on a custom report.
- Track a change to a security group or a change to permissions on a domain security policy.

Questions to Consider

Question	Consideration
What instances of business processes, report types, user-based security groups, domain security policies, and integration systems do you want to audit?	Determine which instances of business processes, report types, security groups, domain security policies, and integration systems are in scope for your audit. Tag those instances and view changes in the Audit Trail Report.
Do you want to limit users' access to audit some or all instances?	Restrict access to audit tags by assigning them to audit tag segments. Only users who belong to a segment-based security group in the *Set Up: Audit Tags and Assignments - Add Only* domain or the *Set Up: Audit Tags and Assignments* domain can access these audit tags.
Which instances that you want to audit are supported in the new Audit Trail Report?	Determine which instances you want to audit. You can audit instances of business processes, report types, security groups, domain security policies, and integration systems using the Audit Trail Report and the Audit Trail Configuration Report. You can audit other instances not reported on in the Audit Trail Report and the Audit Trail Configuration Report using one of the reports in "Reporting" below.

Recommendations

We recommend that you use the Audit Trail Report and the Audit Trail Configuration Report together. The Audit Trail Report reports on the relationships that are relevant to each instance you tag for auditing. The Audit Trail Configuration Report reports on the relationships *Workday uses* to find changes on instances related to your primary (tagged) instances.

Requirements

No impact.

Limitations

We enable you to audit only instances of:

- Business processes.
- Certain report types.
- Domain security policies.
- Integration systems.
- User-based security groups.

Tenant Setup

No impact.

Security

Domains	Considerations
Audit Tag (Segmented) in the System functional area	Enables you to create and edit audit tag segments and to assign audit tags to audit tag segments.
Set Up: Audit Tags and Assignments in the System functional area	Enables you to create, edit, and delete audit tags and audit tag assignments.
Set Up: Audit Tags and Assignments – Add Only in the System functional area	Enables you to create and edit audit tags and audit tag assignments.

Business Processes

No impact.

Reporting

Report	Considerations
Audit Trail	You can tag instances of business processes, certain report types, user-based security groups, domain security policies and integrations, and run the report for the tagged instances to view the lineage of changes.
Audit Trail Configuration Report	You can view: • What relationships Workday uses to find changes on instances related to your primary (tagged) instances. • The date on which Workday includes the relationships in the Audit Trail Report. • When the instances and relationships changed in your tenant.
Audit Tag by Tag	You can view all active and inactive audit tags in your tenant, as well as tagged instances under each audit tag.
Business Process Security Policy History	You can view changes made to 1 or more business process security policies within a selected date range. This report shows the date of change and the person who made the change.

Report	Considerations
Business Process Security Policies Changed Within Time Range	You can view all changes made to business process security policies within a selected date range. This report shows the date of change and the person who made the change.
Domain Security Policy History	You can view changes made to 1 or more domain security policies within a selected date range. This report shows the date of change and the person who made the change.
Domain Security Policies Changed Within Time Range	You can view all changes made to domain security policies within a selected date range. This report shows the date of change and the user who made the change.
View Audit Tag	You can view all audit tags in your tenant.
View Audit Tag Segment	You can view all audit tag segments in your tenant.
View User or Task or Object Audit Trail (UTO)	You can view changes made to any instances within a time range and by a specific user. Workday generates this report instantly and displays it in your tenant. It has a maximum displayable limit, so, if necessary, you can run the Create Audit Log task to generate the same report as a background process that produces an Excel file.
Worker Change History	You can view a summary of worker changes in 1 or more organizations for a selected date range.

You can also write custom reports using the *Processed Transactions for Range, System Account, Task and Business Object* data source to view changes to various instances that none of the Workday delivered reports address.

Integrations

You can run these audit trails web services to upload and retrieve data through an EIB.

Web Services	Considerations
Get Audit Tag Assignments	To add primary instances to, or remove primary instances from, audit tags, use both the Get Audit Tag Assignments and the Put Audit Tag Assignments web services.
Get Audit Tags	To add a tag to an instance, use both the Get Audit Tags and the Put Audit Tag web services.
Get Audit Tag Segments	Use this web service to secure an audit tag.
Put Audit Tag	To add a tag to an instance, use both the Get Audit Tags and the Put Audit Tag web services.
Put Audit Tag Assignment	To add primary instances to, or remove primary instances from, audit tags, use both the Get

Web Services	Considerations
	Audit Tag Assignments and the Put Audit Tag Assignments web services.
Put Audit Tag Segment	Use this web service to secure an audit tag.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Steps: Set Up Auditing

Context

Create audit tags to tag, monitor, and report on changes to instances of these business objects:

- Business processes.
- Certain report types.
- User-based security groups.
- Domain security policies.
- Integration systems.

An instance is an occurrence of a business object. You can report on and track changes to instances, such as when and who made a change. Then you can address inappropriate changes quickly and meet change management compliance standards.

Using these audit tags, you can use the Audit Trail Report to track:

- Which instance changes.
- How the instance changes. Example: If someone deletes an instance, Workday displays this information on the Audit Trail Report.
- Who makes the change.
- The date of the change.
- The task on which the change is made.
- The changes to related instances and the trail to the primary instance you're auditing.

Example: You can apply an audit tag named Business Processes to track changes to these business processes:

- *Check Budget (Financial) for B300.1 Budgets Management*
- *Check Budget (Staffing) for B300.1 Budgets Management*

Steps

1. Set up these domains and use the View Domains report to review the security group types enabled for each domain:

    - *Audit Tag (Segmented)*
    - *Security Configuration*
    - *Set Up: Audit Tags and Assignments*
    - *Set Up: Audit Tags and Assignments - Add Only*
2. Edit Domain Security Policies.

    Configure which security groups have permission to access the secured items in each domain.

3. Activate Pending Security Policy Changes.

   Put domain security policies into effect. After they're in effect, Workday creates a timestamp with the current time.
4. (Optional) Configure Security for Audit Tag Segments on page 697.

   Restrict access to audit tags by assigning them to audit tag segments. Only users who belong to a segment-based security group in the *Set Up: Audit Tags and Assignments - Add Only* domain or the *Set Up: Audit Tags and Assignments* domain can access these audit tags.
5. Set Up Audit Tags on page 698.

   Create and assign audit tags to instances of Workday business objects that you want to monitor for changes.

   Security:

   - *Set Up: Audit Tags and Assignments* domain in the System functional area for users who can add, edit, and delete audit tag instances.
   - *Set Up: Audit Tags and Assignments - Add Only* domain in the System functional area for users who can only add or edit audit tag instances.
6. Set Up Audit Tag Assignments on page 699.

   Add primary instances to, or remove primary instances from, audit tags you're monitoring.

Next Steps

- Use the Audit Trail Report to monitor audit tags for changes to instances that are related to the primary instance that you're auditing.
- Use the Audit Trail Configuration Report to view the relationships that Workday uses to track changes to related instances in the Audit Trail Report.
- Use the Audit Tag by Tag Report to view all of the instances you tagged with audit tags in your tenant.

Configure Security for Audit Tag Segments

Prerequisites

Security:

- Create one or more segment-based security groups and add security groups to each.
- *Audit Tag (Segmented)* domain in the System functional area.
- *Set Up: Audit Tags and Assignments* domain in the System functional area.
- *Set Up: Audit Tags and Assignments - Add Only* domain in the System functional area.

Note: You use the *Audit Tag (Segmented)* domain to create and edit audit tag segments and to assign audit tags to audit tag segments. You use the *Set Up: Audit Tags and Assignments* domain and the *Set Up: Audit Tags and Assignments - Add Only* domain to secure the audit tags and audit tag assignments.

Context

You can secure the auditing process by assigning audit tags to audit tag segments. Audit tag segments enable you to secure access to audit tags to the security groups that you select.

Steps

1. Access Create Audit Tag Segment.
2. In Audit Tag, select the audit tags you want the new segment to secure.

   These audit tags are viewable only by users with access to the audit tag segment.

3. From the Audit Tag Segment related actions:
    - Select Audit Tag Segment > Edit to edit the audit tags in the segment.
    - Select Audits > View Audit Trail to see:
        - What audit tags you added or removed during a specified time period.
        - Who added or removed the audit tags.

Result

Workday uses the new segment to restrict access to the audit tags to only users who belong to a segment-based security group in the *Set Up: Audit Tags and Assignments - Add Only* domain or the *Set Up: Audit Tags and Assignments* domain.

Example

Your company has human resources auditors and financial auditors. To simplify and improve the auditing process, you want to restrict the human resources audit tags to human resources auditors and the financial audit tags to financial auditors. You set up 1 segment named Human Resources Auditors and another segment named Financial Auditors. These audit tag segments enable you to grant access rights to specific audit tags for the security groups that you specify.

Next Steps

- Create audit tags and assign these business objects to the instances you want to audit:
    - Business process definitions.
    - Custom report definitions.
    - User-based security groups.
    - Domain security policies.
    - Integration systems.
- Run auditing-related reports that enable you to see and respond to changes to the instances.

Set Up Audit Tags

Prerequisites

Security:

- *Audit Tag (Segmented)* domain in the System functional area.
- *Set Up: Audit Tags and Assignments* domain in the System functional area.
- *Set Up: Audit Tags and Assignments - Add Only* domain in the System functional area.

Context

You can create and assign audit tags to instances of Workday business objects that you want to monitor for changes. An instance is an occurrence of a business object.

Example: Hire (Default Definition) is an instance of a Business Process Definition business object; the Income Statement report is an instance of the Report Definition business object.

When you run reports for these audit tags and instances, Workday displays:

- The trail of changes to the instances.
- Who makes the change.
- How the change is made.
- What changes.
- When it changes.

- The trail from the instance that you're auditing to the change that occurs; the change might be on a related instance.

Steps

1. Access the Create Audit Tag task.
2. (Optional) From Audit Tag Segment, select one or more segments to restrict access to this audit tag. (If you don't select at least 1 segment, you might not be able to access the audit tag depending on your security configuration.) Or access the Create Audit Tag Segment task to create a new segment.

   You secure access to audit tags on the domain policies for the *Setup: Audit Tags and Assignments - Add Only* domain and the *Set Up: Audit Tags and Assignments* domain. Under the Report/Task Permissions section of the domain's security policy permissions, you add a segment-based security group with View or Modify access. You configure security to the audit tag segment on the segment-based security group. Then you can select which segment-based security groups you want to have access to the audit tag segment.
3. Select Inactive if you don't want to use this audit tag when running the Audit Trail Report. If you select Inactive you can't assign instances to, or remove instances from, the audit tag.
4. (Optional) From the related actions menu of the audit tag, access the Audit Tag > Delete Audit Tag task. You can delete the audit tag if there are no instances under it.

Next Steps

- You can assign instances of business process definitions, custom report definitions, user-based security groups, and domain security policies that you want to audit to the audit tag.
- After you assign instances to the audit tag, you can run reports that enable you to see:
  - The changes to the instance you tag.
  - The changes to the instances that the tagged instance is related to.

Set Up Audit Tag Assignments

Prerequisites

Security:

- *Audit Tag (Segmented)* domain in the System functional area.
- *Set Up: Audit Tags and Assignments* domain in the System functional area.
- *Set Up: Audit Tags and Assignments - Add Only* domain in the System functional area.

Context

You can use this task to add primary instances to, or remove primary instances from, audit tags, if you have access rights to add and remove audit tags. You can select only audit tags that belong to segments to which you have access rights.

Steps

1. Access the Maintain Audit Tag Assignments task.
2. Select the audit tag to which you want to add instances or from which you want to remove instances.

3. Access the Tagged Primary Instances to view or export details of the tagged instances. Workday lists *all* of the instances assigned to a tag whether or not you have View access to those tagged instances. If you have View access, you can view details about the instances.
    - From the related actions menu of an instance, select Audits > Maintain Audit Tags. If you have access rights, you can use this task to add audit tags to, or remove audit tags from, instances.
    - From the related actions menu of an instance, access the Audits > Add Audit Tag task. If you only have access rights to add audit tags, you can use this task to add audit tags to instances.
4. From Primary Business Object, select the business object that contains the instances you want to audit. For Security > Security Group, Workday supports only user-based security groups.

Result

Workday uses the audit tags and tagged instances to track these changes to the instances in your tenant:

- What changes to relationships and attributes occur on the tagged instance and what changes occur on the related instances.
- Whether you add, edit, or delete relationships and attributes of the instance.
- Who changed the instances.
- When you changed the instances.

Example

You want to enable your company to hire contract employees in the United States of America. You add the United States of America to the condition rule of a business process step on the Hire (Default Definition) business process.

You also want to audit the changes you made to the business process step. You create an audit tag and assign the instances you want to audit to it. For the Primary Business Object, you select Business Process Definition and for the Primary Instance you select Hire (Default Definition).

You run the Audit Trail Report to see details about the changes that you make to the business process step:

- The version of Workday in which you run the report.
- The date and time you make the change.
- The audit tag for which you run the report.
- The name of the primary business object (business process definition) and primary instance (Hire (Default Definition)).
- The class of the instance (condition item) that changes.
- The instance that changes.
- Who makes the change.
- How you make the change.

Next Steps

Use the Audit Trail Report to monitor any changes you make to the instances that you're tracking. The report returns audit entries for changes to instances that are related to the primary instance that you're auditing.

Use the Audit Tag by Tag Report to view all of the instances you tag with audit tags. The report returns all audit tags in your tenant. It also displays whether those audit tags are inactive and displays the primary instances in each audit tag.

Use the Audit Trail Configuration Report to view the relationships that Workday uses to track changes to related instances in the Audit Trail Report. This report also displays the Workday service updates in which Workday adds the relationship to, or removes the relationship from, usage on the Audit Trail Report.

Concept: Auditing

Workday enables you to view audits of transactions within your tenant. For some data, Workday uses effective dating to track transaction history. Auditors can view audit history in reports but can't make changes to these audit records.

Nondestructive Updates

Workday uses nondestructive updates to retain data and prevent data overwriting. Workday provides a complete audit trail for every change made within our business services. When you update data, the Workday business service records these changes in the secure Workday database. Only users in the *Auditor* security group can access this data.

Workday records the details of every user-made change, including the:

- New value.
- Old value.
- Person who submits the change.
- Time stamp.

Workday adds these details to the audit report. An auditor can then retrace the history of that value back to the original data entry. This process helps you enact tight controls over your data integrity for compliance requirements, including Sarbanes-Oxley Section 404.

Tracking Past or Future Data

Certain tasks enable you to specify an effective date when you create, edit, and view data.

Example: On September 20, an HR partner updates an existing job profile from Director to Vice President that is effective November 1. Anyone who views current information for the job profile sees Director until November 1. Anyone who runs a job profile report after the effective date change sees Vice President.

Workday applies this behavior to any report that requires an effective date.

Related Information
Reference
The Next Level: Audit Trails in Workday

Concept: Exception Audit Reports

Workday provides a number of exception audit reports that identify problem areas and explain the problem and solution for each exception.

Business Process Exception Audit	Workday recommends that you test changes to business processes in a preproduction tenant before migrating them to your production tenant. After you update a business process, run the Business Process Exception Audit report to find all *business process definitions* with critical errors. When you initiate a business process event, Workday checks the business process definition to determine if a persisted exception exists on the definition. When you update a business process definition such that you create an error on the definition, Workday: • Persists the exception immediately. • Prevents the business process from running.

	To provide an extra layer of safety, Workday runs a background process every hour to identify and persist all exceptions on business process definitions. These exceptions include exceptions caused by changes outside of the business process definition itself. Example: You remove a security group from a business process security policy without removing the group from the corresponding business process definition, causing an exception. If you don't edit the business process definition or run the Business Process Exception Audit report to identify the exception, the background process: • Persists the exception. • Prevents you from initiating the business process until you fix the problem. If a business process is broken, Workday automatically sends a Fix Business Process task to Business Process Administrators and provides a link to correct the business process definition.
Security Exception Audit	Security exceptions usually happen when a legitimate security configuration encounters a change in the security policy, making some access assignment invalid. Possible causes are when you activate a pending security policy change in which a: • Security policy specifies a group that you’ve deleted from Workday. • Business process security policy is missing a group that the business process still uses. Before you remove a security group from a business process security policy, remove the group from the various business processes in each organization that has a custom version defined. However: • If you don't know all the places where you’ve used a security group. • You have processes that are already running. You can still change the policy. Workday displays a warning that the change will cause an exception. The Security Exception Audit report identifies any problem area. Workday explains the problem and solution for each exception. Generally, all you have to do is remove the invalid security group from the policy or business process. For already started business processes, reassign the step that routes to an invalid user, or rescind the process. In either case, change the business process definition for that organization to specify only valid security groups.

	You can also use the Security Exception Audit report to find Intersection Security Groups that include organization-based security groups based on organization types that aren't actual Organizations. When there are unexpected security groups configured on the business process policy for these security policy actions, we display a security exception entry on the Business Process Security Policy Exceptions and Security Group Exceptions tabs: • Ad Hoc Approve • Deny • Deny (Web Service) • Manual Send Back • Request Reassignment This ensures the right person has access to the business process allowed actions by validating security groups on the business process security policy actions.
Calculated Field Exception Audit	Run the Calculated Field Exception Audit report to revalidate your calculated fields and list any errors. You can test for errors and exceptions in advance using the Evaluate Expression function, taking the appropriate action.
Integration Exception Audit	If an Integration transport protocol requires you to encrypt the outbound file, and you select not to encrypt the output, you can save the EIB. You can't run it, however, until your Security Administrator approves the exception. Once your Security Administrator overrides this requirement by: • Viewing the EIB or integration system in the Integration Exception Audit report. • Selecting Toggle Approve Unencrypted Transport as a related action. You can run the EIB an unlimited number of times. However, if you edit the EIB later, your Security Administrator must reapprove the override. You can also use the Integration Exception Audit report to: • Identify any EIBs that use the *XmlToCSV* and *XmlToExcel* transformations. • Set the Alternate Output Format to *CSV*.
Scheduled Future EIBs Exception Audit	To find scheduled EIBs that can't be launched due to insufficient security, access the Scheduled Future EIBs Exception Audit report. The report identifies EIBs that aren't runnable by the scheduled user. You can either change the security of the scheduled user or transfer ownership to another

	user. To transfer ownership, select Scheduled Future Processes > Transfer Ownership from the related actions menu of the request.
Unfilled Assigned Roles Audit	Run the Unfilled Assigned Roles Audit report to identify unfilled roles for organizations and other role-enabled items. Roles that are marked Hide on View if Not Assigned on the Maintain Assignable Roles task don't display on this report. It’s normal for inactive organizations to have unfilled roles.

Custom Report Exception Audit Reports	Workday delivers these custom report exception audit reports:
	
	• Custom Report Exception Audit, which enables you to validate report definitions. Workday displays the report owner, error severity, and problem description or solution. An empty report output indicates no errors in your reports.
	• Custom Report Exceptions by Owner, which displays custom report exceptions by report owner. Workday displays exceptions that include:
	    • Reports with terminated owners.
	    • Reports enabled as worklets but not available on any dashboards.
	    • Temporary reports past their deletion date.
	    • Reports not shared.
	    • Reports with items marked as Do Not Use.
	• Custom Reports I Can Run Exception Audit, which displays custom reports that you can run that have exceptions. Workday displays the report owner, error severity, and problem description or solution. An empty report output indicates no errors in reports that you can run.
	• Custom Reports on Menus Exception Audit, which enables you to see errors in entries for the Maintain Custom Reports on Menus task. An empty report output indicates no errors in your reports.

Additional Exception Audit Reports	Workday also provides these Exception Audit reports: • Benefits Condition Rule Exception Audit • Calculation Exception Audit • Condition Rule Exception Audit • Hierarchies with Duplicates Exception Audit • Journal Entry Exception Audit • Organization Assignment Exception Audit

- Organization Exception Audit
- Organization Type Exception Audit
- Payroll Exception Audit
- Position Group Exception Audit
- Report Specific Calculated Field Exception Audit
- Scheduled Future Reports Exception Audit
- Workers' Compensation Code Exception Audit
- Worklet Mappings Exception Audit

Reference: Auditing-Related Reports

These reports help you analyze changes made and user activity in Workday.

Audit Trail Report	*Audit Tag (Segmented)* domain in the System functional area *Set Up: Audit Tags and Assignments* domain in the System functional area *Set Up: Audit Tags and Assignments - Add Only* domain in the System functional area	This report returns audit entries for changes to instances that are related to the primary instance that you're auditing.
Staffing Activity	*Worker Data: Staffing Activity Summary* domain in the Staffing functional area	This report enables you to view a detailed list of all staffing activity in an organization within a given time period. Note: Workday recommends that you run this report on supervisory organizations and location hierarchies. If you run this report on a location hierarchy with in-progress events, use the *Staffing Activities* report data source in a custom report.
Staffing Activity Summary	*Worker Data: Headcount Reports* domain in the Staffing functional area	This report enables you to view a consolidated overview of all staffing activity in an organization. You can select any time period. Note: You can run this report on any type of organization or organization hierarchy. If you belong to an intersection security group, you might not be able to see all the organizations that it supports.
Update Audit	*System Monitoring* and *Update Audit CustomerSupport* domains	This report enables you to view updated audit information for a worker or nonworker, such as:

		• Signon and signoff times, when the Workday account changed its password, and when it used an invalid password. • Data added to or deleted from Workday, as well as how and when a user added or deleted the data. • Business process transactions.
View Audit Trail	*Customer Central Security Administration* domain in the Customer Central functional area *System Auditing* domain in the System functional area	This report enables you to view changes made in Workday over a given period of time.
View Manager History	*Self-Service: Historical Staffing Information* domain in the Staffing functional area *Worker Data: Historical Staffing Information* domain in the Staffing functional area	This report enables you to view when and where a worker held each position, in addition to the name of each manager. Note: Manager history reflects all management changes added to Workday. Workday recommends that you always enter these changes to ensure accuracy.
View User or Task or Object Audit Trail	*System Auditing* domain in the System functional area	This report enables you to view all changes made by any combination of a Workday account, transaction, and *business object* over a specified period of time. Example: You can view: • All changes made by Logan McNeil in the past year. • All changes made by Logan McNeil in the past year to custom objects. • All changes made to custom report definitions in the past year. • The number of password reset tasks run over the past month.
View Worker History	*Self-Service: Historical Staffing Information* domain in the Staffing functional area	This report enables you to view every business process or action that affects a worker, such as:

	Worker Data: Historical Staffing Information domain in the Staffing functional area	• Hire • Compensation • Stock option grant • Personal data change history The history of a worker as a contingent worker is available, if applicable.
Workday System Status	*Set Up: System* domain in the System functional area	This report enables you to identify the version of Workday that you're running for when an auditor requests this information.

Related Information

Reference

The Next Level: Audit Trails in Workday

User Activity Logging

Concept: User Activity Logging

Note: User activity logging isn't a tenant auditing function. For information on auditing functionality in Workday, see the Auditing section of this Administrator Guide.

You can enable Workday to log user activity and create a logging record.

A logging record can help you better protect personal data against security threats by enabling security administrators to view user activity over a certain time period. You can also download user activity and export it to an external processing system for analysis.

You enable user activity logging in the tenant setup to log all instances of user activity in Workday.

Note: Review your internal security and privacy (GDPR) procedures to determine how you want to use the user activity logging functionality.

The View User Activity Report

You can use the View User Activity report to view user activity in Workday over a selected time period. Alternatively, you can use the User Activity data source to create a custom report that includes specific fields you want to monitor.

For each instance of user activity, the report includes:

Field	Description
Request Time	Displays when the user activity occurred, using the time zone of the person who runs the report.
System Account	Indicates the Workday account that performed the activity. For proxy sessions, indicates the proxying Workday account and the Workday user account on whose behalf the proxy user is acting.

Field	Description
IP Address	Displays the IP address of the user from their sign-in.
User Agent	Displays the client browser and operating system information from the user sign-in.
Task	Displays the task or report that the account accessed. Workday also logs certain internal Workday operations. A task that's related to SSO permissions displays as blank.
Target	Displays the object that the account has taken action on.

Activity Category	Displays the type of activity performed:
	• READ: Access to a task or report where the user viewed but didn't change data.
	• WRITE: Access to a task where the user changed data.
	• DOWNLOAD: Access to a report that was:
	    • Downloaded by clicking or right-clicking on the file name link in Workday.
	    • Downloaded using the Excel icon.
	    • Processed in the background.
	    • Downloaded using the View Printable Version (PDF) icon.
	    • The PDF previewer.
	• OTHER: An activity by internal Workday operations.

When using the View User Activity report, consider:

Item	Considerations
Database Performance	Workday only writes to the database approximately every 2 minutes. The user activity log might not include up to the last 2 minutes of events when you view it.
Report Results	The View User Activity report only returns the first 50,000 results of a query. When run in the background, the /activityLogging REST API endpoint and the report can return up to 250,000 results.
Logging Period in Workday	Workday logs up to the last 30 days of user activity events. If the logging period exceeds 30 days, Workday removes user activity that is over 30 days old during the weekly maintenance window. We recommend that you export user activity data at least weekly. You can then monitor the throughput to ensure that you export activity

Item	Considerations
	you want to store locally for longer than 30 days. Example: Create a custom report to identify Workday data that a phished account possibly viewed or changed.

Related Information

Concepts

Concept: User Activity Logging REST API

IT Administrator Resources

Steps: Set Up Account Provisioning Groups

Context

You can use the account provisioning functionality to manage access to third-party applications for workers. You can add workers to provisioning groups from the related actions menu on a worker profile.

When you hire or terminate an employee, you typically need to request a change in their access to third-party applications. Example: You hire a new sales person and they need access to WebEx and Salesforce. If you submit the requests outside of Workday, your IT department must manage them individually. Instead, you can request access for all 10 people at once through Workday provisioning groups.

Provisioning groups provide these benefits:

- Your managers or HR staff drive the account provisioning process instead of the IT department.
- You can manage organizational changes from your enterprise HCM application.

Steps

1. Access the Create Provisioning Group task.

   Security: *Provisioning Group Administration* domain in the System functional area.
2. Access the Maintain Provisioning Groups for Person task.

   Security: *External Account Provisioning* domain in the System functional area.

Concept: Virus Scanning

Workday provides a virus scanning service that automatically scans for viruses and blocks suspicious files from uploading. Workday scans files that candidates upload through external career sites and transactional documents and nonmedia files that users upload on tasks such as:

- Add Worker Document
- Create Expense Report
- Create Supplier Invoice
- Apply to Job
- Refer a Candidate

Note: Workday uses industry-standard virus scanning tools. However, Workday doesn't guarantee that the tools scan all files or detect all viruses.

Limitations

The virus scanning service doesn't scan:

- Some media files (Example: video uploads).

- File uploads larger than 30MB.
- Files imported using web services and integrations.

Reference: Workday Acronyms

These are some common Workday acronyms found across various Workday product areas.

- AMU: Alma Mater University - A placeholder university name that you can use as you test features for the Workday Student product.
- CCTPP: Cloud Connect for Third Party Payroll.
- CLAR file: Cloud Archive file - A package file that stores assembly collections, projects, and metadata for Workday Studio integrations.
- CRF: Class Report Field.
- DC: Data Center.
- DIS: Data Initialization Service - An integration service that you can use in custom integrations to gather data from report fields in Workday. You can create, configure, and associate a DIS with integrations that are based on the *Cloud Integration Template*
- DNU: Do Not Use.
- ESB: Enterprise Service Bus.
- HCM: Human Capital Management.
- MoM: Mass Operation Management - A task that enables members of segment-based security groups to perform high-volume actions on business processes.
- NSC: Named Support Contact.
- OMS: Object Management System.
- OX: Object Transporter.
- RDS: Report Data Source.
- SAI: Student Aid Index.
- VCR: Virtual Clean Room.
- WCP: Workday Cloud Platform.
- WECI: Worker Effective Change Interface - An integration that enables you to load worker data, including time off and leaves of absence.
- WQL: Workday Query Language - A query language that enables you to use SQL-like syntax to access Workday data using data sources and fields instead of reports.

Network Connectivity

Concept: Network Connectivity

Access to Tenant

Find out important information about your tenant, including:

- The location of the servers for your tenant.
- DNS names.
- Firewalls.
- IP addresses.

You can use Secure Sockets Layer (SSL) connections for your integrations. If so, you must install any required intermediate Certification Authority (CA) certificates on your server. Workday doesn't install CA certificates on our servers. You can create a security proxy that enables an account to access a report that it would ordinarily not have access to.

Performance

To make the latest Workday files immediately available, use the *Workday File Preloader*. The loader enables you to schedule periodic updates of the files required by the user interface.

When enabled, the Content Delivery Network (CDN) improves web performance by delivering static files from third-party servers closer to users.

Related Information

Concepts

Supported Outbound SSL Certificates

Workday File Preloader

Tasks

Create Security Proxy to Grant Report Access

Reference

Workday Data Centers

Troubleshooting: Network Connectivity and Tenant Performance on page 711

Concept: Content Delivery Network (CDN)

When you initially sign in to Workday, your browser downloads and caches static content needed to run the browser user experience. Example: Fonts, images, CSS, and JavaScript used to render Workday pages. Caching this static content within your browser improves the performance of subsequent sign-ins by removing the need to download the static content again over the internet. Workday ensures the static content cached in your browser is always current by automatically downloading any updates.

When enabled, the Content Delivery Network (CDN) can speed up your initial Workday sign-in. CDN can deliver this static content from third-party servers closer to your users.

The CDN provides:

- High bandwidth, lower-latency access to static content.
- Reduced dependency on network performance between your users and Workday data centers.

Workday stores and downloads all customer data directly from Workday data centers. Customer data doesn't pass through the CDN. In the case that the CDN isn't reachable, Workday automatically reverts to downloading static files from Workday data centers instead.

Workday automatically enables the CDN in your tenant. You can disable the CDN by clearing the Enable Content Delivery Network check box in the System Setup section on the Edit Tenant Setup – System task.

Related Information

Reference

Reference: Edit Tenant Setup - System on page 164

Troubleshooting: Network Connectivity and Tenant Performance

- Proxy servers are blocking traffic to or from Workday. on page 711
- Corporate network is lagging. on page 711
- Workday tenant performance is lagging. on page 712
- Duplicate client request IDs error. on page 712

Proxy servers are blocking traffic to or from Workday.

Solution:

- Verify that you configured proxies to trust the IP range and domain names of Workday. Refer to the Workday Data Centers page for information about your tenant location, DNS names, and IP addresses.
- Verify that you aren't accessing Workday tenants or Workday servers on HTTP port 80. Workday servers use port 80 only for redirecting to HTTPS port 443.

Corporate network is lagging.

Solution: Determine if the cause of the performance lag is with your corporate network or with the Workday tenant. Sign in to the Workday tenant from outside your corporate network. If necessary, modify your authentication policies so that you can connect to Workday from outside the corporate network temporarily. We recommend that you access Workday only from secured and trusted connections and not from public access points.

If the problem continues, continue your investigation with your Workday tenants.

If the problem no longer occurs, focus your investigation on your corporate network settings:

- Remove restrictions on the number of sessions that can access your network.
- Increase the timeout settings for predefined session timeouts. Ensure they're long enough to enable all Workday reports to run to completion.
- Don't filter, modify, or otherwise alter content from the Workday tenant to your network.
- Don't override cache control headers of content from the Workday tenant to your network.

Workday tenant performance is lagging.

There are more causes and solutions to performance lag than listed here. These tools are a starting point.

Cause: You have scheduled too many processes to run at the same time. Or a particular process is using more resources than anticipated.

Solution: Access the System Health Dashboard (secured to the *System Monitor Administrator* security domain) to identify possible resource bottlenecks and adjust future schedules. When running a batch process, consider splitting it into smaller chunks or running it during off-peak hours. Example: The Data Scrambler process can take 10 hours or longer, and it isn't critical to your current project. Consider scheduling it over the weekend or during nonwork hours.

Solution: Access the Process Monitor (secured to the *My Reports* security domain). View details about specific processes and cancel the processes that are contributing to performance lag. Example: A custom integration that depends on a third-party service is using a lot of resources during work hours. To determine its performance, view the Consolidated Reports section for the process in the Process Monitor. Cancel the process, if needed.

Duplicate client request IDs error.

Cause: The HTTP sessions time for your proxy or firewall is insufficient for Workday to send large reports completely. The session times out and Workday resends the report.

Solution: Verify that you have TCP keep-alive enabled. If enabling TCP keepalive isn't possible, increase the timeout settings for the predefined session timeouts of your proxy or firewall. Ensure they're long enough to enable all Workday reports to run to completion.

Related Information

Concepts

Concept: System Health Dashboard on page 743

Reference

Reference: Process Monitor Toolbar Buttons

Workday Community: Workday Data Centers

Limitations and Availability

Reference: Workday Processing Resource Limits

Request Timed Out Errors

You might receive one of these error messages when you attempt to execute a global search or a search within a prompt, or when you select a prompt:

- Your request is taking too long to process. Please refine your search criteria or use a search prefix, and try again. If the problem persists, contact your Workday Administrator.
- Your request is taking too long to process. Please refine your search criteria and try again. If the problem persists, contact your Workday Administrator.
- 500+ Results. Search to refine.
- Http Error: Server may be down or there is a problem with your internet connection. Please try signing in again. HTTP Status Code : 400
- Http Error: Server may be down or there is a problem with your internet connection. Please try signing in again. HTTP Status Code: 520

For saved searches on reports, Example: Find Candidates, the character limit is 2652 characters (approximately 400 words).

You might receive this error message when you attempt to run a report as a worklet from a dashboard or a landing page:

- The worklet is taking too long to load. Click View Report to run the report separately from the worklet. If you have the appropriate security permissions, click Edit Settings to optimize results. If the problem persists, contact your Workday Administrator.

Workday displays these error messages when:

- A prompt contains more than 1500 items.
- Requests run for excessive amounts of time without returning results (20 seconds for searches and prompts, and 30 seconds for worklets).

Workday implements time outs to prevent you from becoming locked into tasks that don't complete in a timely manner, which can lead to degraded performance throughout your tenant.

These time-out values are selected to impact very few requests. Workday is continually improving the response time of each search, prompt, and worklet.

Related Information
Concepts

Concept: Worklet Performance

Reference: Reporting Limits

Data Sources

Workday limits the number of returned instances based on the type of report data source (RDS) you use and whether filtering applies. Filtering includes:

- Drill down filters.
- RDS filters.
- RDS security.
- Report filters.

Prefiltering refers to the limit Workday imposes before applying any filters to the report. Postfiltering refers to the limit Workday imposes after applying filters or grouping.

Report Criteria	Returned Instances Limit
Indexed RDS Prefiltering	3 million
Indexed RDS Postfiltering	3 million
Nonindexed RDS Prefiltering	3 million
Nonindexed RDS Postfiltering Pregrouping	1 million (for grouping only)
Nonindexed RDS Postfiltering Indexed report fields	3 million

If your report displays an error, consider using a different data source filter for indexed data sources or a different data source type. Example: When you use a nonindexed RDS, try using an indexed RDS instead.

For reports that use a Prism data source, Workday returns up to 1 million rows for these report types you run in the background:

- Advanced
- Matrix
- Simple
- Transposed

Prism data sources can return up to 512 MB of data. Indexed data sources (non-Prism) can return up to 2 GB of data.

Prism Data Sources

Workday limits from where you can query a Prism data source created from a Prism Analytics table that is enabled for analysis.

If the table contains more than 2,000,000,000 rows, then you can't use the Prism data source in a discovery board viz or a custom report as a worklet on a dashboard. You can use the Prism data source in a custom report that you run in the browser or in the background.

Financial Modeled Data Source

Workday limits the data it puts in the financial modeled data source when you set up the financial reporting data model.

Description	Limit
Time duration of journal line data	Up to 3 years, rolling (current year plus 2 years prior)
Maximum number of optional dimensions	15
Maximum number of values per dimension	100,000

Workday returns up to 1,000,000 cells that contain data in the query response.

Processing

Workday limits report processing to:

- 30 minutes for all reports before displaying an error. After 20 seconds, Workday enables you to schedule the report to run as a background process.
- 6 hours for background reports, scheduled reports, and web services. Workday terminates the scheduled background report if processing time takes longer.

You can enable all custom report types, except simple, to run in the background. When you create or edit a custom report, select the Background Only check box in the Report Performance section on the Advanced tab. You can also access the All Background Only Custom Reports report to view all custom reports in your tenant with the Background Only check box selected.

Discovery Board Visualizations

Workday limits viz query processing to 45 seconds and limits the returned viz data size to 50 MB. Workday displays an error in the viz if the viz query times out at 45 seconds or if the amount of data returned exceeds 50 MB. Example: A table viz fails to display if Workday returns 500 rows and each row of data contains 1 MB of data. This might happen if field values for a text field in a drop zone contain a lot of information, such as survey result data.

Viz Type	Results
Area Chart	Workday returns up to: • 100 values on the x-axis. • 250 color groupings per x-axis value, plus the Other group. • 40 million cells, whether or not the cell contains data. Empty cells don't display in a chart viz like they do in a pivot table viz. However, this limitation still applies.
Bar Chart	Workday returns up to: • 100 values on the x-axis. • 250 color groupings per x-axis value, plus the Other group. • 40 million cells, whether or not the cell contains data. Empty cells don't display in a chart viz like they do in a pivot table viz. However, this limitation still applies.
Chart	Workday returns up to: • 100 values on the x-axis. • 250 color groupings per x-axis value, plus the Other group. • 40 million cells, whether or not the cell contains data. Empty cells don't display in a chart viz like they do in a pivot table viz. However, this limitation still applies.
Donut Chart	Workday returns up to 250 color groupings, plus the Other group.
Heatmap	Workday returns up to:

Viz Type	Results
	• 100 values on the x-axis, plus the Other group. • 100 values on the y-axis, plus the Other group.
Line Chart	Workday returns up to: • 100 values on the x-axis. • 250 color groupings per x-axis value, plus the Other group. • 40 million cells, whether or not the cell contains data. Empty cells don't display in a chart viz like they do in a pivot table viz. However, this limitation still applies.
Pivot Table	Workday returns up to: • 50,000 data rows. • 12,000 row groupings (rows displayed in the pivot table). • 250 column attribute groupings. • 40 million cells, whether or not the cell contains data.
Scatterplot	Workday returns up to 250 color groupings, plus the Other group.
Table	Workday returns up to 50,000 data rows.

When you filter on a field that contains more than 5,000 values, Workday returns up to 5,000 distinct values in the Filter panel.

Scheduled Report Output

Access the Schedule a Report task to set up a schedule to run custom reports and deliver them to My Reports. You can also schedule reports to run as a single unit by grouping and bursting up to:

- 200 report groups that use an Excel template.
- 2,500 report groups that don't use an Excel template, such as a report that's in PDF or a nontemplate XLS format.

The limitation refers to the number of reports generated by the report group.

You can select 1 of these output types for the report:

- *Excel*.
- *Report (PDF)*.
- *Text (CSV)*.
- *View in Browser* for composite and matrix reports only.

Depending on the file size or number of rows returned for report results, Workday might deliver a file type other than the target Output Type you select.

Number of Rows	Supported Formats	Results
Fewer than 10,000	*Excel*, *Report (PDF)*, and *Text (CSV)*	Workday generates the report in the selected Output Type format.

Number of Rows	Supported Formats	Results
Between 10,000 and 500,000	*Excel* and *Text (CSV)*	If you select *Excel* as the Output Type format, Workday generates the report in *Excel*. If you select *Report (PDF)* or *Text (CSV)*, Workday generates the report in *Text (CSV)* format.
Between 500,000 and 1 million	*Text (CSV)*	Workday generates the report in *Text (CSV)* format.
More than 1 million	Not supported	Workday doesn't generate a report.

You can use the Process Monitor report to determine if Workday switched to another supported format, or if Workday didn't generate the report.

Reports Run in the Browser

Report Type	Results
All	• The file size limit for report results is 50 MB and 15 GB for scheduled reports. Workday limits report results to 50 MB for composite reports and matrix reports with a scheduled report output of View in Browser. • The XML string limit is 2 GB. • Workday limits tabular data processing to 5 seconds.
Advanced	Workday returns up to: • 1,000 instances. • 10,000 rows for nonsupported pagination. • 50,000 rows for reports with drill to details or supported pagination. Workday processes the Group by Field only for reports with column or row grouping if there are 1 million or fewer post-filter instances. The limit doesn't affect indexed fields.
Composite	The file size limit for composite results with a scheduled report output of View in Browser is 50 MB. Workday returns up to: • 100,000 cells. • 1,000 columns. • 16,000 rows. For reports with drill-down, Workday returns up to: • 50,000 rows for supported pagination. • 10,000 rows for nonsupported pagination.

<table>
<tr><th>Report Type</th><th>Results</th></tr>
<tr><td>Matrix</td><td>The file size limit for matrix results with a scheduled report output of View in Browser is 50 MB.

Workday returns up to:
• 250 columns.
• 12,000 rows.

In the report definition, you can add up to 15 summarization rows.

For reports with drill-down, Workday returns up to:
• 50,000 rows for supported pagination.
• 10,000 rows for nonsupported pagination.
• 80,000 drill-down cells.

For reports using Prism data sources, Workday returns up to:
• 1 million instances for count distinct aggregations.

Workday can process up to 1 million rows for reports with aggregations and up to 40 million rows for:
• Background reports.
• Scheduled reports.
• Web services.

Workday processes the Group by Field only for reports with column or row grouping if there are 1 million or fewer post-filter instances. The limit doesn't affect indexed fields.</td></tr>
<tr><td>nBox</td><td>Workday enables up to 100 images for each nBox cell.

For reports with drill-down, Workday returns up to:
• 50,000 rows for supported pagination.
• 10,000 rows for nonsupported pagination.</td></tr>
<tr><td>Search</td><td>Workday returns up to 2,000 instances.

The limit doesn't affect mass actions within search reports.

There is a limit of 300,000 instances for a single facet for search reports.</td></tr>
<tr><td>Simple</td><td>Workday returns up to:
• 1,000 instances.
• 50,000 rows.</td></tr>
<tr><td>Transposed</td><td>Workday returns up to:
• 1,000 instances.
• 50,000 rows.</td></tr>
</table>

Report Type	Results
Trending	For reports with drill-down, Workday returns up to: • 50,000 rows for supported pagination. • 10,000 rows for nonsupported pagination. • 80,000 drill-down cells. Workday can process up to: • 1 million rows for reports with aggregated rows. • 40 million rows for background reports, scheduled reports, and web services. Workday processes the Group by Field only for reports with column or row grouping if there are 1 million or fewer post-filter instances. The limit doesn't affect indexed fields.

Displaying Report Designer in the Browser

Workday limits the number of:

- Cells for multi-instance columns and fields to 1 million for composite, matrix, and trending reports.
- Top-level rows to 50,000 for all reports.

Your composite report can have an unlimited number of columns and rows. Adding more columns or rows might affect the response time of the report designer. These browser limits restrict what you see in the report designer:

Browser	Rows Displayed	Columns Displayed
Internet Explorer 11	50	20
All other browsers	200	50

Exporting to Excel

Workday adheres to these Microsoft Excel 2007 or newer limitations when exporting a composite report with outlining:

Type	Limit
Columns	16,384
Rows	1,048,576

Report Performance Logs

You can use report performance logs to troubleshoot performance issues in your reports.

Mobile Devices

You can enable dashboards and reports for mobile so that it's easier to view reporting data on Android, iPad, and iPhone devices. Managers and executives can also view metrics and key performance indicators on mobile applications.

Workday designs mobile apps for self-service, so not all reporting features are available. To access all features, sign in on a browser or desktop.

Your tenant configuration determines how dashboards and reports display. For custom reports and worklets on iPads, Workday doesn't support:

- Hiding table borders and column headings.
- Manually refreshing data. The data refreshes every time you access the report or worklet.
- Maximizing reports.
- Using 3D chart options.

For mobile devices, Workday doesn't support:

- Creating composite reports.
- Creating custom dashboards.
- Saving custom prompt values for worklets.
- Using dual-axis and combination charts.
- Viewing all or conditional formatting styles for composite reports.

Workday doesn't support these reports on mobile:

- Calendars.
- XpressO reports with 2 tabs.
- XpressO reports that use data pulled from the related business object.

Dashboard availability depends on your security configuration, but we support many Workday-delivered dashboards on mobile. To determine if Workday enables a dashboard for mobile devices:

1. Access the Maintain Dashboards report.
2. From the related actions menu of a dashboard, click Dashboard > Edit.
3. Access the Settings tab.
4. View the enabled Device Type in the Task Information section.

Related Information

Tasks

Create Report Performance Logs

Reference

The Next Level: Breaking Through With Mobile

Reference: File Size and Printing Limits

Attachment Size in Tenant Setup

When you configure your tenant, the Maximum Attachment Size is 30,720 KB (30 MB) and the Maximum Image Size is 10,240 KB (10 MB). You can't change these size limits. If you attempt to attach a file or image that is larger than these sizes, you receive an error message.

File Size in My Reports

The size of an individual compressed file that you can store in My Reports can be up to 1 GB. You can store these types of files in My Reports:

- Cloud Archive Files (used for shared Solutions).
- Output from Outbound EIBs.
- Scheduled Reports.
- Output files from Connectors and Studio integrations.

Note that you can configure Studio integrations to retrieve documents from an external location.

Printing Business Forms

The following limits apply to printing business forms based on Report Designer in Workday Studio and XSLT:

Business forms are subject to the same runtime boundaries as Studio integrations. To ensure resource availability for all customers, Workday terminates any business form printing job that:

- Takes longer than 2 hours to process. This 2-hour limit includes both the time needed to retrieve data using Reports as a Service (RaaS) and the time taken to generate the PDF document.
- Generates more than 3 GB of files during the integration run.
- Generates any single file larger than 1 GB (compressed) during the integration run.
- Uses more than 6 GB of memory during processing or 27 GB if run in bulk.

Additionally, Workday places limits on the size of files that you can load into a Workday tenant. These limits apply to report designs and the images used with business form layouts.

The 2 factors that most significantly impact the time needed to generate a PDF document for a business form are:

- The complexity of the report definition in Workday.
- The complexity of the report design in Workday Studio.

A simple report design might succeed in processing the data returned by RaaS within the 2-hour limit where a complex design would fail.

Custom XSLT transformations can consume several times the amount of memory that the source data requires.

The following limits apply to printing business forms that include attachments:

The maximum number of attachments per business form is 999. Workday supports these attachment types:

- GIF
- IEF
- JPG
- PNG
- TIFF
- BMP
- XWD
- PDF

Attachments can be in either portrait or landscape orientation. Workday doesn't support password-protected, secured, corrupted, or invalid attachments.

Large image sizes within report designs can negatively impact print job performance by reducing the number of rows processed per batch and increasing overall processing time. To prevent job failures due to memory limitations, please adhere to the following best practices.

- Remove unused images - Ensure all embedded images in the report design are actively used and remove them if not needed.
- Optimize image dimensions - Resize all the images used to the minimum dimensions required for the design page. Images should generally not exceed 600 x 800 pixels.
- Use JPG format - Utilize the preferred JPG image file format for its efficient compression, especially for photographic content.
- Test for maximum rows - Test for the maximum supported rows to avoid print job failure.

Resulting Document Expiration Offset (in days): This setting determines how long the resulting document will be available in Workday. The maximum value allowed is 25,000 days.

Printing to PDF from the Workday User Interface

When you mouse over the printer icon above a Workday report in your browser, these events can occur:

- Workday displays the message *This document is too large to produce as a printable version (PDF)*.

- The printer icon might not display above the report.

This behavior only occurs when you display a very large Workday report in your browser. Workday provides a best-effort attempt to process print requests as quickly as possible. However, Workday doesn't guarantee when a print request will complete. These factors are highly dependent on the current load on Workday and the work that needs to take place.

Note: Workday processes run on shared resources, and processing time can vary greatly depending on how many other requests Workday is processing at the same time.

Reference: Integrations and Web Service Limits

Workday limits processing of integration and web service requests as a guard against requests whose excessive processing time and/or web service calls cause a reduction in a customer's overall throughput and/or performance. The limits documented here are based on years of analysis and billions of transactions and don't normally impinge on well-functioning customer processing.

The customer can open a support case and Workday will work directly with any customer pushing up against these processing limits to understand their business requirements and to determine how to optimize their overall throughput.

Category	Limits/Boundaries
Adobe Sign Integration API Requests	API transactions for Adobe Sign vary by type of subscription. Learn more about Adobe Acrobat Sign transaction limits.
API Requests	API requests throttled under high load: • Workday Web Services (WWS) API. • Workday Reports-as-a-Service. • Workday REST API. Workday rejects API requests when other requests overload tenant resources and returns an HTTP response code of 503 Service Unavailable. If you encounter this response code, we recommend that you implement: • An exponential back-off retry mechanism for the process that generates the API requests. • Caching. For Paged API requests, avoid setting a strict HTTP timeout for page 1 requests to ensure that Workday has enough time to build a cache for subsequent calls. Page 1 requests often take longer to process, as Workday gathers all results for them and stores them in a cache. The limits for persisting the caches are: • 2 hours between paged requests • 30 minutes after you request the last page For gateway request size limits, see the Workday Web Service Requests row in this table. For Workday APIs that upload data, if a request upload stalls for too long, Workday may terminate the connection as a protective measure. The request upload idle timeout applies to a single request, and includes idle times between consecutive chunks of data.

<table>
<tr><th>Category</th><th>Limits/Boundaries</th></tr>
<tr><td>API Extract Requests</td><td>
API extract interfaces for Workday Reports-as-a-Service (RaaS).
Customers can perform these maximum extract request volumes in total across all API extract interfaces:
<table>
<tr><th>Customer Size</th><th>Maximum Requests per 24-hour Period</th><th>Maximum Requests in a single 60-minute Period</th></tr>
<tr><td>Less than 3,500 workers (ME)</td><td>75,000</td><td>15,000</td></tr>
<tr><td>Less than 10,000 workers (LE)</td><td>100,000</td><td>30,000</td></tr>
<tr><td>Less than 100,000 workers (LE)</td><td>250,000</td><td>75,000</td></tr>
<tr><td>More than 100,000 workers</td><td>350,000</td><td>100,000</td></tr>
</table>
</td></tr>
<tr><td>Connectors and EIBs: Processing Limits</td><td>
Processing limits for Workday integrations vary by type of integration (long-running or standard).

Long-running integration: all EIBs and any integrations listed in Connectors with Extended Processing Limits. The processing limit for long running integrations is 30 hours.
Standard integration: any integration that isn't long-running. The processing limit for standard integrations is 4 hours (2 hours for IMPL tenants).

For an EIB, Workday applies limits for each individual step. Example: On an outbound EIB:

On the delivery step, Workday applies the 30-hour limit.
On the data source step, Workday applies a 6-hour HTTP processing request limit for Workday Web Services and Reports-as-a-Service (RaaS).

</td></tr>
</table>

Category	Limits/Boundaries
Connectors and EIBs: Number of Concurrent Integrations	• Long-running integrations: up to 5 concurrent integrations if resources are available at that time. • Standard integrations: up to 25% of available processing capacity. Available processing capacity is capacity that is currently not in use. Long-running integrations are all EIBs and any integrations listed in Connectors with Extended Processing Limits. Important advice on queuing: The top of the hour is the most common time to schedule integrations and more likely to result in queuing at busy peak hours. Workday strongly recommends that you select a random 5 min integration start time (Example: 9:10, 9:15, 9:25).
Connectors: Runtime (including Document Transformation)	• Total for all files generated during the integration run: 3 GB (compressed). • Any single file generated during the integration run: 1 GB (compressed). • Memory used during processing: 27 GB. • Processing time: Up to 4 hours. Workday allows some connectors to run for up to 30 hours. Any pause in processing doesn't count toward the limit. • Document transformations can consume several times the amount of memory that the source data requires.
DocuSign Integration API Requests	• Hourly API call limits: 3000 by default. • Burst API call limits: 500 calls per 30 seconds. Note: These numbers are currently accurate. For more information, refer to DocuSign API Rate Call Limits or contact DocuSign directly.
EIBs: Dynamic File Names	Filenames can only be between 1-255 characters long and can’t be more than 1 line.
EIBs: Inbound Document Retention	Sixty (60) days for these troubleshooting files: • *ErrorsAndWarningsSpreadsheet.xml* • *FailureReport.html* • *OriginalDataWithErrors.xml* Workday has no retention policy for XSLT or XML spreadsheet attachments. They remain attached to their integration events indefinitely.
EIBs: Inbound File Size	• EIB spreadsheets using SFTP, FTPS, REST, Amazon Simple Storage Service: 1 GB for XML and 300MB for XLSX. • Files uploaded from a browser: 30 MB.
EIBs: Outbound Document Retention	Document Retention Policy (in Days): 180 days.

Category	Limits/Boundaries
EIBs: Runtime	Processing time for: • Outbound EIBs retrieving custom report or web service data: 30 hours. Any pause in processing doesn't count toward the 30-hour limit. • Inbound EIBs loading Workday Web Service or Custom Object data: 5 hours. • Inbound EIBs creating the Failure Report, Errors & Warnings spreadsheet, and Add Errors to Attachment spreadsheet: 2 hours.
EIBs: Runtime on EIBs with Custom XSLT Transformations	Data transformation: 27 GB. EIBs with custom XSLT transformations can consume several times the amount of memory that the source data requires. Recommendations: • Run the EIB with different filters. Use either custom report filters by maintaining launch parameters for the web service data source. • Review your custom XSLT for possible processing inefficiencies. • Convert your EIB to a Workday Studio integration.
EIBs: Spreadsheet with Data Size	• Data size: 300 MB. • Generation time: 2 hours. Workday splits output across multiple spreadsheets when: • You generate a spreadsheet with data. • The web service operation generates between 20 MB and 300MB of data. Recommendation: Filter your data by selecting Edit Template with Data Options in the Data tab of the template model.
Email Notification File Size	20 MB.
Integrations: Allow-lists for External Endpoint IP Addresses	Workday doesn't support allow lists for vendor IP addresses for integrations.
Integrations: AS2 Outbound File Size	Sending files from Workday to an external endpoint using EIB or the Delivery Service: 200 MB.
Integrations: Data Sources	• All Integration Events: 50,000 instances. • All Integration Events in Date Range: 50,000 instances. • Get all Integration Messages: 50,000 instances. • Integration Message in Date Range with Query: 10,000 instances. Workday applies these limits after the data source filters the data, but before standard or custom report filters. To optimize data extraction, Workday recommends using data sources with date ranges when applicable.

Category	Limits/Boundaries
Integrations: Integration System User Account Time Zone Limits	Integration System User (ISUs) accounts always retrieve data based on the Pacific time zone.
Integrations: Scheduled Integration Launch and Completion	Varies, depending on the resources required and integration work. Recommendation: • Don't implement an integration or external application that relies on another integration running or completing at a specific time. Instead, include the 2 integrations as steps in a business process so that the second integration launches only after the first integration completes successfully. • Contact Workday Support only if an integration consistently takes an abnormally long time to complete.
Integration Event Maximum Processing Time	7 days. Exception: ADP Payroll CSV integrations.
Integrations: HTTP Request Processing Time	6 hours, including Workday Web Services and Reports-as-a-Service (RaaS). These integrations make HTTP requests: • EIBs. • Studio integrations. • Cloud Connect integrations.
Integrations: S/FTP/S Request Time	6 hours for these requests: • FTP • SFTP • FTPS
Integrations: Document Delivery Service and Retrieval Service	• 5000 integration documents per integration run. • Total of all files generated during the integration run: 3 GB (compressed). • Single file generated during the integration run: 1 GB (compressed).
Message Queue Size	• Ten (10) message queues per tenant. • 64,000 messages per queue. • Message size: 1 GB (compressed). • All messages expire after 7 days.
Studio Integrations: Consolidated Report and Log File Retention and Size	• File retention: Sixty (60) days. • Size: 50 million characters (approximately 48 MB).
Studio Integrations: Disc Size	13 GB per integration event.
Studio Integrations: Put Integration Message Sub-Assembly	500 times in an integration event. This limit doesn't include: • Messages with attachments and targets. • Messages that change the integration event status.

Category	Limits/Boundaries
Studio Integrations: Runtime	• Total of all files generated during the integration run: 3 GB (compressed). • Single file generated during the integration run: 1 GB (compressed). • Memory used during processing: 12 GB. Integrations can use several times the amount of memory that the output files require. • Time limitation: 2 hours.
Studio Integrations: File-Backed Managed Data (FBMD) Limit	The maximum document size that a Studio integration can handle: 16 GB.
Workday Reports-as-a-Service (RaaS)	Advanced custom report enabled for web services and exposed for integrations: 2 GB.
Workday Web Service Requests	• Incoming Import web service requests: 2 GB. • All other incoming web service requests: 500 MB. • Web service responses for outbound operations: 2 GB. Workday doesn't log GET requests or unsuccessful requests. You can specify external integration HTTP headers with your requests to enable tracking in server logs.
Workday Web Services: Attachments	For SOAP and REST: • Maximum Attachment Size: 30MB • Maximum Image Size: 30MB
Workday Web Services: Currency	Decimal (total_digits, fraction_digits) • Example: *decimal (18, 6)* implies that the given SOAP API has a limit of a maximum of 18 digits with 6 of them being decimal digits. • It's a dynamic value specified in the Workday Web Services (WWS) Directory on Community under the Type/Value column.
Workday Web Services: Date	Workday uses *YYYY-MM-DD* format for date fields. When you add a time zone value to this date field, Workday removes it before persisting the field.
Workday Web Services: Date and Time	Workday uses *YYYY-MM-DDThh: mm:ss.fffZ* for zero offset from UTC. • Fff represents a fractional second. T indicates a time. Z indicates a zero offset. • Example: 2022-08-26T13:05:46.493Z • Send the requests in ISO 8601 format. • Specify any time zone offset from Coordinated Universal Time (UTC). • Provide both minutes and seconds in the time component of a datetime in a request. Seconds can have an optional fraction. • Workday returns Datetimes in ISO 8601 format. Times are in Pacific Time, either as UTC-07:00 or UTC-08:00. These options vary according to which web service API version that you use.

Category	Limits/Boundaries
Workday Web Services: HTTP Header Size and SOAP Message Size	HTTP Header size of all web service requests: 16 kilobytes (KB).
Workday Web Services: Integer	Decimal (total_digits, fraction_digits)>0 • Example: *decimal (4, 0)>0* implies that the given SOAP API has a limit of 4 digits, no fractions, and no negative numbers. *decimal (2, 1)* implies that the given SOAP API has a limit of 2 digits, 1 fraction, and negative numbers. • It's a dynamic value specified in the Workday Web Services (WWS) Directory on Community under the Type/Value column. • Workday uses integer attributes only for custom integer fields used in custom objects.
Workday Web Services: Response Size Limit	Maximum number of instances in a web service response: 1 million. You can reduce the number of instances returned by using request criteria, response filters, or date ranges. Workday doesn't log web service responses. You can specify external integration HTTP headers with your requests to enable tracking in server logs.
Workday Web Services: Rich Text String Size Limit	Maximum number of characters: 1,048,576 or 1MB.

Related Information

Concepts

Concept: External Integration Headers

Tasks

Set Up Launch Parameters for Web Service Data Source

Reference

When to Use Workday Studio

Reference: Edit Tenant Setup - System on page 164

Workday Community: Connectors with Extended Processing Limits

Reference: Presentation Services Availability

Presentation Services (also known as VPS) is the user interface platform supporting Workday features that provide external sites and user interactions with third-party REST services. This table lists the Workday features that use Presentation Services, and the impact to users in the event of an outage:

Workday Feature	Outage Impact
ADP Payroll Integration	Payroll Interface administrators can't complete the Maintain Local Payroll Data task nor access the Local Payroll Data profile group for a worker.
DocuSign Electronic Signatures	Users can't sign documents in items in My Tasks that require electronic signatures.
External Career Sites	Candidates can't access external career sites.
External Student Sites	Students can't access external student sites.
External Supplier Sites	Suppliers can't access external supplier sites.

Workday Feature	Outage Impact
Interview Scheduling using Microsoft Outlook	Recruiters can't schedule interviews with a candidate.
Media Cloud	• Administrators can't upload videos to the external career site. • Users can't edit media files in Drive.
Mobile Benefits Open Enrollment	Users can't enroll in benefits on the Workday mobile apps. Users can access benefits in the Workday browser application.
Prism	Data administrators can't access Prism data management and data discovery features.
Unsubscribe	External users can't unsubscribe from external site notifications.
Worksheets	Users can't access Worksheets.

Performance Best Practices for Large-Scale Events

Concept: Best Practices for All Large-Scale Events

Workday recommends these best practices when preparing for large-scale events to avoid impacting the performance of your tenant.

Scheduling

- Run the event task during off hours or quiet periods in your tenant.
- Access the Resource Scheduling tab on the System Health Dashboard to identify the best time. See Concept: System Health Dashboard on page 743.
- For Friday events, complete the task before the Production Maintenance window. See Scheduled Maintenance or Events.
- For long-running tasks, avoid overlap with any other major deadlines for other activities or large volume events that might impact performance.
- Review the schedule for long running background jobs, integrations, and reports that might impact performance.

Executive Dashboards and Reports

Test at the highest level of the organization that uses dashboards and reports (Example: CIO or CFO).

Communication

- Stagger communications to workers when inviting them to access Workday on a specific day.
- When possible, avoid the busiest operations days.
- When using Workday notifications, generate them during off hours.

Monitor Your Tenant

Use the System Health Dashboard to monitor the health of your tenant during critical days of your event.

Mass Advance

If you use mass advance:

- Use Mass Operations Management (MOM) to automate business process tasks for more efficiency and the best performance with large-volume mass advancing.
- Run during off hours.

Close Out Calibration

If your event uses calibration, Workday recommends that you use the Facilitate Calibration task instead of MOM to either:

- Pull the calibration task forward.
- Enable the highest-level manager to use Complete on Behalf of.

When to Open a Production Readiness Case

If you have a large event, you can work with the Workday Production Readiness team to ensure the success of your event. See Best Practices for Large Customer Events.

Reference: Event-Specific Best Practices

Consider these performance best practices as you plan large-scale events:

Event	Best Practice	Link
Calibration	• Set up the *Launch Calibration* business process for a single organization, instead of multiple organizations. • Avoid overlapping the Launch Calibration event with any major deadlines for other customer activities or large volume events. • Review the schedule for long running background jobs, integrations, and reports during Launch Calibration. nBox Reports for the Calibrate Team and Facilitate Calibration tasks • Define the nBox report to include only fields in Detail Data and necessary facets for the calibration decision process. • Minimize the use of calculated fields in the nBox report definition. • Avoid using filters defining a subset of the worker population on the nBox report. Instead, use a Calibration Program	Steps: Set Up Calibration

Event	Best Practice	Link
	Rule on the Calibration Program. • Limit the organization levels in the Restrict Organization Level View prompt, under the Calibration Program.	
Cascade Goals	• Run the Add Goals to Employees task during off hours or quiet periods. • For very large volumes of more than 100K workers, you can break up your cascade goals into smaller groups to balance the performance impact. Example: Run tasks by line of business.	Cascade Goal to Employees
Compensation Review Process	• Schedule the review period and carefully decide on the important dates: Initiation, Compensation Snapshot Dates, Organization Snapshot Date, and Effective Date. Build in extra time for auditing and to address any technical or data issues that arise. • Avoid overlap between the compensation review and any major deadlines for other customer activities or large volume events. • During the final week of the compensation review, check the schedule for long running background jobs, integrations, and reports. Compensation Statement Printouts For custom compensation statements: • Use the Workday delivered Compensation Review Employee Adjustment for Compensation Statement report data source.	Setup Considerations: Compensation Reviews

Event	Best Practice	Link
	• Don’t use other report data sources. • To create PDFs in advance, access the Release Compensation Statements task to create merit statements. Run during off hours. You can use custom layouts. • Employees can see the Compensation Review Statements on the effective date.	

Learning Campaigns	• For an audience size that exceeds 100,000, break up the audience into multiple campaigns.
	• For campaign schedules:
	    • Include specific due dates when communicating campaign deadlines.
	    • Stagger overlapping campaigns to avoid heavy-traffic for the same day.
	    • Consider other large processes to prevent conflicts with Learning consumption peaks or campaign notifications. Example: Payroll.
	    • When adding a new campaign, consider how the additional media traffic might impact the performance of ongoing media campaigns.
	    • For an audience size of 100,000, Workday recommends a minimum campaign duration of 30 days.
	• Reduce the number of triggered reminders
		Steps: Set Up and Launch Learning Campaigns

Event	Best Practice	Link

	for static campaigns. Example: A campaign with 55,000 audience members and 3 campaign items (each with a configured reminder) causes Workday to schedule 165,000 reminders.
	• Avoid learning campaign spikes in content consumption that occur at the beginning and ending of the campaign.
	  ◦ Stagger send and due dates to distribute media traffic.
	  ◦ Avoid starting a campaign on the end date of another.
	  ◦ Spread campaign email out across the work week to avoid heavy traffic on a single day.	

Mass Archive Goals	• Prepare custom reports before the mass archival to track which goals to archive, and to verify the results afterward. • Ensure your custom reports use the same conditions that will be in the goal template rules for the mass archival. • Run the reports and conduct extensive testing before running the production archival. • Archive goals in batches instead of 1 large archive job. Use the mass archival goal template rule to account for the batches. Example: Set up goal template rules to batch by organization. • Run the mass archival during off-hours to minimize impact on	Mass Archive Goals

Event	Best Practice	Link
	workers, and to reduce chances of impacting other processes at the same time.	
Mass Load Candidates	To avoid performance issues when using the *Put Candidate* web service: • Disable automatic candidate merging when creating more than 500,000 records. • Create records in batches. Example: Instead of creating 200,000 records at once, create 50,000 at a time. • Test mass loading in your Sandbox environment before loading in your tenant. • When mass loading or creating candidates, avoid using the same phone number or email for all candidates if you have enabled automatic candidate merging.	Steps: Set Up Prospects and Candidates
Open Enrollment	• Launch multiple benefit groups in 1 event, instead of launching an event for each benefit group. • Avoid overlap between the week you close open enrollment and any major deadlines for large volume events. • During the final week of open enrollment, review the schedule for long running background jobs, integrations, and reports.	Steps: Manage Open Enrollment Open Enrollment Checklist
Performance Reviews	• For very large volumes, you can break the organization into smaller groups to balance the performance impact. Example: Run the task by line of business. Using this method, you can run reports for the total population. All	Steps: Set Up Performance Reviews

Event	Best Practice	Link
	subsequent steps in the process run at the subgroup level. • Run Schedule Print for Employee Reviews for each subgroup. • For Performance Reviews with Calibration, Workday creates a separate calibration process for each subgroup. • Avoid overlap between the week that self-evaluations are due and any other major deadlines for customer activities or large volume events. • During the final week of self-evaluations, review the schedule for long running background jobs, integrations, and reports. • Access the Schedule Print for Employee Reviews task to print reviews or create PDFs in advance. Run during off hours. You can use custom layouts.	
Performance Reviews with Calibration	Use the Facilitate Calibration task instead of Mass Operations Management (MOM) to either: • Pull the calibration task forward. • Enable the highest-level manager to use Complete on Behalf of.	Start Reviews with Calibration
Purge Person Data	• Test the custom report and purge in your Sandbox environment before you purge any data in your tenant. • To avoid unintentionally purging data, always use a filter on the custom report for privacy purges. • Avoid purging more than 25,000 instances at once.	Steps: Purge Person Privacy Data

Event	Best Practice	Link
	• When applying AND and OR filter conditions, verify that the filter returns the correct data in your Sandbox environment before purging in your tenant. Example: You want to purge the candidate John Smith in London by adding a filter condition to the Name and Location fields. If you use the filter condition John Smith OR London, you purge all candidates named John Smith and all candidates based in London regardless of their names. The correct filter condition is John Smith AND London.	
Talent Reviews	• Avoid overlap between running the Update Profile step and any other large volume events. • During the final week of the Update Profile step, review the schedule for long running background jobs, integrations, and reports. • Access the Print Talent Cards for Organization task to create talent cards in advance. Run during off hours. Use custom layouts.	Steps: Manage Talent Reviews

Related Information

Reference

Workday Community: Customer Events: Best Practices and Production Readiness

Background Processes

Manage Scheduled Future Processes

Prerequisites

Security: *Scheduled Process Management* domain in the Tenant Non-Configurable functional area.

Context

You can view all background processes scheduled to run once in the future or on a recurring basis. Workday displays batch processes, integrations, and reports. You can perform these actions by accessing the related actions menu of a scheduled future process:

- Activate or suspend.
- Edit or delete.
- Restrict the environments where they run.
- Transfer ownership.
- Set the priority. Setting a higher priority can reduce potential queuing. Workday launches *Critical* priority actions first, and processes them in any order. Workday repeats this process for each lower priority category, in order of priority.

Steps

1. Access the Scheduled Future Processes report.
2. Filter the process you want to edit.
3. Select the process on the Scheduled Process column to view detailed schedule criteria.
4. Manage the process by accessing the related actions menu of the process on the Scheduled Process column.

Next Steps

You can view reports of future occurrences filtered by date or schedule by accessing these reports:

- View All Scheduled Occurrences by Date
- View All Occurrences for a Schedule

Access the Process Monitor report to view the status of all background processes that Workday is running or ran in the past.

Related Information
Reference
Reference: Scheduled Future Processes on page 740

Customize Recurrence for Scheduled Processes

Prerequisites

Set up a scheduled future process. See Manage Scheduled Future Processes on page 736.

Context

You can customize the recurrence of scheduled background processes by specifying dates and times, enabling you to set up schedules that don't follow regular intervals.

Steps

1. Access any scheduler task. Example: The Launch / Schedule Integration task.
2. From the Run Frequency prompt, select Custom Recurrence.
3. In the Custom Recurrence Criteria section, select a Default Start Time and Time Zone.
4. In the Active Custom Recurrences grid, add as many recurrences as you need in the grid. For each active custom recurrence, select a Start Date and a Custom Start Time.

   You can add a maximum of 50 custom recurrences to a schedule.

Concept: Workday Scheduled Processes

Process Monitor

You can access the Process Monitor report to view all types of background processes that are running or ran in the past. To view report and integration audit files, select the Output Files tab.

Running Multiple Processes Simultaneously

A running process doesn't stop other processes from running. Example: The Process Monitor displays that a manually launched EIB ran for 2 hours. At the same time, the Process Monitor can also display that other scheduled jobs launched between the start and stop time for the manual process.

When multiple processes run at the same time, they tend to slow each other down as they compete for the same resources. Example: A computer with 1 CPU can run multiple processes that display as running at the same time; the processes share 1 CPU.

Schedule Expiration

A schedule expires after it reaches its final run date and completes the final run. You can’t schedule a process to run more than 5 times after the end of the next calendar year. Example: If you configure a monthly-scheduled process starting in 2019, the final occurrence is in May, 2021.

When a schedule reaches its second-to-last and last occurrences, Workday notifies the owner so they can extend the schedule. You can extend a schedule from the Related Actions of the process. You can extend multiple schedules at once by accessing the Mass Update Scheduled Future Processes task.

Dependent Schedule

When configuring a schedule, the Dependent Run Frequency enables you to configure a scheduled process that runs when an existing process completes, fails, aborts, or skips. You can chain multiple dependent processes and select a time delay between dependent processes to ensure that they run smoothly.

Processing Priority

Workday processes scheduled jobs at the same priority as online user interface and web service transactions.

Process Monitor with Both Update and Read Processes

The Process Monitor doesn't visually distinguish between these types of processes:

- Update processes (processes that change data in Workday).
- Read processes (processes that don't change data in Workday).

The Process Monitor provides the status of the job based on its type.

High Load Levels

Workday doesn't delay the initiation of scheduled processes when Workday is under high load from online user interface or web service transactions. Workday assigns the same priority to:

- Scheduled processes.
- User interface transactions.
- Web service transactions.

Integration processing normally involves sending online web service requests to Workday. It's therefore possible for running integrations to produce high online load on Workday.

Initiation and Completion Times

Workday provides a best-effort attempt to initiate the process at the scheduled initiation time and processes it as quickly as resources are available. However, processes run on shared resources, and Workday doesn't guarantee when a job initiates and when the job completes. These factors depend on the current load on Workday and the work included in the scheduled process.

Daily/Weekly/Monthly Schedules and Daylight Savings Time

Daily, weekly, and monthly schedules use the time and calendar from the local time zone settings for the tenant. Example: For jobs scheduled to start on Saturday at 02:00:00, Workday initiates them when the tenant day is Saturday and time is 02:00:00. Workday initiates jobs at the specified time regardless if it’s Daylight Savings Time or Pacific Standard Time.

Note: Hourly or more frequent schedules use a fixed time interval between starts. Example: For jobs scheduled to start every 2 hours, Workday initiates them if 2 hours have elapsed since the last run, regardless of the time.

Scheduled Tasks and Time Changes

An example of a time change is when clocks shift from Pacific Standard Time to Pacific Daylight Time. Not all geolocations experience a time change, and the days these changes occur can vary by country.

If a schedule fires at most once on a given day, after a time change it continues to fire at the specified time. (Workday attempts to honor the start time, however, there can be slight delays depending on tenant load). If you have a schedule that fires every Monday at 8AM local time, the schedule fires at 8AM. The schedule time doesn't change after the time change because the cadence is daily, and the unit of measurement is a day.

If a schedule fires multiple times per day, after the time change, the schedule continues to honor the time between scheduled events. If you set a schedule to fire every hour, or every 2 hours, the schedule continues to fire according to that time interval. The time interval doesn't change, regardless of how the time change might impact the interval.

When the time changes, it might appear that a schedule start time has changed. However, the schedule is honoring the configured time between events that you've configured. Example: You configure a schedule to run once every hour. At the time change, 1:59:59AM ticks over to 1:00:00AM. In this instance, the schedule would fire as follows:

Time	Event
12:00:00AM	Schedule Fires
01:00:00AM	Schedule Fires
01:59:59AM	An hour has elapsed since the last schedule fire.
01:00:00AM (time changes)	Schedule Fires

In this instance, Workday displays 2 fire events at 1:00AM. However, the schedule has continued to fire every hour.

This schedule example shows a schedule that fires every 2 hours:

Time	Event
12:00:00AM	Schedule Fires
01:59:59AM	2 hours have elapsed since the last schedule fire.
01:00:00AM	Schedule Fires
03:00:00AM (time changes)	Schedule Fires

In this example, the schedule continues to honor the requirement that it fire every 2 hours. The same behavior in these examples holds true if the time were to move forward, rather than back. The scheduler would honor the *defined time interval*.

In summary, the scheduler attempts to honor the time interval set on the schedule. If you set a schedule to fire every X hours, it attempts to do so, regardless of how the time change might alter the exact times when those evaluations occur.

Reference: Permissions for Background Processes

To enable a user to view and abort background processes, you must configure security as follows:

Permissions	Security Group Type
View reports scheduled by self.	Self Service - Worker secured to the *Report Background Processes* domain with View access.
View and abort reports scheduled by self.	Self Service - Worker secured to the *Report Background Processes* domain with View and Modify access.
View reports scheduled by all users.	Unconstrained, secured to these domains with View access: • *Report Background Processes* • *All Background Processes*
View and abort reports scheduled by all users.	Unconstrained, secured to these domains with View and Modify access: • *Report Background Processes* • *All Background Processes*

Note: Unconstrained access to background processes enables the user to view and modify both report and other background processes.

Reference: Scheduled Future Processes

The Scheduled Future Processes report enables you to manage scheduled background processes.

Note: You must be the schedule owner to see all associated related actions.

Related Action	Description
Notification Setup > Create	Notify users when the process runs past a specified duration in minutes and then completes.
Scheduled Future Process > Edit	Edit the schedule time, recurrence interval, time zone, and other details for the scheduled process. You can extend the schedule of a process that is near its expiration date. To make edits, you must be the process owner. To transfer ownership, select Schedule Future Process > Transfer Ownership from the related actions menu of the scheduled process.
Scheduled Future Process > Edit Environment Restrictions	Select the environment in which you want the process to run. Select the Preview Only check box to apply the environment restriction to Preview tenants only. You can predefine configuration settings for

Related Action	Description
	Sandbox and Update Sandbox Preview tenants. You don't have to change these settings in the Update Sandbox Preview tenant each time Workday refreshes it from your Production tenant. Note: To avoid conflicts between environments, make any necessary changes such as changing integration endpoints, disabling notifications, or changing email addresses. When you change the environment restriction, you set the selected scheduled processes for the tenants for the selected environment type. Consider if the scheduled processes initiate external integrations or enable delays for the business process steps.
Scheduled Future Process > Change Schedule	Edit the recurrence pattern, trigger time, and date range for the scheduled request. This option is only available for future processes configured with a recurring schedule.
Scheduled Future Process > Edit Scheduled Occurrence	Change the date and time for a specific occurrence of the scheduled process. You can also select the Delete This Scheduled Launch check box to delete a specific occurrence. Note: If you make a change, we recommend that you notify your internal teams and vendors.
Scheduled Future Process > Suspend Scheduled Future Process > Activate	Suspend a scheduled process to continue to increment the recurrence at the appropriate time. Suspending the request doesn’t initiate the background process. Activate a process to resume the background process at the next appropriate time based on the recurrence schedule.
Scheduled Future Process > Run Now	Run the process and leave the scheduled event in place for future automated runs.
Scheduled Future Process >Transfer Ownership	Every process must have an assigned owner. If the Workday account for the assigned owner becomes inactive, the process can't start, and Workday sends no notifications. When you transfer ownership of a scheduled future process, the report resets to Do not share report output for both report output and shared with security groups/users. Shared reports retain the report definition shared option (for all authorized users and specific security groups or users). When you copy a custom report shared with others, the report resets to Do not share report definition.
Scheduled Future Process > Delete	Suspend active processes to delete them. You can delete expired or suspended processes to prevent future automated runs.

To manage multiple processes at once, access these additional tasks:

- Bulk Recover Scheduled Future Processes
- Mass Update Scheduled Future Processes

Related Information
Tasks
Manage Scheduled Future Processes on page 736

System Health Dashboard

Steps: Configure System Notifications

Prerequisites

Security: *System Monitor Administrator* and *Resource Scheduling Administrator* domains in the *System* and *System Health Dashboard* functional areas.

Context

You can access tasks on the View System Notifications report to create monitors that notify you when a Workday metric reaches a specified criteria.

Task	Description
Create System Monitor Notification	You can configure Workday to monitor resource usage and traffic volume. Example: You configure Workday to notify you when the user count is greater than 100.
Create Schedule Notification	You can configure Workday to monitor scheduled future processes, such as recurring processes. Example: You want Workday to monitor a process scheduled to run at 14:00:00 every Thursday and to notify you when the process fails. If you don’t see an expected object, it's because you can create alerts only for objects you have security access to.
Create BP Notification	You can configure Workday to monitor critical active processes and one-off tasks and to notify you if the job fails. Workday automatically deletes the task when it completes.

Steps

1. (Optional) As you complete the Create System Monitor Notification task, consider these options:

Option	Description
Metric Type	The resources that Workday monitors, including: • *Active User Sessions*. • *Background Queue Length*. • *Background Task Throughput*. • *UI Queue Length*.

Option	Description
	• *UI Task Throughput*.
Filter	Workday displays options in this prompt only for queue length and throughput metrics and enables you to create monitors for specific queue types, including: • *Notifications Queue Length*. • *Read Queue Height*. • *Update Queue Length*.
Direction	You can configure Workday to notify when a metric is below or greater than a specified threshold.
Threshold	Workday sends a notification when the metric exceeds the Threshold value.
Notify When Recovered	You can select this check box so Workday notifies you when the value of the metric returns to the threshold.

2. (Optional) As you complete the Create Schedule Notification task, consider these options:

Option	Description
Notifications	• Recipient Group: sends notifications to multiple recipients in a predefined group. • Notification Receiver: sends notifications to an individual.
Threshold Duration	Workday alerts you when the process runtime exceeds this value. Enter zero when you want to receive only a success or failure alert.
Background Process Status	Select for which status Workday notifies you: *Fail* or *Complete*.

3. (Optional) As you complete the Create BP Notification task, consider these options:

Option	Description
Threshold Duration	Workday sends you an alert if the process runtime exceeds the threshold value. Enter zero if you want to receive only a success or failure alert.
Background Process Status	Select for which status Workday notifies you: *Fail* or *Complete*.

Result

Workday displays the active configured notifications on the View System Notifications tab.

Concept: System Health Dashboard

The System Health Dashboard provides visibility into the resource usage and workload of your tenant. It includes tools that enable you to monitor critical processes and to identify and mitigate resource bottlenecks.

Security: *System Monitor Administrator* and *Resource Scheduling Administrator* domains in the *System* and *System Health Dashboard* functional areas.

System Monitor

Workday displays visualizations of tenant metrics on the System Monitor tab, including the number of active users, running tasks, queued tasks, and degraded tasks. Degraded tasks are processes that Workday throttles in order to preserve the performance of your tenant.

View System Notifications

You can create alerts that notify you when:

- Workday metrics rise above or fall below a specified threshold.
- A scheduled process runs too long.

Example: You set an alert for Workday to notify you when Data Backup runs for longer than 300 minutes.

System Snapshots

The System Snapshots task enables you to create snapshots of your tenant metrics so you can capture and analyze Workday activity. Workday stores snapshots in the System Snapshots report for 90 days. Customer support uses these snapshots to view Workday metrics, enabling more efficient collaboration and issue investigation.

Resource Scheduling

You can access the Resource Scheduling report to view projected tenant loads and to mitigate resource bottlenecks for integrations, jobs, and reports.

Workday uses data from historical runs to display a grid that visualizes your projected quantity of tasks for integrations, jobs, and reports over a period of time. Drill down on a time segment to display the projected number of tasks starting or running in that segment.

Background Process Trends

You can access the Background Process Trends report to:

- View a tally of active, completed, and failed processes. You can further filter by start and end date and time, and process type.
- View the performance and trend for background processes over the last 24 hours.

The Background Process Trends report displays information similar to the Process Monitor report. However, Workday doesn't restrict the information that this report displays based on your security.

Related Information
Reference
Reference: System Health Dashboard

Concept: System Monitor Task Drill-Down

On the System Monitor, you can view details about:

- All Tasks.
- Queued Tasks.
- Active User Sessions.

Task Drill-downs

In All Tasks, you can select a task, and click Kill Task to end the task.

Additional Information in Drill-down Table

Column	Description
CPU Time	This number can be greater than the task duration. Example: When a process runs concurrently on 4 CPU threads for 20 milliseconds, Workday displays a CPU time of 80 milliseconds and a task duration of 20 milliseconds.
Memory Allocation (MB)	Displays the amount of memory allocated to perform a task or process. In the event of garbage collection on the task, the memory allocation includes the garbage-collected memory.
Instances Accessed	The number of instances accessed.
Queued Subtasks Running Subtasks	Most UI tasks have a single subtask while most integrations and jobs have multiple subtasks.

Active User Sessions Details

You can view the drill-down information displayed by Request Originator or System Account. You can further run a report to display the sign-ons and attempted sign-ons for System Monitor.

Related Information
Concepts
Concept: System Health Dashboard on page 743

Implementation Tools

Concept: Reference ID Management for Object Migration

It's important to manage Reference IDs as you migrate objects between tenants. Object Transporter assumes that 2 object instances with the same Reference ID and Reference ID Type are identical.

Best practice is to give parent and dependent objects Reference IDs that are unique across all of your tenants, and to do so before their first migration. When an object has the same Reference ID in all of your tenants, you can easily migrate changes made to it in 1 tenant to a different tenant.

Use the Integration IDs report to find current Reference ID values for one or more object types.

Use the Maintain Reference IDs task to make bulk changes.

Related Information
Concepts
Concept: Reference ID Maintenance

Reference: Migration Implementation Tools

Use the table to help you decide which implementation tool is best for your migration needs.

Implementation Tool	Primary Migration Use Case
Object Transporter (standalone) • Single instances • Configuration packages (also known as standard configuration packages)	Use Object Transporter directly (from the Migrate with Object Transporter task or related action) to migrate specific configuration objects and their

Implementation Tool	Primary Migration Use Case
• Security configuration packages	dependencies at once. It's the proven method for migrating isolated changes. Use case examples: • Migate one or more custom reports. • Migrate specific business process definitions. Benefits: • Includes every dependent component of an object, ensuring that your object migrates completely, even with complex dependencies. • For many, it's the most familiar migration tool. Limitations: • Only supports objects listed in the Object Transporter Supported Objects (OX) report. • Less efficient for migrations of large projects with many unrelated changes.
Configuration Change Tracker	Use Configuration Change Tracker for project-based work. Use case example: Save project work for sandbox refreshes. In Configuration Change Tracker, create a configuration package of the changes you want to change in your tenant. Then, create a configuration extract of the package, download it locally until the tenant refresh completes, and reload the package to the refreshed tenant. Benefits: • Captures a wide scope of work based on users and time, simplifying project migrations. • Supports all implementation types. • Easily enables you to save configuration changes in a Development or Sandbox tenant. Limitations: • Doesn't add missing dependencies. If a user makes a required change in a timeframe other than that which you select, Workday doesn't migrate the change, potentially causing migration failures. • Requires a well-defined and disciplined development process to ensure that necessary changes are captured.
Configuration Extracts	Use configuration extracts when you need to store configurations externally from the tenant.

Implementation Tool	Primary Migration Use Case
	Use case examples: • Create offline backups of project work. • Share configurations with other teams. • Reload a configuration to the same tenant after a refresh. Start with Configuration Change Tracker and create a configuration package of the changes you want to change in your tenant. Then, create a configuration extract of the package, download it locally until a tenant refresh completes, and reload the package to the refreshed tenant.

Related Information

Concepts

Concept: Implementation Tool Personas on page 747

Tasks

Manage Access to Customer Central Implementation Tools on page 750

Reference

Reference: Tenant Security Requirements By Persona on page 753

Security for Implemenation Tools

Concept: Implementation Tool Personas

We recommend that you create personas to best use implementation tools in Workday. Although you don’t assign personas in Workday, you can configure security for each implementation tool user depending on the persona you’ve established for them.

A user's persona determines whether they can manage changes made by any user in the tenant, or only the configuration changes they personally create. Establishing the correct persona ensures that users have only the access they need to perform their specific implementation or administrative functions.

Implementation tool personas enable you to define who accesses these tools and to what extent they can use the features:

- Configuration Change Tracker
- Object Transporter
- Configuration Extracts
- Tenant Compare

By determining these personas, you can enforce granular security controls for configuration changes in your tenant environments. You determine a user's persona by these main factors:

Factor	Description
Core capabilities	What tenant configuration management jobs a user has, such as auditing or comparing, packaging, and migrating tenant changes.
Scope	• What configuration changes a user can access. • The type of configuration package the user can migrate.

Factor	Description
Special permissions	When the user has 1 or both of these responsibilities: • Migrates security policy changes. • Extracts configurations from tenants. • Loads extracted configuration files to tenants.

Process for Building Personas

As a best practice before you configure user access to implementation tools or their domain security in tenants, determine the persona of each implementation tool user. After you determine the personas, you'll more readily know which domains to secure and which levels of access to select on the Maintain Access to Customer Central Tooling task. Workday recommends that you develop and refine personas in this sequence:

1. Determine the core capabilities for implemenation tool users.
2. For Auditor or Packager personas, refine their persona to include the scope of their responsibilities.
3. For Migrator or Power User personas, refine their persona to include the type of packages they can migrate.
4. Determine whether any implementation tool users need additional permissions.

Determine Core Capabilities

You can start building personas by determining each implementation user's configuration management responsibilities across tenants. Use the table to match each user's responsibilities with a core capability. A user may have more than 1 responsibility.

User Responsibility	Core Persona
Monitor and review changes Views and tracks configuration changes but can't package or migrate them. They are a "look, don't touch" user. They can create their own reports.	Auditor
Manage Configuration Packages (create and edit) Builds and modifies (creates and edits) configuration packages but can't migrate them to other tenants.	Packager
Migrate packages Deploys existing packages across tenant environments, but doesn't necessarily create or edit them.	Migrator
All of the above Views, creates, edits, and migrates packagess. This is a combination of all capabilities.	Power User

Determine Scope for Auditors and Packagers

For each implementation tool user who has a core capability of Auditor or Packager, refine the persona further to include the scope of their responsilbity for managing changes in the tenant.

Use the table to match scope of responsibility with a refined persona that includes scope.

User Scope	Scope Persona
User as self The user only needs to work with their own changes and packages.	Self Auditor Self Packager
Any user The user also needs to view other users' changes or use others' packages.	Global Auditor Global Packager

Determine Scope for Migrators and Power Users

For each implementation tool user with an Migrator or Power User persona, determine whose packages they can migrate and the type of package they can handle.

Use the table to match scope of responsibility and package type with a refined migration persona.

User Scope for Packages	Type of Packages	Migration Persona
User as self The user only needs to migrate their own single instances and packages with Object Transporter.	Standard packages only	Traditional Self Migrator
User as self The user also needs to migrate their own Advanced packages with Configuration Change Tracker.	Standard packages in Object Transporter Advanced packages in Configuration Change Tracker	Advanced Self Migrator
Any user The user only needs baseline access to migrate other's OX-enabled configurations, in which Object Transporter adds necessary dependencies at the time of migration. This means users don't necessarily know all the dependencies that Object Transporter will migrate before migration starts.	Standard packages only	Traditional Global Migrator
Any user In addition to thier own and others' instances and standard packages, the user also needs to migrate other users' Advanced packages with with Configuration Change Tracker	Standard packages in Object Transporter Advanced packages in Configuration Change Tracker	Advanced Global Migrator

Determine Special Permissions

Determine whether any implementation tool users need added permissions. Workday requires additional access to security configuration packages and configuration extracts.

Use the table to map additional permissions to Add-On roles.

Add-On Permission	Add-On Role
Security configuration packages The user needs to migrate security policies.	Add-On Security Migrator
Configuration file extracts The user needs to extract configurations from a tenant. Example: Users may need to extract configurations while Sandbox tenants refresh.	Add-On Configuration Extractor
Configuration file loads The user needs to migrate (load) extracted configurations. Example: Users may need to load extracted configurations to the Sandbox tenant after a refresh	Add-On Configuration Extract Migrator

Related Information
Reference
Reference: Tenant Security Requirements By Persona on page 753
Reference: Migration Implementation Tools on page 745

Manage Access to Customer Central Implementation Tools

Prerequisites

Customer Central security administrator account.

Context

You can use a single task, Maintain Access to Customer Central Tooling, to manage user and administrator access to these Customer Central implementation tool tasks and actions:

- Migrate configuration packages with Object Transporter
- Create configuration extracts
- Migrate configuration extracts
- Migrate security configuration packages
- Create and view Tenant Compare reports
- Migrate only single instances, or instances packaged from the user or administrator's Configuration Change Tracker report.

The Maintain Access to Customer Central Tooling task replaces the previous set of Customer Central access management tasks. When you access any of those tasks, Workday now redirects you to the Maintain Access to Customer Central Tooling task.

Steps

1. Sign in to Customer Central as a Customer Central security administrator.
2. Access the Maintain Access to Customer Central Tooling task.

   You can also access this task from the related action menu of any Customer Central user or administrator.

3. In the row that contains the user or administrator whose access you want to manage, complete the task:

Option	Description
Create Configuration Extracts	Select the check box to enable the user or administrator to create configuration extracts using the Create Configuration Extract task. Enabling users and administrators with this check box replaces the need to grant access to them through the Maintain Access to Migrate Configuration Extracts task. If you access the Maintain Access to Migrate Configuration Extracts task, Workday redirects you to the Maintain Access to Customer Central Tooling task.
Migrate Configuration Extracts	Select the check box to enable the user or administrator to migrate configuration extracts (.dat files) using the Migrate Configuration Extract task. Enabling users and administrators with this check box replaces the Maintain Access to Migrate Configuration Extracts task. If you access the Maintain Access to Migrate Configuration Extracts task, Workday redirects you to the Maintain Access to Customer Central Tooling task.
OX Migration: Full Object Coverage	Select the check box to enable the user or administrator to create Advanced configuration packages from Configuration Change Tracker. When selected, this check box enables package creators to add any object with a migratable implementation type to their configuration package. Configuration Change Tracker only enables you to create packages with migratable implementation types. When not selected, package creators must add only supported implementation types as reported in the Object Transporter Supported Objects (OX) report. When Object Transporter migrates Advanced configuration packages, it migrates only the instances in the package. It doesn't add other dependent instances after migration starts, as it does with traditional configuration packages. Migrators can streamline the handling of dependencies by starting migration from Configuration Change Tracker reports.
Migrate Security Configuration Packages	Select the check box to enable administrators and users to migrate domain and business process security policies using the Create Security Configuration Packages task.

Option	Description
	Enabling users and administrators with this check box replaces the Maintain Access to Migrate Security Configuration Packages task. If you access the Maintain Access to Migrate Security Configuration Packages task, Workday redirects you to the Maintain Access to Customer Central Tooling task.
Create & View Tenant Compare Reports	Select the check box to enable users and administrators to use these tasks and reports to create and view Tenant Compare reports: • Create Tenant Compare Report • View Tenant Compare Report • View All Tenant Compare Reports Enabling users and administrators with this check box replaces the need to grant access to them through the Maintain Access to Tenant Compare task. If you access the Maintain Access to Tenant Compare task, Workday redirects you to the Maintain Access to Customer Central Tooling task.
Limit Object Transporter Access	Select this check box to restrict users or administrators from migrating configuration packages. The check box to enable users or administrators to migrate only the instances to which they have access, allowing them to migrate • Single instances, using the Migrate with Object Transporter task from the related action menu of an object instance. • Instances from their own Configuration Change Tracker reports. This access limitation ensures that users and administrators can migrate only their own configuration changes.

4. Click OK.

Result

The users or administrators for whom you've selected check boxes can now perform the tasks and actions that you've enabled.

Related Information

Tasks

Migrate Configuration Extracts on page 822

Examples

Example: Set Up Security for an Implementation Tool Power User on page 755

Reference: Tenant Security Requirements By Persona

This table lists the security requirements in Workday for each implementation tool persona. Use the table to match user personas with implementation tool security requirements.

Users often have multiple responsibilities so you may need to combine permissions from several rows to match configuration management responsibilities. You add implemenation tool users to domain security policies in source and target tenants. In the Customer Central tenant, you set up tool access for them on the Maintain Access to Customer Central Tooling task.

Persona, Tool, and Responsibilities	Source Tenant Securitiy Domains	Target Tenant Security Domains	Customer Central Security
Self Auditor Configuration Change Tracker: • Creates their own reports • Views only their own changes.	View and Modify permissions: • *Manage: Configuration Change Management - Restricted*	None	None
Global Auditor Configuration Change Tracker: • Creates their own reports and views their own changes. • Views other users' changes.	View, Modify, Get and Put permissions: • *Configuration Change Management*	None	None
Global Auditor Tenant Compare: • Compares configurations across tenants.	View and Modify permissions: • *Configuration Change Management* Get permissions: • *Special OX Web Services*	View and Modify permissions: • *Configuration Change Management* Get permissions: • *Special OX Web Services*	Check box on the Maintain Access to Customer Central Tooling task: • Create & View Tenant Compare Reports
Self Packager Configuration Change Tracker: • Creates and edits packages from their own reports.	View, Modify, Get, and Put permissions: • *Manage: Configuration Change Management - Restricted* • *Manage: Configuration Change Management Migrations - Restricted*	None	

Persona, Tool, and Responsibilities	Source Tenant Securitiy Domains	Target Tenant Security Domains	Customer Central Security
	View and Modify permissions: • *OX for Non-Implementers*		
Global Packager Configuration Change Tracker: • Creates and edits packages from their own reports. • Creates and edits packages from others' reports.	View, Modify, Get, and Put permissions: • *Manage: Configuration Change Management Migrations* • *Configuration Change Management* *OX for Non-Implementers*	None	
Traditional Self Migrator Object Transporter • Migrates their own single instances.	View, Modify, Get, and Put permissions: • *OX for Non-Implementers* • *Special OX Web Services*	View, Modify, Get, and Put permissions: • *OX for Non-Implementers* • *Special OX Web Services*	Check box on the Maintain Access to Customer Central Tooling task: • Limit Object Transporter Access
Traditional Global Migrator Migrates: • Their own single instances and standard packages • Others' single instances and standard packages.	View, Modify, Get, and Put permissions: • *OX for Non-Implementers* • *Special OX Web Services*	View, Modify, Get, and Put permissions: • *OX for Non-Implementers* • *Special OX Web Services*	None
Advanced Self Migrator Configuration Change Tracker • Migrates their own single instances and Advanced packages.	View, Modify, Get, and Put permissions: • *OX for Non-Implementers* • *Special OX Web Services* • *Manage: Configuration Change Management Migrations - Restricted*	View, Modify, Get, and Put permissions: • *OX for Non-Implementers* • *Special OX Web Services* • *Manage: Configuration Change Management Migrations - Restricted*	Check boxes on the Maintain Access to Customer Central Tooling task: • The OX Migration: Full Object Coverage • Limit Object Transporter Access
Advanced Global Migrator	View, Modify, Get, and Put permissions:	View, Modify, Get, and Put permissions:	Check box on the Maintain Access to

Persona, Tool, and Responsibilities	Source Tenant Securitiy Domains	Target Tenant Security Domains	Customer Central Security
Configuration Change Tracker Migrates: • Their own single instances and Advanced packages. • Others' single instances and Advanced packages.	• *OX for Non-Implementers* • *Special OX Web Services* • *Manage: Configuration Change Management Migrations*	• *OX for Non-Implementers* • *Special OX Web Services* • *Manage: Configuration Change Management Migrations*	Customer Central Tooling task: • The OX Migration: Full Object Coverage
Add-On Security Migrator Security Policy Migration • Migrates security configurations.	View, Modify, Get, and Put permissions: • *OX for Non-Implementers* • *Special OX Web Services*	View, Modify, Get, and Put permissions: • *OX for Non-Implementers* • *Special OX Web Services*	Check box on the Maintain Access to Customer Central Tooling task: • Migrate Security Configuration Packages
Add-On Configuration Extractor Configuration Extracts • Extracts configuration packages to a file.	None	None	Check box on the Maintain Access to Customer Central Tooling task: • The Create Configuration Extracts
Add-On Configuration Extract Migrator Configuration Extracts • Loads extracted configuration files to tenants.	None	None	Check box on the Maintain Access to Customer Central Tooling task: • The Migrate Configuration Extracts

Related Information

Concepts

Concept: Implementation Tool Personas on page 747

Reference

Reference: Migration Implementation Tools on page 745

Example: Set Up Security for an Implementation Tool Power User

This example illustrates how to set up domain security and implementation tool access for a Global Advanced Power User with additional permissions.

Context

You've established a persona of Global Advanced Power User for a user based on these tenant configuration management responsibilities:

- Views other user's configuration changes.
- Compares configurations across tenants.
- Creates and edits their own and other's configuration packages.
- Migrates their own and other's standard configuration packages from Object Transporter.
- Migrates their own and other's Advanced configuration packages from Configuration Change Tracker.

The user also needs permissions to:

- Extract and load configuration extract files for Sandbox refreshes.
- Migrate security configuration packages.

These add-on responsibilities require these roles:

- Add-On Security Migrator.
- Add-On Configuration Extractor.
- Add-On Configuration Extract Migrator .

Workday requires user-based security groups for the domain security policies for the implementation tools. You decide to create a single user-based security group called Global Advanced Power Users. To plan your work, you create a source and target tenant security setup table to note the domain configurations required for each tenant.

Tenant	Security Domains and Permissions
Source	View and Modify, Get, and Put permissions: • *Configuration Change Management* • *Manage: Configuration Change Management Migrations* • *OX for Non-Implementers* • *Special OX Web Services*
Target	View and Modify, Get, and Put permissions: • *Manage: Configuration Change Management Migrations* • *OX for Non-Implementers* • *Special OX Web Services* View and Modify permissions only: • *Configuration Change Management*

You also create a Customer Central tenant security settings table to note the check boxes you must select for the power user on the Maintain Access to Customer Central Tooling task.

User Access	Check Box Selection
Migrate Advanced configuration packages in Configuration Change Tracker.	OX Migration: Full Object Coverage
Compare configurations between tenants in Tenant Compare.	Create & View Tenant Compare Reports
Extract configuration files (.dat) using Configuration Extracts.	Create Configuration Extracts
Load configuration files (.dat) using Configuration Extracts.	Migrate Configuration Extracts
Migrate security configuration packages.	Migrate Security Configuration Packages

The order for security setup in each tenant doesn't matter. You decide to set up security in the source tenant first, followed by the target tenant, and then the Customer Central tenant.

You follow this overall process:

1. Create a security group: Global Advanced Power Users.
2. Grant permissions to the security group .
3. Add the user to the security group.
4. Configure power user access to Deployment Tools in Customer Central.

Prerequisites

Read:

- Concept: Implementation Tool Personas on page 747
- Reference: Tenant Security Requirements By Persona on page 753

Source and target tenants:

- Security:*Security Configuration* domain in the System functional area.

Customer Central tenant:

- Set up a Customer Central account for the user using Workday naming conventions.

  See Steps: Set Up Customer Central Accounts on page 763 andConcept: Customer Central Account Naming Conventions on page 771.
- Provide tenant access to the user.

  See Steps: Set Up Customer Central Tenant Access on page 773.

Steps

1. Sign in as a security administrator to the source tenant for the power user.
2. Create a security group for Global Advanced Power Users.
   a) Access the Create Security Group task.
   b) On the Type of Tenanted Security Group prompt, select *User-Based Security Group*.
   c) Enter the name, *Global Advanced Power Users*.
   d) Click OK and then OK again.
   e) Click Done.
3. Access the Global Advanced Power Users security group:
   a) Access the Maintain Permissions for Security Group task.
   b) On the Source Security Group prompt, select *Global Advanced Power Users*.
   c) Click OK.
4. Add rows with these values to the Domain Security Policy Permissions grid:

View/Modify Access	Domain Security Policy
View and Modify	*Configuration Change Management*
Get and Put	*Configuration Change Management*
View and Modify	*Manage: Configuration Change Management Migrations*
Get and Put	*Manage: Configuration Change Management Migrations*
View and Modify	
Get and Put	*OX for Non-ImplementersOX for Non-Implementers*

View/Modify Access	Domain Security Policy
View and Modify	*Special OX Web Services*
Get and Put	*Special OX Web Services*

5. Click OK and then Done.
6. Access the Activate Pending Security Policy Changes task to activate your changes.
    a) Enter this comment to provide an audit trail of your changes: *User-Based Security Group: Global Advanced Power Users.*
    b) Click OK .
    c) Select the Confirm check box.
    d) Click OK.
7. Access the Assign User-Based Security Groups for Person task.
    a) On the Person prompt, select the user and click OK.
    b) On the User-Based Groups to Assign prompt, select the Global Advanced Power Users group.
    c) Click OK and then Done.
8. Sign in as a security administrator to the target tenant for the user.
9. Create a security group for Global Advanced Power Users.
    a) Access the Create Security Group task.
    b) On the Type of Tenanted Security Group prompt, select *User-Based Security Group*.
    c) Enter the name, *Global Advanced Power Users*.
    d) Click OK and then OK again,
    e) Click Done.
10. Access the Global Advanced Power Users security group:
    a) Access the Maintain Permissions for Security Group task.
    b) On the Source Security Group prompt, select *Global Advanced Power Users*.
    c) Click OK.
11. Add rows with these values to the Domain Security Policy Permissions grid:

View/Modify Access	Domain Security Policy
View and Modify	*Manage: Configuration Change Management Migrations*
Get and Put	*Manage: Configuration Change Management Migrations*
View and Modify	*Configuration Change Management*
View and Modify	*OX for Non-Implementers*
Get and Put	*OX for Non-Implementers*
View and Modify	*Special OX Web Services*
Get and Put	*Special OX Web Services*

12. Click OK and then Done.
13. Access the Activate Pending Security Policy Changes task to activate your changes.
    a) Enter this comment to provide an audit trail of your changes: *User-Based Security Group: Global Advanced Power Users.*
    b) Click OK.
    c) Select the Confirm check box.
    d) Click OK.

14. Access the Assign User-Based Security Groups for Person task.
    a) On the Person prompt, select the power user and click OK.
    b) On the User-Based Groups to Assign prompt, select *Global Advanced Power Users*.
    c) Click OK and then Done.
15. Sign in to Customer Central as a Customer Central security administrator.
    a) Access the Maintain Access to Customer Central Tooling task.
    b) Select these check boxes for the power user:
        - Create Security Configuration Packages
        - OX Migration: Full Object Coverage
        - Create Configuration Extracts
        - Migrate Configuration Extracts
        - Create & View Tenant Compare Reports
    c) Click OK.

Related Information

Concepts

Concept: Implementation Tool Personas on page 747

Tasks

Manage Access to Customer Central Implementation Tools on page 750

Reference

Reference: Migration Implementation Tools on page 745

Customer Central

Setup Considerations: Customer Central

Note: The solutions described in this section are not part of the Workday Service. See Legal Notice for details.

You can use this topic to help make decisions when planning your configuration and use of Customer Central. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Customer Central is a separate Workday tenant designed to streamline the deployment process. It enables the extraction, comparison, and migration of data from your Workday tenants during implementation and ongoing tenant configuration changes.

Workday automatically provides new customers with a Customer Central tenant. It's available at no additional cost and isn’t part of the Service. Data stored in Customer Central isn't considered Customer Data.

Integral to Customer Central is Workday Object Transporter. It’s Workday's technology for migrating user-generated packages, Workday-delivered packages, or single instances between tenants, saving you time and effort during implementation and beyond. Object Transporter requires Customer Central for migration, although you can begin the migration process on your source tenant. From the source tenant, Workday redirects you to Customer Central to complete the migration.

Business Benefits

Customer Central simplifies and centralizes the deployment process, enabling you to get features up and running with more speed and less effort. It provides a single platform that you can use to:

- Manage tenants.
- Enrich tenants with prepackaged configurations.
- Manage implementer and customer accounts.

Use Cases

You can use Customer Central to migrate Workday-built configurations that help you to deploy specific features. Example: Your company is about to open an office in France. You can use the Configuration Catalog in Customer Central to migrate:

- French Time Off Plans.
- Payslips.
- HCM configurations like Citizenship Statuses, Military Statuses, and Local Termination Reasons.

Questions to Consider

Questions	Considerations
Does your organization already have a Customer Central tenant?	As of January 2018, all new Workday customers automatically receive a Customer Central tenant. Older customers can request one through Workday Customer Center. You only need 1 Customer Central tenant. If no one in your organization can access your Customer Central tenant, open a tenant management case with Customer Support.
Which individual in your organization will be responsible for initiating the Customer Central setup process?	A Named Support Contact in your organization is responsible for managing and delegating Customer Central Security Administrator accounts. The Named Support Contact uses the wd-tenantowner account to create the Customer Central Security Administrator and Customer Central Administrator accounts. Customer Central Administrators, in turn, create Customer Central users.
How many Customer Central Security Administrator and Central Administrator accounts will you create?	Customer Central requires these administrator accounts: • Customer Central Security Administrator account. • Customer Central Administrator account. If you engage implementation consultants and external deployment partners, Workday recommends that your organization has at least 2 of these accounts: • Customer Central Security Administrator. • Customer Central Administrator.

Questions	Considerations
	Maintain ownership of credentials for these additional accounts within your organization. This approach means you can regain control of the tenant after the deployment partner has rolled off your initial Workday deployment project. In the event of lost credentials, open a tenant management case with Customer Support. Administrators who plan to use Customer Central Security Administrator accounts must ensure that the account ID is unique across Workday tenants. Administrators who have a Customer Central Administrator account don't need to create a Customer Central User account for themselves.

Recommendations

Workday recommends that you:

- Assign at least 2 Customer Central Security Administrator and 2 Customer Central Administrator roles to individuals in your organization.
- Select the Enable Forgotten Password Reset check box in Edit Tenant Setup - Security task.
- Include an email address in the Customer Central User contact details. Workday uses this address when a user requests a password reset.

Requirements

Each Customer Central tenant includes a preconfigured account called wd-tenantowner, which configures the other required accounts. The wd-tenantowner account automatically deactivates 60 days after Workday provides its credentials to the customer. You must create the other required accounts before that happens.

If you don't create the required accounts before the wd-tenantowner account deactivates, your NSC must open a tenant management case with Customer Support to reset the tenant.

Limitations

The Customer Central Administrator can use the Manage Tenant Access task to control user access to the tenants connected to Customer Central. However, this task doesn't override the security in those other tenants. To perform operations involving tenants, a user must have the appropriate access in the tenant concerned.

Example: You use the Manage Tenant Access task to grant a user the ability to migrate custom reports between tenants. However, the user doesn't have permission to access the target tenant from Customer Central and therefore can't select it from the tenant menus in Customer Central.

Tenant Setup

Enable the forgotten password reset option. Doing so will enable Customer Central users, including Administrators and Security Administrators to reset their passwords.

Security

Customer Central has a unique security model in which Workday sets specific roles and permissions automatically that you can't change. This model means that a single account can't have multiple roles.

Business Processes

No impact.

Reporting

The Object Transporter Supported Objects (OX) report details which objects you can migrate.

The View Configuration Catalog Content report enables you to examine the contents of the configuration packages that are available for migration.

The Tenant Health dashboard displays information relating to:

- User access to Customer Central.
- Multifactor authentication for implementation and sandbox tenants.

Integrations

No impact.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Concepts

Concept: Customer Central Security Model on page 770

Tasks

Steps: Migrate Packages with Object Transporter on page 783

Reference

Deployment and Optimization Tools

2022R1 What's New Post: Object Transporter 2.0

Concept: Customer Central

Customer Central is a separate Workday tenant designed to simplify and centralize the deployment process. It provides a platform for the tooling that implementers and customers use to:

- Manage tenants.
- Compare data between tenants.
- Migrate configurations between tenants using Object Transporter.
- Migrate Workday-delivered content from Configuration Catalog using Object Transporter.
- Control who migrates Security Configuration Packages with Object Transporter.
- Enrich tenants with factory default configurations.
- Manage implementer and customer accounts.

As of January 2018, Workday automatically provides new customers with a Customer Central tenant. Older customers can request one in the Workday Customer Center. See Tenant Management Requests for details. In both cases, Customer Central is available at no additional cost.

Note: Customer Central isn’t part of the Service and data stored in Customer Central isn’t considered Customer Data.

Related Information

Concepts

Concept: Customer Central Users on page 768
Concept: Customer Central Security Model on page 770

Tasks

Steps: Set Up Customer Central Accounts on page 763

Steps: Set Up Customer Central Tenant Access on page 773

Reference

Deployment and Optimization Tools

Concept: Configuration Catalog

Configuration Catalog is a Customer Central feature that enables customers and implementers to migrate Workday-provided content to implementation and sandbox tenants using Object Transporter at no cost. This content comprises a cohesive set of sample locale-based reports, dashboards, integrations, and other items that can save time and effort during implementation and post-go-live activities. It has minimal tenant-specific information so you can easily adapt it to your specific needs.

Workday groups the content into logical collections called Configuration Packages. Example: The HCM Condition Rules Configuration Package includes common HCM condition rules and calculated fields that you can use immediately in business processes or modify to meet your requirements.

Thoroughly test the Configuration Catalog content before migration. Before you migrate content to your Production tenant, it's your responsibility to confirm that all configurations and reports meet their regulatory and business requirements.

To browse the Configuration Catalog, access the View Configuration Catalog Content task in your Customer Central tenant. You can filter packages by SKU or country and view their prerequisites, if they have any.

Related Information

Concepts

Introducing Workday Packaged Solutions

Tasks

Migrate Configuration Catalog Content with Object Transporter on page 799

Reference

Reference: Best Practices for Migrating Integrations with Object Transporter on page 807

Set Up Customer Central Accounts

Steps: Set Up Customer Central Accounts

Context

Customer Central is a separate Workday tenant designed to simplify and centralize the deployment process. A Customer Central tenant includes a preconfigured account called wd-tenantowner. The wd-tenantowner account configures the 2 required accounts, while the Customer Central Administrator configures Customer Central User accounts:

Customer Central Account	Created By:
Customer Central Security Administrator (required)	wd_tenantowner Workday requires only 1 account but recommends that you also create a backup account.
Customer Central Administrator (required)	wd_tenantowner Workday requires only 1 account but recommends that you also create a backup account.
Customer Central Users	Customer Central Administrator If you have a Customer Central account, you don't need a Customer Central User account.

Steps

1. Create Customer Central Security Administrator Accounts on page 764.

   Use this account to handle tasks such as password resetting and security settings maintenance. You also need this account to restrict who can migrate Security Configuration Packages with Object Transporter.

   The set of features that you manage through this account is unique to those features you manage with any other account. As such, the user name that you use for this account must be unique to the account user name that you use in Customer Central or other tenants.

   Consider creating a second Security Administrator account as backup when the primary Customer Central Security Administrator is unavailable.
2. Create Customer Central Administrator Accounts on page 765.

   Use this account to create and manage Customer Central User accounts and other Customer Central Administrator accounts. To enable migration with Object Transporter, account user name must be identical across source, Customer Central, and target tenants.

   Consider creating a second Administrator account as backup when the primary Customer Central Administrator is unavailable.
3. (Optional) Sign in to Customer Central as wd-tenantowner and access the Maintain Customer Central VCR Managers task.

   Select 1 or more accounts to add to the Customer Central VCR Restriction Manager group.

   VCR Managers control which accounts must sign into Workday's VCR environment before getting access to a tenant. Workday recommends that every deployment designates at least 1 VCR manager before the Tenant Owner account expires.
4. Create Customer Central User Accounts on page 766.

   Create Customer Central user accounts for implementers or customers. To enable migration with Object Transporter, account user name must be identical across source, Customer Central, and target tenants. If you've already created a Customer Central Administrator account for yourself, you don't need this account.
5. (Optional) Sign in to Customer Central as Security Administrator and access the Convert Customer Central User Account task.

   Select the account type that you want to convert and then the specific user.

   You can convert account types from implementer to customer and the other way around. When converting account types, the change in permissions and account roles applies only in the Customer Central Tenant and not in other tenants.
6. (Optional) Disable Tenant Owner Account on page 767.

   Disable the wd-tenant role when you no longer need it. The wd-tenantowner account automatically deactivates 60 days after Workday provides its credentials to the customer. Create the other required accounts before that happens.

Related Information

Concepts

Concept: Customer Central on page 762

Concept: Customer Central Users on page 768

Concept: Customer Central Security Model on page 770

Concept: Customer Central Account Naming Conventions on page 771

Create Customer Central Security Administrator Accounts

Context

Customer Central requires a Security Administrator account to manage security settings. A Customer Central Security Administrator account has access to a unique set of features, unrelated to those of a Customer Central Administrator or a Customer Central User account. Example: You can use the Customer Central Security Administrator account to control which users can migrate Security Configuration Packages. The Account doesn't have data migration or configuration permissions.

Steps

1. Sign in to Customer Central as wd-tenantowner. Use the password Workday provided.

   Note: If you've already created your first Customer Central Security Administrator, sign in with that account.
2. Access the Create Security Administrator task. As you complete the task, consider:

Option	Description
Is this user a Workday certified implementer?	Leave this check box clear. Without this implementer account type, Customer Central Security Administrators can't initiate these tasks from Customer Central but can do so from other tenants: • Create Configuration Package • Create Security Configuration Package
User Name	Follow the Customer Central account naming convention: `first.last-sec-admin` The name you use for this account must be unique from any other tenant account names. Customer Central Security Administrators must securely access a unique set of features unrelated to those of Customer Central Administrators or Users.

Next Steps

Create at least 1 backup Customer Central Security Administrator account.

Related Information

Concepts

Concept: Customer Central Users on page 768

Concept: Customer Central Account Naming Conventions on page 771

Create Customer Central Administrator Accounts

Context

Customer Central requires an administrator account to manage user accounts. If you create a Customer Central Administrator account to manage users, you don't have to create a Customer Central user account for yourself.

Steps

1. Sign in to Customer Central as wd-tenantowner. Use the password Workday provided.

   Note: If you've already created your first Customer Central administrator, sign in with that account.

2. Access the Create Customer Central Administrator task. As you complete the task, consider:

Option	Description
Is this user a Workday certified implementer?	If the user is a Workday certified implementer, select this check box. Otherwise, leave this check box clear. Without this implementer account type, Customer Central administrators can't initiate these tasks from Customer Central but can do so from other tenants: • Create Configuration Package • Create Security Configuration Package
User Name	Match this user name to the individual's account ID in other tenants. To use Configuration Catalog or Object Transporter, Customer Central requires that an individual have the same account ID across tenants.

Next Steps

Create at least 1 backup Customer Central administrator account.

Related Information
Concepts

Concept: Customer Central Users on page 768

Concept: Customer Central Account Naming Conventions on page 771

Create Customer Central User Accounts

Context

You can create an unlimited number of Customer Central user accounts for implementers and customers. Any Customer Central user can migrate Configuration Packages from the Configuration Catalog and use Object Transporter. If you've already created a Customer Central administrator account for yourself, you don't need a Customer Central user account.

Steps

1. Sign in to Customer Central as a Customer Central administrator.
2. Access the Create Customer Central User task and provide basic user details. As you complete the task, consider:

Option	Description
Is this user a Workday certified implementer?	If the user is a Workday certified implementer, select this check box. Otherwise, leave this check box clear. Without this implementer account type, Customer Central users can't initiate these tasks from Customer Central but can do so from other tenants: • Create Configuration Package • Create Security Configuration Package

Option	Description
User Name	Match this user name to the individual's account ID in other tenants. To use Configuration Catalog or Object Transporter, Customer Central requires that an individual have the same account ID across tenants.

Related Information
Concepts
Concept: Customer Central Users on page 768
Concept: Customer Central Account Naming Conventions on page 771

Disable Tenant Owner Account

Prerequisites

Create at least 2 Customer Central Security Administrator accounts and at least 2 Customer Central Administrator accounts.

Context

Customer Central has 1 preconfigured tenant owner account, wd-tenantowner, which creates the other required accounts. It automatically deactivates after 60 days but you can disable it at any time, provided you've created Security Administrator and Central Administrator accounts.

Steps

1. Sign in to Customer Central as a Customer Central Security Administrator.
2. Access the Disable Customer Central Tenant Owner task.
3. Select the Are you sure you want to disable the Tenant Owner? check box.

Related Information
Tasks
Create Customer Central Security Administrator Accounts on page 764
Create Customer Central Administrator Accounts on page 765

Steps: Enable OpenID Connect Authentication with SAML SSO in Customer Central

Prerequisites

Steps: Set Up Customer Central Accounts on page 763.

Context

Customer Central Security Administrators can sign in to Customer Central and enable OpenID Connect Authentication (OIDC) for themselves and other users. You can set up SAML Single Sign-On (SSO) authentication the same way in Customer Central as you do in your target tenants.

Steps

1. Sign in to Customer Central as a Customer Central Security Administrator.
2. Enable OpenID Connect Authentication.

   Google customers can skip the optional step to complete the Max OpenID Connect Session Age field. As an OIDC provider, Google doesn't support this feature.

3. Access the Manage Authentication Policies report to add OIDC authentication in Customer Central.

   See Steps: Set Up Authentication Policies.

   Complete these selections in the authentication policy that you add:

   - From the Restricted to Environment prompt, select *Implementation* or *Sandbox*.
   - Define the Default Rule for All Users.
   - On the Specific prompt, select *SAML*.
   - Select Activate All Authentication Policies.
4. Access the Edit Customer Central Account for User task to add an OpenID identifier for the Customer Central Security Administrator and other Customer Central Administrators or Users.

   The OpenID identifier is typically the user's Gmail ID. Once you've enabled OpenID Authentication in Customer Central, you must configure the Security Administrator's OpenID identifier to sign in to Customer Central again.

   Workday recommends that you assign a password to any new Customer Central user because authentication methods might change.

Result

After you enable your account with OIDC, you can sign in to Customer Central using your Google credentials.

Related Information

Concepts

Concept: OpenID Connect

Concept: SAML Authentication

Concept: Single Sign-On (SSO)

Concept: Customer Central Users

When a Named Support Contact requests a Customer Central tenant, Workday creates it during the specified maintenance window and provides wd-tenantowner credentials. Workday sends these credentials to the requestor and any other named NSCs or tenant managers. You must use the wd-tenantowner account to create 2 other required accounts:

- Customer Central Security Administrator
- Customer Central Administrator

Once created, the Customer Central Administrator account can create Customer Central User accounts. Customer Central Administrators don't have to create a Customer Central User account for themselves.

If you have any issues, use the Customer Care link for your Customer Central Tenant in the Tenant Management section of your Customer Center.

Customer Central Security Model

- Customer Central has a unique security model in which Workday automatically sets specific roles and permissions that you can't change. This model means that a single account can’t have multiple roles.
- A Customer Central Administrator account includes all the permissions of a User account. Customer Central Administrators don't need to create Customer Central User accounts for themselves.
- A Security Administrator account has access to a separate set of features that focus on security. The features are unrelated to the set belonging to the Central Administrator or User. You can designate a Security Administrator account as a Workday certified implementer to restrict it to the Workday Virtual Clean Room (VCR). However, doing so doesn't give the account access to additional implementer-only features, as it does with Central Administrator.

Customer Central Roles

<table>
<tr><th>Role</th><th>Details</th><th>Useful Tasks and Reports</th></tr>
<tr><td>Tenant Owner (wd-tenantowner)</td><td>Suitable for:
Named Support Contact
Engagement Manager
Created automatically by Workday.
Creates Customer Central Security Administrator and Customer Central Administrator accounts. Workday recommends creating at least 2 of each.</td><td>Create Security Administrator
Maintain Security Administrators
Create Central Administrator
Maintain Central Administrators</td></tr>
<tr><td>Customer Central Security Administrator</td><td>Suitable for:
Named Support Contact
Engagement Manager
Identical to the Security Administrator role in a regular Workday tenant.
Edits Workday and Customer Central account information.
Sets password rules and resets forgotten passwords.
Maintains feature opt-ins.
Manages authentication policies.
Creates additional Customer Central Security Administrators.
Select which users can migrate:
Configuration Packages.
Security Configuration Packages.</td><td>Create Security Administrator
Maintain Security Administrators
Edit Customer Central Account For User
Maintain Password Rules
Manage Password Challenge Questions (Do Not Use)
Maintain Access to Customer Central Tooling
Maintain Feature Opt-Ins
Maintain Tenant Challenge Questions (Do Not Use)
Maintain User Name Rules
All Workday Accounts
Signons and Attempted Signons
Configuration Change Tracker</td></tr>
</table>

Role	Details	Useful Tasks and Reports

Customer Central Administrator	• Suitable for:
	    ◦ Named Support Contact
	    ◦ Engagement Manager
	    ◦ Functional Lead
	    ◦ Data Conversion Lead
	    ◦ Data Conversion team member
	• Creates Customer Central User accounts.
	• Creates additional Customer Central Administrator accounts.
	• Edits Workday and Customer Central account information.
	• Manages tenant access for users.
	• Performs migration with Object Transporter.
		• Create Central Administrator
		• Maintain Central Administrators
		• Create Customer Central User
		• Maintain Customer Central Users
		• Edit Customer Central Account For User
		• Manage Password Challenge Questions (Do Not Use)
		• Manage Tenant Access
		• Maintain Customer Tenants
		• Configuration Catalog
		• Object Transporter Migration Reports
		• Migrate Configuration Package
		• Configuration Change Tracker

Customer Central User	• Suitable for:
	    ◦ Customer
	    ◦ Implementer
	• Accesses user features.
	• Performs data migration and load activities (implementer only).
	• Performs migration with Object Transporter.
		• Configuration Catalog
		• Object Transporter Migration Reports (OX).
		• Migrate Configuration Package
		• Configuration Change Tracker

Concept: Customer Central Security Model

Customer Central has a unique security model in which specific roles and permissions are set automatically and can't be changed. This model means that a single account can’t have multiple roles.

Customer Central has 4 security roles:

- Tenant Owner (wd-tenantowner)
- Customer Central Security Administrator
- Customer Central Administrator
- Customer Central User

Workday recommends this sequence for creating required accounts in a Customer Central tenant:

1. The Tenant Owner account, which Workday preconfigures, creates the first Security Administrator and Central Administrator accounts.
2. The Security Administrator and Central Administrator accounts create at least 1 backup Security Administrator and 1 backup Central Administrator.
3. A Central Administrator creates Central User accounts.

A Central Administrator account includes all the permissions of a User account.

You can designate a Central Administrator account as an implementer to give it access to additional implementer-only features.

A Security Administrator account has access to an entirely separate set of features that focus on security and are unrelated to those of Central Administrator or User.

This separation of roles means it's common for a Named Support Contact or Engagement Manager to have both a Central Administrator Account and a Security Administrator Account.

In addition, the Tenant Owner should designate a Virtual Clean Room (VCR) Manager. VCR Managers control which accounts must sign into VCR before getting access to a tenant.

VCRs are only available to deployments primed by Workday Professional Services. Nevertheless, Workday recommends that every deployment designates at least 1 VCR Manager before the Tenant Owner account expires.

Related Information
Concepts
Concept: Customer Central on page 762

Concept: Customer Central Account Naming Conventions

Workday assumes that accounts with the same name belong to the same individual. When a user signs in to Customer Central, Customer Central attempts to authenticate to other tenants as the currently signed-in user.

This table suggests naming conventions for Customer Central account names. Disregard the convention if it doesn't meet the naming criteria.

Role	Suggested Naming Convention and Criteria
Security Administrator	`first.last-sec-admin` Example: logan.mcneil-sec-admin An individual's Customer Central Security Administrator account name must be unique.
Central Administrator	`first.last` Example: logan.mcneil An individual's Customer Central Administrator account name must match their account name in other tenants.
User	`first.last` Example: logan.mcneil An individual's Customer Central User account name must match their account name in other tenants.
Security Administrator (Implementer)	`firstInitialLast-impl-sec-admin` Example: lmcneil-impl-sec-admin An implementer's Security Administrator account name must be unique.
Central Administrator (Implementer)	`firstInitialLast-impl` Example: lmcneil-impl

Role	Suggested Naming Convention and Criteria
	An implementer's Central Administrator account name must match their account name in other tenants.
User (Implementer)	`firstInitialLast-impl` Example: lmcneil-impl An implementer's User account name must match their account name in other tenants.

Related Information

Concepts

Concept: Customer Central Users on page 768

Tasks

Steps: Set Up Customer Central Accounts on page 763

Concept: Tenant Health Dashboard

The Tenant Health dashboard displays information relating to user access to Customer Central and multifactor authentication for implementation and sandbox tenants.

The Multi-Factor Authentication Configuration view shows how Multi-Factor Authentication is configured in Customer Central. The Customer Central Security Administrator is responsible for configuring MFA for the Customer Central tenant.

The My Tenant Access view displays how the current user's account is set up in Customer Central and associated tenants.

The All Customer Central Accounts view displays similar information for other Customer Central users.

The information displayed in the My Tenant Access and All Customer Central Accounts views includes:

Field	Description
Available Tenants	Lists implementation and sandbox tenants in the customer’s environment.
Access Granted	Indicates whether a user has been granted access to a tenant through the Manage Tenant Access task in Customer Central.
User Exists on Target Tenant	Indicates whether an account with this Customer Central username exists on another tenant.

A user can self-diagnose whether they have an incorrect account configuration for their account in Customer Central or any other of the implementation and sandbox tenants. The user can then notify the Customer Central Admin for contact information and tenant access corrections or the Security Admin for user names and password corrections.

Related Information

Concepts

Concept: Customer Central on page 762
Concept: Object Transporter on page 776

Set Up Customer Central Tenant Access

Steps: Set Up Customer Central Tenant Access

Prerequisites

Set Up Customer Central Accounts.

Context

Customer Central can only access tenants that you make available to it.

Steps

1. Sign in to Customer Central as a Customer Central Security Administrator.
2. Access the Enable Foundry Tenant Configuration Migration task.

   Select the wdsetup check box.

   The Workday foundry tenant, wdsetup, contains a number of sample configurations that you can access using Configuration Catalog. Implementer accounts automatically have access to Configuration Catalog but you must enable customer account access.

   The sample configurations in wdsetup aren't designed to meet individual customer's needs. They merely provide a starting point for configuration and aren't part of the Workday Service. Acknowledge the disclaimer to that effect.
3. Sign in to the tenant that you want to make available to Customer Central and access the Edit Tenant Setup – System task.

   In the Customer Central section, select the Enable Customer Central Access check box.

   Selecting the check box doesn't add the tenant to Customer Central. It just makes adding it possible.

   Customer Central can only access a tenant if you specifically make it available.

   Security: *Set Up: Tenant Setup - System* domain in the System functional area.
4. Add Target Tenants to Customer Central on page 773.

   Customer Central can't communicate with target tenants until you add them to its list of Current Tenants.
5. Provide Tenant Access to Customer Central Users on page 774.

   Manage Customer Central user access to specific implementation tenants.

Related Information

Concepts

Concept: Customer Central on page 762

Tasks

Steps: Set Up Customer Central Accounts on page 763

Add Target Tenants to Customer Central

Context

You can enable Customer Central access in target tenants. But Customer Central can't communicate with them until you add them to its list of Current Tenants.

Steps

1. Sign in to Customer Central as a Customer Central Administrator.
2. Access the Maintain Customer Tenants task.

3. Click Add Tenant to Customer Central.

   Workday displays available tenants in the Tenants Available to Add section. If you don’t see the tenant that you want, the Customer Central Security Administrator might not have enabled it for Customer Central.

   See Steps: Set Up Customer Central Tenant Access on page 773.
4. Select the check box for each tenant that you want to add.
5. Provide a meaningful Central Description.

   Workday displays tenants that you’ve added to Customer Central under the Current Tenants heading.

Related Information

Concepts

Concept: Customer Central on page 762

Tasks

Steps: Set Up Customer Central Accounts on page 763

Provide Tenant Access to Customer Central Users

Prerequisites

- A Customer Central Administrator Account to add Customer Central Users.
- Customer Central Users must have a valid, corresponding, active account in each of the tenants you're granting access to.
- Customer Central Users who need to migrate with Object Transporter must already be part of the Migration Administrator security group in both source and target tenants.

  See Configure Object Transporter Security Permissions on page 784.

Context

After you add tenants to Customer Central, you can provide individual users with access to the added tenants. To migrate using Object Transporter, users you add must already be part of the Migration Administrator security group in both source and target tenants.

Steps

1. Sign in to Customer Central as a Customer Central Administrator.
2. Access the Manage Tenant Access task.

   Workday displays the tenants that you added to Customer Central along with the descriptions you provided for them.

   Note: If you enrolled a tenant but it doesn't display here, log a case to ensure that the EMS tags for the target tenent are correct. Use the case type Production Support Request > Integration Tools > Customer Central.
3. At the Users prompt for each tenant, enter the names of the users who need access. You don't need to add Customer Central administrators. They have access to all tenants.

   Match this user name to the individual's account ID in other tenants. To use Configuration Catalog or Object Transporter, Customer Central requires that an individual have the same account ID across tenants.

Related Information

Concepts

Concept: Customer Central on page 762

Tasks

Steps: Set Up Customer Central Accounts on page 763

Set Up Customer Central Production Access
Set Up Customer Central Production Access

Prerequisites

Enable Customer Central access in the target Production tenant.

Context

Providing Customer Central with access to a Production tenant requires you to perform actions in both tenants in a specific order, swapping back and forth between them.

Steps

1. Sign in to Customer Central as a Customer Central Administrator.
2. In a different browser tab, sign in to your target Production tenant as a Security Administrator.
3. In Customer Central, access the Maintain Customer Tenants task.
4. Click Add Tenant to Customer Central.

   Workday displays tenants in which you enabled Customer Central access under the Tenants Available to Add heading.
5. Select the check box beside the tenant you want to add.

   Workday displays the Production tenant in the Current Tenants section with this Tenant Load Status: Requires set up via Manage Tenant Connection.
6. Provide a meaningful Central Description.
7. From the related actions menu on the Production tenant name, select Manage Connection and click Begin Setup.
8. Copy the Production tenant's URL from your browser's address bar and paste it into the Tenant URL field.

   Workday prompts you for an Access Key, which you obtain from the Production tenant.
9. In the Production tenant, access the Manage Customer Central Access task and click Begin Setup.
10. Copy the Customer Central tenant's URL from your browser's address bar and paste it into the Customer Central URL field.

    Workday provides an Access Key.
11. Copy the Access Key and in Customer Central, paste it into the Access Key field.

    Workday confirms connection to the Production tenant.

Result

Customer Central now has access to the Production tenant. You can revoke access at any time by accessing the Manage Customer Central Access task.

Next Steps

Use the Manage Tenant Access task to provide users with Customer Central access to the Production tenant.

Related Information

Tasks

Steps: Set Up Customer Central Tenant Access on page 773

Reference

Workday Community: Troubleshoot Production Tenant Connection Issues

Create Customer Central Sessions

Prerequisites

Set up Customer Central Production access.

Context

To load or migrate objects to a Production tenant, users must create a Production tenant session. The session authenticates the objects by linking the Customer Central user account with their Production tenant account.

A Production tenant session remains active for 30 days, after which you must set up a new session. A tenant session also ends anytime that the associated Production tenant account is locked, revoked, or disabled.

Steps

1. Sign in to Customer Central as the user who intends to perform loading or migration to the target Production tenant.

   You must also have a valid user account in the Production tenant with the required security permissions to perform loading or migration.
2. Access the My Tenant Session task.
3. From the Tenant drop-down list, select the Production tenant.
4. Click Open Session.

   Workday redirects you to the Production tenant.
5. Sign in to the Production tenant as a user with the security permissions required to perform loading or migration.
6. To authorize Customer Central access your Production account, click Allow.

   Workday redirects you to Customer Central.

Result

You can now load and migrate objects to the Production tenant using tools such as Advanced Load (certified implementers only) and Object Transporter. You can close the tenant session manually at any time by accessing the My Tenant Session task.

Related Information
Tasks
Set Up Customer Central Production Access on page 775

Object Transporter
Concept: Object Transporter

Object Transporter (OX) is a deployment tool that enables you to automate the migration of configuration data from 1 tenant to another. Migrating objects with Object Transporter ensures accuracy and saves time you'd otherwise spend manually reconfiguring objects in the tenants in which you need them. Object Transporter also provides auditing and reporting functionality that isn't possible with manual configuration. It migrates both top-level objects and any dependencies of top-level objects.

The Object Transporter Supported Objects (OX) report details which objects and any related dependencies you can migrate. The report is available in Customer Central and non-Production tenants with access to Customer Central.

To help you prepare for migration, you can also view the Configuration Change Tracker report to track changes to configuration data in tenants.

Object Transporter Migration Use Cases

Object Transporter supports these use cases:

- Single instances of configuration data (single instances).
- Bundled packages of configuration data (configuration packages).
- Bundled packages of security configuration data (security configuration packages).
- Configuration Catalog content.
- Instances of objects containing translated values.
- X.509 private key pairs.
- Configuration extract (.dat) files.
- Advanced configuration packages created from Configuration Change Tracker reports.

When to Use Object Transporter

Use the Configuration Extracts tool only when:

- You want to reuse the same configuration multiple times across different environments.
- Your source and target tenants have different Billing IDs.
- You need a copy of a configuration for reloading to your tenant at a later time.
- In all other cases, you can use Object Transporter.

Automated Dependency Management

Object Transporter migrates configuration data for an object and includes any dependent objects that instances of top-level objects use. To ensure a smoother and more successful migration process, Object Transporter provides a pre-check validation to help you identify and correct potential errors before migration. If Object Transporter finds missing prerequisites on the target tenant, it displays a Pre-Migration Check page that lists the instances with missing prerequisites for you to resolve. To resolve a prerequisite, sign in to the target tenant and create the missing instance or resolve its Reference ID. You can also map source instances that have no corresponding target instances to other compatible instances on the target tenant, without leaving the migration workflow.

Object Transporter reports missing prerequisites for top-level objects and for any their dependencies. While Object Transporter migrates configuration data for an object and its dependent objects, it doesn't migrate transactional or reference data. Example: A custom report definition references a calculated field that in turn references a location. When you migrate the report, you also automatically migrate the calculated field, but not the location. In this example, the Pre-Migration Check report flags the location as a missing prerequisite.

Source and Target Tenant Differences

Just before migration, Object Transporter displays the differences between your source and target tenants for the instances that you select to migrate. You can also view the differences for the dependencies of these instances.

When viewing dependencies, always click View Attribute Diff to examine the individual attributes that make up each dependent object.

Workday provides a status icon for each instance, dependency, or attribute: Change, Removal, or New. Reviewing the differences enables you to make informed decisions about whether to proceed with the migration.

Configuration Extracts for Migration or Tenant Refreshes

When you need to reuse a configuration package across different tenants, or save a configuration before a tenant refresh, use the Configuration Extracts tool. Configuration Extracts enables you to create extract files from configuration or security configuration packages and then migrate or reload the extracts to refreshed or target tenants.

Note: You can't load configuration extracts to Production tenants. To move configuration data to Production tenants, you can import the data to an Implementation or Sandbox tenant and then use Object Transporter to migrate the data to the Production tenant.

To view a history of generated extract files, navigate to Customer Central and access the Extraction report in the Report section of the Object Transporter (OX) dashboard.

Access to Object Transporter

You can start migration with Object Transporter in the Customer Central tenant or from your source tenant. In the latter case, Workday redirects you to Customer Central to complete the migration.

To use Object Transporter, set up access to it. See Steps: Configure Access to Customer Central and Object Transporter on page 782.

Migrating Configuration Changes

You can use Configuration Change Tracker to migrate configuration changes by specific users and timeframes. Migrating with Configuration Change Tracker is an easy and safe way to synchronize configurations between tenants. Because Object Transporter only migrates the instances that you select from a Configuration Change Tracker report and migrates no additional dependent instances after migration starts, it synchronizes only the configurations data that you know about.

To migrate from Configuration Change Tracker, a Customer Central security administrator must grant you access on the Maintain Access to Customer Central Tooling task by selecting the OX Migration: Full Object Coverage check box.

Enabling and Restricting Migration

Customer Central security administrators can restrict individual users from migrating packages and extracts:

Enable or Restrict	Task to Use
Configuration package migration.	Maintain Access to Customer Central Tooling (Single instance migration still available) This task replaces the Restrict User Access to Migrate with Object Transporter task.
Security configuration package migration.	Maintain Access to Customer Central Tooling This task replaces the Maintain Access to Migrate Security Configuration Packages task.
Configuration extracts creation and migration.	Maintain Access to Customer Central Tooling This task replaces the Maintain Access to Migrate Configuration Extracts task.
Tenant Compare report creation and modification.	Maintain Access to Customer Central Tooling This task replaces the Maintain Access to Tenant Compare task.
Migration of Advanced configuration packages from Configuration Change Tracker reports.	Maintain Access to Customer Central Tooling
Migrations to only the instances to which migrators have access, limiting them to: • Single instance migrations.	Maintain Access to Customer Central Tooling

Enable or Restrict	Task to Use
• Advanced configuration migrations from their own Configuration Change Tracker reports.	

Supported Tenant Types

Object Transporter supports migrations between these tenant types:

Source Tenant	Target Tenant
Implementation	• Implementation • Sandbox • Preview
Sandbox	• Implementation • Production • Preview
Preview If the content relies on functionality that Workday hasn't yet delivered to Production tenants, wait until Workday completes the delivery cycle to Production before you migrate. Example: Workday delivers a new report to Preview tenants, from which you create a customized report. Workday plans to deliver the new report to Production tenants in 2 weeks. Wait until Workday delivers the new report to Production tenants before migrating the customized report to your Production tenant..	• Implementation • Sandbox
Wdsetup (Configuration Catalog only)	• Implementation • Sandbox
Workday App Development tenant Note: When you migrate a configuration extract, Workday provides an option to select a Development tenant as a target tenant. If you're migrating extracted content from an Implementation to a Development tenant, Workday doesn't support this path. These migrations result in an error message.	Implementation

Related Information

Concepts

Concept: Customer Central on page 762

Concept: Configuration Change Tracker on page 811

Tasks

Steps: Create Configuration Extracts on page 821

Reference

Reference: Best Practices for Migrating Integrations with Object Transporter on page 807

Concept: Object Transporter Migration Workflow

Workday launches Object Transporter when you access these tasks or associated related actions to migrate configuration data between tenants:

- Migrate with Object Transporter .
- Migrate Configuration Extract .

Before Object Transporter moves configuration data to a target tenant, Workday checks for issues in the source data. It first finds errors that block migration, then identifies prerequisite issues you must resolve. The final check displays changes to the target tenant after migration, enabling you to examine and exclude modified instances or dependencies before migrating to your target tenant. The sequence follows this workflow:

1. Error check

   If Workday finds errors blocking your migration, it displays the View Errors page in the migration workflow. The page includes guidelines for fixing the errors and retrying the migration.

2. Prerequisites check

   Workday checks for instances that have configuration prerequisites that must exist in the target tenant for migration to succeed. If found, it lists the missing migration prerequisites on the Pre-Check Migration page, with guidelines for resolving them. Workday flags a prerequisite as an issue when it finds:

   - No corresponding instances on the target tenant.
   - A missing or mismatched Reference ID.

3. Premigration differences check

   Workday next displays a Pre-Migration Diff Report page to report the instances, grouped by implementation type, that you have in scope for migration.

   The information in the header summarizes the contents of the instance, configuration package, or configuration extract that you have in scope for migration. It displays the number of implementation types present and the number of unique instances planned for migration. Workday counts the instances it finds across multiple implementation types only once. The report groups instances with the same migration behavior by these tabs, enabling you to focus on one migration behavior at a time:

Tab	Description
All Instances	Lists all instances that your configuration package, or configuration extract contains. When you migrate a single instance, the tab displays 1 top level instance and any

Tab	Description
	dependent objects it may contain.
Modified Status icon: Orange	Lists instances that exist in both the source and target tenants but differ because of a previous modification. During migration, Workday overwrites the target instance with the source instance unless it is a security policy. By default, Workday merges security policies from a source with the corresponding security policy on the target tenant. You can change default behavior for security policy migration by using the Edit Migration Behavior option to overwrite the tenant security policy.
New Status icon: Blue	Lists instances that don't yet exist exist in the target tenant. During migration, Workday adds the instance from the source tenant to the target tenant.
No Change Status icon: Gray	Lists instances that are identical in the source and target tenants. No migration is necessary.
Excluded	Lists top-level instances that you've excluded from the migration. If you haven't excluded anything, Workday doesn't display this tab.

You can use the report to review instances in detail by drilling down with these reports:

	• Dependencies Diff: When the Pre-Migration Diff Report reports a new or modified top-level instance, you can click View Dependencies to view the dependent instances of top-level instance that Workday will also migrate. • View Attribute Diff: When the Dependencies Diff report displays modified dependencies of an instance, you can click the View Attribute Diff button for the instance to compare the attributes differences between source and target tenants. • Manage Modified Instances: When the Dependencies Diff report displays modified dependencies of an instance, you can click the Manage Modified Instances button in the report header select any modified instances to exclude from migration.
4. Migration	When you resolve all issues, review the difference reports, and optionally exclude any modified instances and dependencies from migration, Object Transporters migrates the instances from the source tenant, less any modified instances that you select to exlude. It always migrates the current version of tenanted objects. Adding an instance of an object to a configuration package doesn't restrict Workday from updating that object to a newer version of the one in the package when one is available.

When Workday completes the migration, you can view the Post Migration report, or create a Tenant Compare report to compare the differences between tenants after migration.

Related Information

Tasks

Migrate Single Instances with Object Transporter on page 793

Migrate Packages with Object Transporter on page 788

Migrate Configuration Catalog Content with Object Transporter on page 799

Migrate Configuration Extracts on page 822

Steps: Migrate Translated Objects on page 806

Steps: Configure Access to Customer Central and Object Transporter

Prerequisites

Obtain a Customer Central tenant. Workday customers from before January 2018 need to request a Customer Central tenant. See Tenant Management Requests on Workday Community.

Context

Before you can use Object Transporter to move configuration data from one tenant to another, you must configure Customer Central to access the tenants involved. You also must set up active roles for Customer Central users and administrators, and grant these accounts security permissions to Object Transporter.

Steps

1. Create Customer Central accounts.

   See Steps: Set Up Customer Central Accounts .
2. Enable Customer Central to access other tenants.

   See Steps: Set Up Customer Central Tenant Access.
3. (Optional) To perform migrations to your Production tenant using Object Transporter:

   - Enable Customer Central access to Production.
   - Create a Customer Central session for authentication.

   See Set Up Customer Central Production Access and Create Customer Central Sessions.
4. Confiure Object Transporter Security Permissions.

Related Information

Concepts

Setup Considerations: Customer Central on page 759

Concept: Customer Central on page 762

Steps: Migrate Packages with Object Transporter

Prerequisites

- Configure access to Object Transporter.

  See Steps: Configure Access to Customer Central and Object Transporter on page 782.
- Control Who Migrates Security Configuration Packages with Object Transporter

Context

Object Transporter can migrate up to 300 instances and their dependencies collected together in a single entity called a configuration package. The Object Transporter Supported Objects (OX) report details which objects you can migrate.

You create a configuration package by selecting implementation types and specific instances of those types. You migrate a package by selecting the tenant where it was created and the tenant you want to move it to. Workday enables you to view exactly what changes a migration will cause in the target tenant before you proceed. If granted permission, you can also migrate security configuration packages containing domain or business process security policies associated with a specified functional area.

Before migrating reports, consider the downstream impact to edited reports in lower level tenants so that you don't migrate potential issues. Workday recommends that you validate reports after migrating them and consider the downstream impact to alerts and other processes.

Steps

1. Create a configuration package or a security configuration package.

   See Create Configuration Packages for Object Transporter on page 785 or Create Security Configuration Packages with Object Transporter on page 787.

2. Access the Migrate with Object Transporter task in 1 of these ways:
    - To start migration from a source tenant, select Instance > Migrate with Object Transporter.

      Alternatively, you can view the package you want to migrate and select Migrate.

      When you're in the source tenant, Workday redirects you to the Customer Central to complete the migration.
    - To start migration from the Customer Central tenant, access the Object Transporter (OX) worklet and click Migrate with Object Transporter.

   See Migrate Packages with Object Transporter on page 788 and Migrate Single Instances with Object Transporter on page 793.

Related Information
Concepts
Setup Considerations: Customer Central on page 759
Tasks
Migrate Single Instances with Object Transporter on page 793
Migrate Configuration Catalog Content with Object Transporter on page 799
Manage Access to Customer Central Implementation Tools on page 750
Reference
Reference: Best Practices for Migrating Integrations with Object Transporter on page 807

Configure Object Transporter Security Permissions

Prerequisites

Security: *Security Configuration* domain in the System functional area.

Context

Create a user-based security group called Migration Administrator to provide security permissions to Customer Central Users who want to use Object Transporter.

Note: Perform these steps in every source and target tenant that you want to use with Object Transporter.

Steps

1. Sign in to a source or target tenant.
2. Access the Create Security Group task and create a user-based security group called Migration Administrator.
3. Access the Maintain Permissions for Security Group task.
4. Give the Migration Administrator group these domain security permissions:

Domain Security Policy	Permissions to Add to Migration Administrator Group
Special OX Web Services	• View and Modify. • Get and Put.
OX for Non-implementers	• View and Modify. • Get and Put.

   Note: The status of the Special OX Web Services domain is 'Suspended - Inactive for current session. Requires session with service context of Object Transporter.' This behavior is normal. The domain becomes active when you migrate objects with Object Transporter (OX).

5. Add Customer Central Users who need to use Object Transporter to the Migration Administrator security group.
6. Access the Activate Pending Security Policy Changes task and activate your changes.

Related Information

Concepts

Concept: Customer Central Security Model on page 770

Create Configuration Packages for Object Transporter

Prerequisites

Security: These domains in the Implementation functional area:

- *OX for Non-Implementers*
- *Special OX Web Services*

Context

You create a configuration package by selecting implementation types and specific instances of those types. Object Transporter can migrate a configuration package containing up to 300 instances and their dependencies.

During migration, Workday prompts you to specify the effective dates for any instances that have effective dates. Any dependencies of an instance with an effective date also inherit this effective date. However, when an instance doesn't have an effective date but its dependencies do, those dependencies inherit the date of migration as their effective date during the migration process. You can change inherited effective dates after migration. Workday can't migrate instances with effective dates in the future.

Steps

1. Sign in to the source tenant where you want to create a configuration package.
2. Access the Create Configuration Package task.
3. Select 1 or more object types to migrate from the Implementation Type(s) to Migrate drop-down list.

   If you're migrating *Integration Systems*, see Reference: Best Practices for Migrating Integrations with Object Transporter on page 807.
4. As you complete this task, consider:

Option	Description
Add Implementation Type(s)	Click to add 1 or more additional object types to the package.
Add/Edit Instances	Click to change instances for an Implementation Type. You can filter Instances based on 1 or more condition rules. When you migrate a filtered configuration package, Object Transporter includes all instances that match the condition rules. It includes even those instances that you create after you create the rules.
Remove	Click to remove an Implementation Type from the configuration package.
Done	Click to save the configuration package for later migration.

5. (Optional) Click Migrate to migrate the configuration package.

Next Steps

Migrate Packages with Object Transporter on page 788.

Related Information

Tasks

Steps: Migrate Packages with Object Transporter on page 783

Reference

Reference: Best Practices for Migrating Integrations with Object Transporter on page 807

Add an Instance to a Configuration Package

Prerequisites

Security: These domains in the Implementation functional area:

- *OX for Non-Implementers*
- *Special OX Web Services*

Context

You can add an instance to an existing configuration package through a related action menu of the instance. You can also select an instance and then create the configuration package and add the instance to it. To add multiple instances to the same configuration package, use the related action menu to add 1 instance at a time.

Steps

1. Sign in to the tenant that contains the instance you want to add.
2. Display the instance that you want to add to a configuration package.
3. From the related action menu of the instance, select Instance > Add Instance to Confuration Package
4. If the configuration package that you want already exists, select it by type or alphabetically.

   Workday populates the instance and the implementation type for the instance.

   Note: When an instance has more than 1 implementation type, select the implementation type to add to the package.
5. If you need to create the configuration package, select Create Configuration Package.
   a) Enter a name for the package.
   b) (Optional) Enter an External Change Request ID.

      These IDs enable you to track requested and approved migrations. You can view External Change Request ID flags with all migration activity in the Object Transporter Migration Reports (OX) dashboard in Customer Central.
   c) Click OK to confirm package creation.
6. Click OK to confirm the added instance.

Next Steps

Access the View Configuration Package task for your package to verify the addition. You can also use this task to add and remove instances from the package before you migrate it:

- Click Edit Instances to add other instances that belong to the same implementation type as the instance you just added.
- Click Add Implementation Type(s) to add other implementation types and instances of those implementation types.
- Click Remove to remove an instance from the configuration package that you just created.

Related Information

Tasks

Configure Object Transporter Security Permissions on page 784

Create Security Configuration Packages with Object Transporter

Prerequisites

- Ensure you have permissions to migrate security configuration packages.

  See Manage Access to Customer Central Implementation Tools on page 750
- Security: *OX for Non-Implementers* and *Special OX Web Services* domains in the Implementation functional area.

Context

You create a security configuration package by selecting domain or business process security policies associated with a specified functional area. Object Transporter can migrate a security configuration package containing any number of security policies.

Before migration in the Object Transporter workflow, Workday detects any modifications between security policies in a package and the corresponding policies on the target tenant. You can specify whether to merge the modifications with target tenant policies, or overwrite the corresonding target tenant policies, either individually, or for all modifications.

Steps

1. Sign in to the source tenant where you want to create a security configuration package.
2. Access the Create Security Configuration Package task.
3. Select 1 or more functional areas from the Functional Areas by Workday Solution drop-down list.
4. Select the type of security policies that you want to migrate: *Domain, or Business Process*.

   Workday displays the domain or business process security policies associated with the selected functional areas.
5. As you complete this task, consider:

Option	Description
Remove Security Groups from Target Tenant	Select security groups that you want to remove from the security configuration package. Note: When you remove tenanted security groups, Workday removes them from the domain security policy in the target tenant after migration successfully completes. As a result, the security configuration in the target tenant might not enable you to access the tasks and reports you have access to in the source tenant.
Add Row	Add additional functional areas to the security configuration package, if required.
Remove Row	Exclude specific security policies from the security configuration package.

Next Steps

Migrate the security configuration package.

See Migrate Packages with Object Transporter on page 788.

Related Information

Tasks

Manage Access to Customer Central Implementation Tools on page 750

Migrate Packages with Object Transporter

Prerequisites

- Configure access and security for Customer Central and Object Transporter:
    - See Steps: Configure Access to Customer Central and Object Transporter.
- Create Configuration Packages for Object Transporter.

Context

You can start a migration from a source tenant or from Customer Central. The Object Transporter Supported Objects (OX) report details which objects you can migrate.

After you select source and target tenants and the package to migrate, Workday compares the instances in the package with the corresponding instances on the target tenant and launches a series of checks to report issues that require resolution before migration can succeed.

See Concept: Object Transporter Migration Workflow

When Workday completes the migration, you can view the Post Migration report, or create a Tenant Compare report to compare the differences between tenants after migration.

Steps

1. Access the Migrate with Object Transporter task in 1 of these ways:
    - From a source tenant, view the package that you want to migrate and select Migrate.

      Workday redirects you to the Customer Central to complete the migration.
    - From the Customer Central tenant, access the Object Transporter (OX) worklet and click Migrate with Object Transporter.
2. If you started the migration from a source tenant, select the Target Tenant .
3. If you started migration from Customer Central, select:
    - The Source Tenant that contains the package that you want to migrate.
    - The Target Tenant that you want to migrate the package to.
    - The single instance, configuration package, or security configuration package from the list of packages that are available for migration.
4. On the Pre-Migration Status page, click Refresh or wait for Workday to complete the premigration check of the configuration data in scope for migration.

   Some instances have prerequisites that must exist in the target tenant for migration to succeed. Example: A calculated field. When Workday:
    - Finds missing prerequisites, it generates a Pre-Migration Check report.
    - Finds no missing prerequisites, it skips the Pre-Migration Check report and generates a View Pre-Migration Diff report.

5. Resolve any missing migration prerequisites that the premigration check finds in the target tenant:
    a) Click View Pre-Migration Check Report.
    b) Follow the guidelines on the Object Transporter Pre-Migration Check page.

       In the Errors table, Workday lists source instances that are prerequisites for migration. Workday flags a prerequisite as missing when it has:

       - No corresponding instances on the target tenant.
       - A missing or mismatched Reference ID.
    c) To resolve a prerequisite, sign in to the target tenant and create the missing instance or resolve its Reference ID.

       Note: You need the Reference ID of a compatible instance to map to it.

       You can also use Tailored Loading to map source instances that have no corresponding target instances to other compatible instances on the target tenant.
6. Use Tailored Loading to map any unmatched source instances to compatible instances on the target tenant:
    a) In the Errors table, click Map Instance for the missing prerequisite to resolve.
    b) Enter the Reference ID of a compatible instance on the target tenant.
    c) Click Search.
    d) In the table of results, select the check box for the compatible instance. When the table lists multiple instances, select the one that is:

       - The same implementation type.
       - The most compatible with the source tenant instance.
    e) Click Apply Mapping.

       To view information on the compatible instance, click the link for it in the Mapping to column.

       To remove a mapping, click Remove and follow the workflow to apply a new mapping.
    f) Click Rescan Target.

       When you've resolved all the missing prerequisites in the Errors table, Workday displays the Diff Report page to continue the migration.
7. If your selected package contains instances with effective dates, click Set Effective Date Strategy.
    a) On the Set Date for Package prompt, first select a strategy for all instances in the migration.

       You can apply a default effective date of 01/01/1900 or manually select a date. If you're migrating a single instance, any dependencies of the instance inherit the date you select here.

       If an instance without an effective date has dependencies with effective dates, the dependencies inherit the date of migration as their effective date during the migration process.

       You can always change effective dates after migration. You can also further refine your effective date strategy by selecting different dates for instances and dependencies individually, or as a group, by implementation type.
    b) To apply different effective dates at the implementation type or instance level, click Save and Continue Editing.
    c) To select a different effective date for all instances of an implementation type, select a date in the Set Effective Date By Implementation Type column.

       To change the year, enter it directly in the field.
    d) To change the effective date of 1 or more unique instances or dependencies, click Set Effective Date by Instance.
    e) Select a new effective date for an instance in the Set Effective Date by Instance column.

       Workday displays both instances and their dependencies as separate rows in the table. To change the year for an instance or dependent instance, enter the year directly in the field.
8. (Optional) If your package contains domain or business process security policies that differ from the corresponding policies on the target tenant, click Edit Migration Behavior and select a migration

behavior for all or some of the modified security policies. Workday merges security policies by default unless you use this option to override security policies on the target tenant.

Note: Workday only enables this option when it detects 1 or more modified security policies.

Option	Description
Merge (Recommended)	Default behavior. Combines permission-holding components such as security groups and roles from all modified source security policies with those in the corresponding target security policies. Merges are additive. Workday removes nothing, making it the safest option. Consider this option when you need to: • Prioritize target tenant integrity. • Migrate routine updates from a preview, sandbox, or development environments to production, where the goal is to introduce new configurations without disturbing existing ones. • Mitigate the risk of inadvertently removing permissions or security groups that are critical for target tenant operation. • Protect target-specific changes. Because Merge is non destructive by default, it reduces time spent on checking for potential overwrites, enabling you to focus more on verifying the additions.
Override	Replaces all security policies on the target tenant with the corresponding modified ones on the source tenant. When replacing, Workday discards the previous corresponding policies on the target tenant and implements only the modified security policies from the source tenant. Consider this option when you need to: • Treat the source tenant as the authoritative source for security policies. • Perform initial deployments or tenant refreshes. • Intentionally replace target security policies fully. • Ensure absolute consistency with the source. Note: When you migrate a single instance, Workday replaces only the corresponding instance on the target tenant.
Manual Selection	Provides the most granular control, enabling you to review each modified security policy in the package individually. In the Migration

Option	Description
	Behavior per Instance column, select Merge or Override for each modified security policy. Consider this option when you need to: • Handle complex migrations with diverse policy-specific needs. • Address mixed requirements in a single package where different policies need different merge or override behavior applied to them. • Operate in sensitive environments that demand meticulous control over each policy. • Manage phased rollouts or policies handled by different teams. • Achieve maximum precision and flexibility, tailoring action to each policy.

9. Click Refresh or wait for Workday to display View Diff Report and click it.

   The Pre-Migration Diff Report page displays all instances in scope for migration, grouped by the implementation type of the top-level instance, and organized by migration behavior these tabs:

Tab	Description
All Instances	Lists all instances that your configuration package, or configuration extract contains. When you migrate a single instance, the tab displays 1 top level instance and any dependent objects it may contain.
Modified Status icon: Orange	Lists instances that exist in both the source and target tenants but differ because of a previous modification. During migration, Workday overwrites the target instance with the source instance unless it is a security policy. By default, Workday merges security policies from a source tenant with the corresponding security policy on the target tenant. You can change default behavior for security policy migration by using the Edit Migration Behavior option to overwrite the tenant security policy.
New Status icon: Blue	Lists instances that don't yet exist exist in the target tenant. During migration, Workday adds the instance from the source tenant to the target tenant.
No Change Status icon: Gray	Lists instances that are identical in the source and target tenants. No migration is necessary.
Excluded	Lists top-level instances that you've excluded from the migration.

Tab	Description
	If you haven't excluded anything, Workday doesn't display this tab.

You can select a tab to filter by migration behavior. On the tab, you can expand an implementation type to review the top-level instances in scope for migration. The same inplementation type can appear on multiple tabs, but the instances listed under it only relate to a particular migration behavior. Example: You select the Modified tab and see the same implementation type that you saw on the New tab. You expand the implementation type and see a unique set of of top-level instances from the instances on the New tab. The Modified tab lists instances with differences between the source and target instances. The New tab lists instances that don't yet exist on the target tenant.

The number beside the Modified status indicates the total number of top-level modified instances in scope for migrtation. The number beside the New status indicates the total number of top-level instances that Workday will add to the target tenant.

Note: Pre-Migration Diff reports for migrations that don't proceed remain available for 30 days

.

10.(Optional) Review the dependencies of the new or modified instance or instances:
   a) Navigate to the Modified or New tab and expand the implementation type.
   b) In the Dependencies column of the table, click View Dependencies for the instance with dependencies you want to review.

      Workday recommends that you examine the dependent objects in new or modified instances.

      Like top-level instances, Workday provides a status icon for each dependent instance: Modified, New, or No Change.

      Note: When Workday encounters a circular dependency, it stops loading any more dependencies for the instance. Workday migrates circular dependencies. To prevent repetitive reporting of the same dependency, it only displays the first occurrence of the dependency and flags it with a circular dependency icon.

11.(Optional) To view the attributes for a modified instance, click View Attribute Diff to examine the individual attributes in the modified dependency object.

   On the Attribute Diff page, Workday provides a status icon for each attribute of a Modified instance. The following table describes how Workday categorizes the differences between source and target attributes:

Attribute Status	Description
Change	Source and target attributes exist but aren’t identical. Migration overwrites the target attribute with the source attribute. If a source attribute belongs to a security policy instance, Workday adds it to the target tenant, unless you’ve selected the Override option when you edited migration behavior for security policies.
New	No attribute exists on the target tenant. Workday adds the source attribute to the target tenant.
Not Matching	Source and target attributes have different translation values. Workday merges the target translation value with the source translation value.

Attribute Status	Description
	Example: The source attribute has a Polish translation value and the target attribute has an English translation value. Migration adds the Polish translation value to the target attribute without changing the English value.
Removal	Attribute exists in target tenant but not in source. Migration removes the target attribute. Workday doesn't assign Removal status to attributes that are part of domain or business process security policies.

12. (Optional) When the migration contains Modified instances, click Manage Modified Instances on the Dependencies Diff page to exclude a modified instance or one of its dependencies from migration.
    a) In the Instances to Migrate table, clear the check box for the instance that you want to exclude. Excluding a top-level instance also excludes its dependencies from migration.
    b) (Optional) In the Dependencies column, click View to view the dependencies of an instance again.
    c) Click Save Changes and confirm that you want to save your selection. Once saved, you can't undo the exclusion. To undo the exclusion, start a new migration.

    On the Dependencies Diff page, Workday displays the instance as excluded in the table of instances. When you exclude a top-level instance, Workday reports the top-level instance as Excluded and its dependencies as Excluded by Parent. Workday doesn't exclude dependencies that are also dependencies of another implementation type if that implementation type is part of the same migration.

    You can also verify the excluded instance on the Excluded tab on the Pre-Migration Diff Report page.
13. When you've reviewed and understand the changes that migration will make to your target tenant, click Proceed with Migration to view a final summary of the instances to migrate.
14. Click Start Migration.
15. When the migration completes, click View Post Migration Report to see a summary of the changes in the target tenant.

    Postmigration summary reports remain available for 2 years.
16. (Optional) On the Post-Migration Report page, click Run Tenant Compare to compare instances of implementation types between 2 tenants.

    You can save the comparisons as Tenant Compare reports.

Result

When migration is successful, Workday makes the configuration package contents available in the target tenant.

Related Information

Tasks

Steps: Migrate Packages with Object Transporter on page 783

Reference

Reference: Best Practices for Migrating Integrations with Object Transporter on page 807

Migrate Single Instances with Object Transporter

Prerequisites

Configure access and security for Customer Central and Object Transporter.

See Steps: Configure Access to Customer Central and Object Transporter.

Context

In a tenant, you can migrate an individual instance of a supported implementation type to a target tenant by using the related actions menu of the instance. Example: In the sandbox tenant, you use the related actions menu of a custom report to migrate it to your production tenant. This method of migration saves you the effort of bundling multiple instances of implementation types in to configuration packages. The Object Transporter Supported Objects (OX) report details which objects you can migrate.

After you start the migration in your source tenant, Workday redirects you to Customer Central to complete the migration. Before Workday migrates the single instance, it compares it the corresponding instance on the target tenant and launches a series of checks to report issues that require resolution before migration can succeed.

See Concept: Object Transporter Migration Workflow.

When Workday completes the migration, you can view the Post Migration report, or create a Tenant Compare report to compare the differences between tenants after migration.

Steps

1. From the related actions menu of the instance that you want to migrate, select Instance > Migrate with Object Transporter.
2. If Workday leaves the Implementation Type prompt unpopulated, select a valid type for your migration.

   Workday enables Object Transporter to migrate instances of objects for a subset of implementation types. If Workday informs you it can't migrate using your selected implementation type, select another implementation type.
3. (Optional) Enter an External Change Request ID.

   This option enables you to track requested and approved migrations. You can view External Change Request ID flags in the Available for Migration from Source Tenant table. You can also view them with all migration activity in the Object Transporter Migration Reports (OX) dashboard in Customer Central.
4. Click Launch Object Transporter in Customer Central.
5. Sign in to Customer Central.
6. Select the Target Tenant to which you want to migrate your single instance.

   When you start migration from a source tenant, Customer Central prepopulates the task with your source tenant selections and displays the instance to migrate in the table.
7. Click Migrate.
8. On the Pre-Migration Status page, click Refresh or wait for Workday to complete the premigration check of the configuration data in scope for migration.

   Some instances have prerequisites that must exist in the target tenant for migration to succeed. Example: A calculated field. When Workday:

   - Finds missing prerequisites, it generates a Pre-Migration Check report.
   - Finds no missing prerequisites, it skips the Pre-Migration Check report and generates a View Pre-Migration Diff report.

9. Resolve any missing migration prerequisites that the premigration check finds in the target tenant:
    a) Click View Pre-Migration Check Report.
    b) Follow the guidelines on the Object Transporter Pre-Migration Check page.

       In the Errors table, Workday lists source instances that are prerequisites for migration. Workday flags a prerequisite as missing when it has:

       - No corresponding instances on the target tenant.
       - A missing or mismatched Reference ID.
    c) To resolve a prerequisite, sign in to the target tenant and create the missing instance or resolve its Reference ID.

       Note: You need the Reference ID of a compatible instance to map to it.

       You can also use Tailored Loading to map source instances that have no corresponding target instances to other compatible instances on the target tenant.
10. Use Tailored Loading to map any unmatched source instances to compatible instances on the target tenant:
    a) In the Errors table, click Map Instance for the missing prerequisite to resolve.
    b) Enter the Reference ID of a compatible instance on the target tenant.
    c) Click Search.
    d) In the table of results, select the check box for the compatible instance. When the table lists multiple instances, select the one that is:

       - The same implementation type.
       - The most compatible with the source tenant instance.
    e) Click Apply Mapping.

       To view information on the compatible instance, click the link for it in the Mapping to column.

       To remove a mapping, click Remove and follow the workflow to apply a new mapping.
    f) Click Rescan Target.

       When you've resolved all the missing prerequisites in the Errors table, Workday displays the Diff Report page to continue the migration.
11. If the instance has an effective date, click Set Effective Date Strategy.
    a) On the Set Date for Package prompt, first select a strategy for all instances in the migration.

       You can apply a default effective date of 01/01/1900 or manually select a date. If you're migrating a single instance, any dependencies of the instance inherit the date you select here.

       If an instance without an effective date has dependencies with effective dates, the dependencies inherit the date of migration as their effective date during the migration process.

       You can always change effective dates after migration. You can also further refine your effective date strategy by selecting different dates for instances and dependencies individually, or as a group, by implementation type.
    b) To apply different effective dates at the implementation type or instance level, click Save and Continue Editing.
    c) To select a different effective date for all instances of an implementation type, select a date in the Set Effective Date By Implementation Type column.

       To change the year, enter it directly in the field.
    d) To change the effective date of 1 or more unique instances or dependencies, click Set Effective Date by Instance.
    e) Select a new effective date for an instance in the Set Effective Date by Instance column.

       Workday displays both instances and their dependencies as separate rows in the table. To change the year for an instance or dependent instance, enter the year directly in the field.

12. (Optional) If your instance is domain or business process security policy and differs from the corresponding policy on the target tenant, click Edit Migration Behavior to select how Workday migrates it.

    Note: Workday only enables this option when it detects 1 or more modified security policies.

Option	Description
Merge (Recommended)	Default behavior. Combines permission-holding components such as security groups and roles from all modified source security policies with those in the corresponding target security policies. Merges are additive. Workday removes nothing, making it the safest option. Consider this option when you need to: • Prioritize target tenant integrity. • Migrate routine updates from a preview, sandbox, or development environments to production, where the goal is to introduce new configurations without disturbing existing ones. • Mitigate the risk of inadvertently removing permissions or security groups that are critical for target tenant operation. • Protect target-specific changes. Because Merge is non destructive by default, it reduces time spent on checking for potential overwrites, enabling you to focus more on verifying the additions.
Override	Replaces all security policies on the target tenant with the corresponding modified ones on the source tenant. When replacing, Workday discards the previous corresponding policies on the target tenant and implements only the modified security policies from the source tenant. Consider this option when you need to: • Treat the source tenant as the authoritative source for security policies. • Perform initial deployments or tenant refreshes. • Intentionally replace target security policies fully. • Ensure absolute consistency with the source. Note: When you migrate a single instance, Workday replaces only the corresponding instance on the target tenant.
Manual Selection	Provides the most granular control, enabling you to review each modified security policy in the package individually. In the Migration

Option	Description
	Behavior per Instance column, select Merge or Override for each modified security policy. Consider this option when you need to: • Handle complex migrations with diverse policy-specific needs. • Address mixed requirements in a single package where different policies need different merge or override behavior applied to them. • Operate in sensitive environments that demand meticulous control over each policy. • Manage phased rollouts or policies handled by different teams. • Achieve maximum precision and flexibility, tailoring action to each policy.

13. Click Refresh or wait for Workday to display View Diff Report and click it.

    The Pre-Migration Diff Report page displays all instances in scope for migration, grouped by the implementation type of the top-level instance, and organized by migration behavior these tabs:

Tab	Description
All Instances	Lists all instances that your configuration package, or configuration extract contains. When you migrate a single instance, the tab displays 1 top level instance and any dependent objects it may contain.
Modified Status icon: Orange	Lists instances that exist in both the source and target tenants but differ because of a previous modification. During migration, Workday overwrites the target instance with the source instance unless it is a security policy. By default, Workday merges security policies from a source tenant with the corresponding security policy on the target tenant. You can change default behavior for security policy migration by using the Edit Migration Behavior option to overwrite the tenant security policy.
New Status icon: Blue	Lists instances that don't yet exist exist in the target tenant. During migration, Workday adds the instance from the source tenant to the target tenant.
No Change Status icon: Gray	Lists instances that are identical in the source and target tenants. No migration is necessary.
Excluded	Lists top-level instances that you've excluded from the migration.

Tab	Description
	If you haven't excluded anything, Workday doesn't display this tab.

You can select a tab to filter by migration behavior. On the tab, you can expand an implementation type to review the top-level instances in scope for migration. The same inplementation type can appear on multiple tabs, but the instances listed under it only relate to a particular migration behavior. Example: You select the Modified tab and see the same implementation type that you saw on the New tab. You expand the implementation type and see a unique set of of top-level instances from the instances on the New tab. The Modified tab lists instances with differences between the source and target instances. The New tab lists instances that don't yet exist on the target tenant.

The number beside the Modified status indicates the total number of top-level modified instances in scope for migrtation. The number beside the New status indicates the total number of top-level instances that Workday will add to the target tenant.

Note: Pre-Migration Diff reports for migrations that don't proceed remain available for 30 days

.

14. (Optional) Review the dependencies of the new or modified instance or instances:
    a) Navigate to the Modified or New tab and expand the implementation type.
    b) In the Dependencies column of the table, click View Dependencies for the instance with dependencies you want to review.

       Workday recommends that you examine the dependent objects in new or modified instances.

       Like top-level instances, Workday provides a status icon for each dependent instance: Modified, New, or No Change.

       Note: When Workday encounters a circular dependency, it stops loading any more dependencies for the instance. Workday migrates circular dependencies. To prevent repetitive reporting of the same dependency, it only displays the first occurrence of the dependency and flags it with a circular dependency icon.
15. (Optional) To view the attributes for a modified instance, click View Attribute Diff to examine the individual attributes in the modified dependency object.

    On the Attribute Diff page, Workday provides a status icon for each attribute of a Modified instance. The following table describes how Workday categorizes the differences between source and target attributes:

Attribute Status	Description
Change	Source and target attributes exist but aren’t identical. Migration overwrites the target attribute with the source attribute. If a source attribute belongs to a security policy instance, Workday adds it to the target tenant, unless you’ve selected the Override option when you edited migration behavior for security policies.
New	No attribute exists on the target tenant. Workday adds the source attribute to the target tenant.
Not Matching	Source and target attributes have different translation values. Workday merges the target translation value with the source translation value.

Attribute Status	Description
	Example: The source attribute has a Polish translation value and the target attribute has an English translation value. Migration adds the Polish translation value to the target attribute without changing the English value.
Removal	Attribute exists in target tenant but not in source. Migration removes the target attribute. Workday doesn’t assign Removal status to attributes that are part of domain or business process security policies.

16. When you've reviewed and understand the changes that migration will make to your target tenant, click Proceed with Migration to view a final summary.
17. Click Start Migration.
18. When the migration completes, click View Post Migration Report to see a summary of the changes in the target tenant.

    Postmigration summary reports remain available for 2 years.
19. (Optional) On the Post-Migration Report page, click Run Tenant Compare to compare instances of implementation types between 2 tenants.

    You can save the comparisons as Tenant Compare reports.

Result

When migration is successful, Workday makes the single instance data available in the target tenant.

Related Information

Concepts

Concept: Object Transporter on page 776

Migrate Configuration Catalog Content with Object Transporter

Prerequisites

Configure access and security for Customer Central and Object Transporter

See Steps: Configure Access to Customer Central and Object Transporter

Context

You can use the Tenant Dashboard in Customer Central or the Configuration Catalog task to migrate a Configuration Catalog package or 1 or more instances of the package to your implementation or sandbox tenant.

After you select a target tenant and a configuration package in the catalog, Workday compares the instances you've selected in the catalog with the corresponding instances on the target tenant and launches a series of checks to prepare the migration.

See Concept: Object Transporter Migration Workflow

Note: If you're migrating reports, consider the downstream impact to edited reports in lower level tenants so that you don't migrate potential issues. Workday recommends that you validate reports after migrating them and consider the downstream impact to alerts and other processes.

When Workday completes the migration, you can view the Post Migration report, or create a Tenant Compare report to compare the differences between tenants after migration.

Steps

1. Sign in to Customer Central as a Customer Central user or administrator.
2. Access the Configuration Catalog task.

   The task is also available from the Tenant Dashboard worklet.
3. From the Target Tenant prompt, select the tenant to which to migrate the Configuration Catalog content.
4. Select a configuration package.

   You can click the Name column heading and filter to find your package.
5. Click Configure Package Instances.
6. Select 1 or more instances to migrate.

   To migrate the entire package, select the check box in the table header.
7. On the Pre-Migration Status page, click Refresh or wait for Workday to complete the premigration check of the configuration data in scope for migration.

   Some instances have prerequisites that must exist in the target tenant for migration to succeed. Example: A calculated field. When Workday:

   - Finds missing prerequisites, it generates a Pre-Migration Check report.
   - Finds no missing prerequisites, it skips the Pre-Migration Check report and generates a View Pre-Migration Diff report.
8. Resolve any missing migration prerequisites that the premigration check finds in the target tenant:
   a) Click View Pre-Migration Check Report.
   b) Follow the guidelines on the Object Transporter Pre-Migration Check page.

      In the Errors table, Workday lists source instances that are prerequisites for migration. Workday flags a prerequisite as missing when it has:

      - No corresponding instances on the target tenant.
      - A missing or mismatched Reference ID.
   c) To resolve a prerequisite, sign in to the target tenant and create the missing instance or resolve its Reference ID.

      Note: You need the Reference ID of a compatible instance to map to it.

      You can also use Tailored Loading to map source instances that have no corresponding target instances to other compatible instances on the target tenant.
9. Use Tailored Loading to map any unmatched source instances to compatible instances on the target tenant:
   a) In the Errors table, click Map Instance for the missing prerequisite to resolve.
   b) Enter the Reference ID of a compatible instance on the target tenant.
   c) Click Search.
   d) In the table of results, select the check box for the compatible instance. When the table lists multiple instances, select the one that is:

      - The same implementation type.
      - The most compatible with the source tenant instance.
   e) Click Apply Mapping.

      To view information on the compatible instance, click the link for it in the Mapping to column.

      To remove a mapping, click Remove and follow the workflow to apply a new mapping.
   f) Click Rescan Target.

      When you've resolved all the missing prerequisites in the Errors table, Workday displays the Diff Report page to continue the migration.

10. If your selected content in the Configuration Catalog contains instances with effective dates, click Set Effective Date Strategy.
    a) On the Set Date for Package prompt, first select a strategy for all instances in the migration.

       You can apply a default effective date of 01/01/1900 or manually select a date. If you're migrating a single instance, any dependencies of the instance inherit the date you select here.

       If an instance without an effective date has dependencies with effective dates, the dependencies inherit the date of migration as their effective date during the migration process.

       You can always change effective dates after migration. You can also further refine your effective date strategy by selecting different dates for instances and dependencies individually, or as a group, by implementation type.
    b) To apply different effective dates at the implementation type or instance level, click Save and Continue Editing.
    c) To select a different effective date for all instances of an implementation type, select a date in the Set Effective Date By Implementation Type column.

       To change the year, enter it directly in the field.
    d) To change the effective date of 1 or more unique instances or dependencies, click Set Effective Date by Instance.
    e) Select a new effective date for an instance in the Set Effective Date by Instance column.

       Workday displays both instances and their dependencies as separate rows in the table. To change the year for an instance or dependent instance, enter the year directly in the field.
11. (Optional) If your package contains domain or business process security policies that differ from the corresponding policies on the target tenant, click Edit Migration Behavior and select a migration behavior for all or some of the modified security policies.

    Note: Workday only enables this option when it detects 1 or more modified security policies.

Option	Description
Merge (Recommended)	Default behavior. Combines permission-holding components such as security groups and roles from all modified source security policies with those in the corresponding target security policies. Merges are additive. Workday removes nothing, making it the safest option. Consider this option when you need to: • Prioritize target tenant integrity. • Migrate routine updates from a preview, sandbox, or development environments to production, where the goal is to introduce new configurations without disturbing existing ones. • Mitigate the risk of inadvertently removing permissions or security groups that are critical for target tenant operation. • Protect target-specific changes. Because Merge is non destructive by default, it reduces time spent on checking for potential overwrites, enabling you to focus more on verifying the additions.
Override	Replaces all security policies on the target tenant with the corresponding modified

Option	Description
	ones on the source tenant. When replacing, Workday discards the previous corresponding policies on the target tenant and implements only the modified security policies from the source tenant. Consider this option when you need to: • Treat the source tenant as the authoritative source for security policies. • Perform initial deployments or tenant refreshes. • Intentionally replace target security policies fully. • Ensure absolute consistency with the source. Note: When you migrate a single instance, Workday replaces only the corresponding instance on the target tenant.
Manual Selection	Provides the most granular control, enabling you to review each modified security policy in the package individually. In the Migration Behavior per Instance column, select Merge or Override for each modified security policy. Consider this option when you need to: • Handle complex migrations with diverse policy-specific needs. • Address mixed requirements in a single package where different policies need different merge or override behavior applied to them. • Operate in sensitive environments that demand meticulous control over each policy. • Manage phased rollouts or policies handled by different teams. • Achieve maximum precision and flexibility, tailoring action to each policy.

12. Click Refresh or wait for Workday to display View Diff Report and click it.

    The Pre-Migration Diff Report page displays all instances in scope for migration, grouped by the implementation type of the top-level instance, and organized by migration behavior these tabs:

Tab	Description
All Instances	Lists all instances that your configuration package, or configuration extract contains. When you migrate a single instance, the tab displays 1 top level instance and any dependent objects it may contain.
Modified Status icon: Orange	Lists instances that exist in both the source and target tenants but differ because of a previous modification. During migration,

Tab	Description
	Workday overwrites the target instance with the source instance unless it is a security policy. By default, Workday merges security policies from a source tenant with the corresponding security policy on the target tenant. You can change default behavior for security policy migration by using the Edit Migration Behavior option to overwrite the tenant security policy.
New Status icon: Blue	Lists instances that don't yet exist exist in the target tenant. During migration, Workday adds the instance from the source tenant to the target tenant.
No Change Status icon: Gray	Lists instances that are identical in the source and target tenants. No migration is necessary.
Excluded	Lists top-level instances that you've excluded from the migration. If you haven't excluded anything, Workday doesn't display this tab.

You can select a tab to filter by migration behavior. On the tab, you can expand an implementation type to review the top-level instances in scope for migration. The same inplementation type can appear on multiple tabs, but the instances listed under it only relate to a particular migration behavior. Example: You select the Modified tab and see the same implementation type that you saw on the New tab. You expand the implementation type and see a unique set of of top-level instances from the instances on the New tab. The Modified tab lists instances with differences between the source and target instances. The New tab lists instances that don't yet exist on the target tenant.

The number beside the Modified status indicates the total number of top-level modified instances in scope for migrtation. The number beside the New status indicates the total number of top-level instances that Workday will add to the target tenant.

Note: Pre-Migration Diff reports for migrations that don't proceed remain available for 30 days

.

13. (Optional) Review the dependencies of the new or modified instance or instances:
    a) Navigate to the Modified or New tab and expand the implementation type.
    b) In the Dependencies column of the table, click View Dependencies for the instance with dependencies you want to review.

       Workday recommends that you examine the dependent objects in new or modified instances.

       Like top-level instances, Workday provides a status icon for each dependent instance: Modified, New, or No Change.

       Note: When Workday encounters a circular dependency, it stops loading any more dependencies for the instance. Workday migrates circular dependencies. To prevent repetitive reporting of the same dependency, it only displays the first occurrence of the dependency and flags it with a circular dependency icon.

14. (Optional) To view the attributes for a modified instance, click View Attribute Diff to examine the individual attributes in the modified dependency object.

    On the Attribute Diff page, Workday provides a status icon for each attribute of a Modified instance. The following table describes how Workday categorizes the differences between source and target attributes:

Attribute Status	Description
Change	Source and target attributes exist but aren't identical. Migration overwrites the target attribute with the source attribute. If a source attribute belongs to a security policy instance, Workday adds it to the target tenant, unless you've selected the Override option when you edited migration behavior for security policies.
New	No attribute exists on the target tenant. Workday adds the source attribute to the target tenant.
Not Matching	Source and target attributes have different translation values. Workday merges the target translation value with the source translation value. Example: The source attribute has a Polish translation value and the target attribute has an English translation value. Migration adds the Polish translation value to the target attribute without changing the English value.
Removal	Attribute exists in target tenant but not in source. Migration removes the target attribute. Workday doesn't assign Removal status to attributes that are part of domain or business process security policies.

15. (Optional) When the migration contains Modified instances, click Manage Modified Instances on the Dependencies Diff page to exclude a modified instance or one of its dependencies from migration.
    a) In the Instances to Migrate table, clear the check box for the instance that you want to exclude. Excluding a top-level instance also excludes its dependencies from migration.
    b) (Optional) In the Dependencies column, click View to view the dependencies of an instance again.
    c) Click Save Changes and confirm that you want to save your selection. Once saved, you can't undo the exclusion. To undo the exclusion, start a new migration.

    On the Dependencies Diff page, Workday displays the instance as excluded in the table of instances. When you exclude a top-level instance, Workday reports the top-level instance as Excluded and its dependencies as Excluded by Parent. Workday doesn't exclude dependencies that are also dependencies of another implementation type if that implementation type is part of the same migration.

    You can also verify the excluded instance on the Excluded tab on the Pre-Migration Diff Report page.
16. When you've reviewed and understand the changes that migration will make to your target tenant, click Proceed with Migration to view a final summary of the instances to migrate.
17. Click Start Migration.

18. When the migration completes, click View Post Migration Report to see a summary of the changes in the target tenant.

    Postmigration summary reports remain available for 2 years.
19. (Optional) On the Post-Migration Report page, click Run Tenant Compare to compare instances of implementation types between 2 tenants.

    You can save the comparisons as Tenant Compare reports.

Next Steps

When you've refined your configuration content to meet your customers' requirements, you can migrate the Configuration Catalog content from your sandbox tenant to the Production tenant.

See Set Up Customer Central Production Access.

Related Information
Concepts

Concept: Configuration Catalog on page 763

Reference

Preconfigured Content: Configuration Catalog

Migrate X.509 Private Key Pairs

Prerequisites

Configure Object Transporter Security Permissions on page 784.

Context

Using Customer Central, you can migrate X.509 private key pairs between your implementation tenants or any non-Production tenants. Workday currently doesn't support migration for X.509 public keys.

Steps

1. Sign in to Customer Central as a Customer Central User or Administrator.
2. Access the Migrate x509 Private Key Pair task.

   Note: Workday doesn't make this task automatically available. To access it, Customer Central implementers and users must configure Object Transporter security permissions by:

   - Creating a Migration Administrator user-based security group.
   - Adding both View and Modify and Get and Put permissions to the *Special OX Web Services* and *OX for Non-implementers* domain security policies as appropriate.
   - Adding implementers and users who need to migrate X.509 private key pairs to the Migration Administrator security group.
3. Select a source and target tenant.

   Select only non-Production tenants.
4. In the table, enter the reference ID for the X.509 key pair or pairs to migrate.

   Enter 1 key pair for each table row.
5. Verify migration results in the Migrate x509 Private Key Pair task.

Related Information
Concepts

Concept: X.509 Certificates in Workday

Steps: Migrate Translated Objects

Prerequisites

Configure access and security for Customer Central and Object Transporter:

See Steps: Configure Access to Customer Central and Object Transporter.

Context

Using Object Transporter, you can migrate any instance of a supported implementation type that contains translated values in their translatable fields. As you migrate, you can use the premigration Diff report to view the translation values in source and target tenants before migration. Workday never overwrites the translated values in the target tenant before migration.

After migration completes, you can use the postmigration summary report to confirm migration success. Using Tenant Compare, which Workday makes available after migration in the Object Transporter workflow you can also compare instances of the implementation types between the source to target tenants and then save the comparisons as Tenant Compare reports.

Steps

1. Enable the relevant languages in your source tenant and any tenant to which you want to migrate.

   See Reference: Edit Tenant Setup - Global.

   Security: *Set Up: Tenant Setup - Global* domain in the System functional area.
2. Enter translations in your source tenant for a migratable instance.

   For a list of Workday objects and how to add translations to them, see Reference: Translations.
3. To ensure that the Implementation Types for the instances you want to translate can migrate, view the tenanted Object Transporter Supported Objects (OX) report.
4. (Optional) Create Configuration Packages with Object Transporter.

   If you're adding translations to an object that you want to package with other objects, create a configuration package.
5. Migrate the object with translated values in 1 of these ways:

   - Migrate Single Instances with Object Transporter.

     Use this method when you've added translation values to a single instance.
   - Migrate Packages with Object Transporter.

     Use this method when you've added translation values to 1 or more instances and have bundled the instances in a configuration package.
6. On the Pre-Migration Diff Report page, compare the premigration status of translated values in the source and target tenants.

   a) On the Modified tab, expand the implementation types to view the top-level instances.

      Workday enables you to compare translated values only for modified instances at the level of the modified dependency.

      Example: When you create a new object and add a translation value to it at the same time, Workday displays it on the New tab, which doesn't include views into the attributes the enable you to view translations. When you add, change, or remove a translation value to an already existing object instance, Workday displays the instance on the Modified tab, which enables you to view and therefore compare attribute values such as translations.

b) Click View Dependencies for each new or modified top-level instance.

The Dependencies Diff report shows you whether there are modifications to dependencies that, when migrated, will change corresponding target tenant dependencies in some way.

The listed dependencies may or may not have attributes with translated values. You can examine translated values of modified dependencies in the Attribute Diff report.

c) On the Dependencies Diff page, click View Attribute Diff for every modified dependency.

d) On the Attribute Diff page, compare translated values in the side-by-side view. The left sides displays the translated values in the source tenant. The right side displays the corresponding translated values in the target tenant.

Workday assigns a Not Matching status to new, modified, or removed translated values and highlights them green. The source and target side-by-side view enables you to quickly assess the impact on the target tenant.

Note: If you don't want to include translated values in a migration, clear the Include Translations? check box during the migration process in Customer Central.

7. (Optional) When migration completes:

a) Click View Post Migration Report .

b) Click View to verify that the instances migrated successfully.

Postmigration summary reports remain available for 2 years.

c) (Optional) On the Post-Migration Report page, click Run Tenant Compare to compare instances of implementation types between 2 tenants. You can save the comparisons as Tenant Compare reports.

Related Information

Concepts

Concept: Translations on page 368

Tasks

Steps: Migrate Packages with Object Transporter on page 783

Steps: Manage Translations on page 360

Reference

FAQ: Migrating Translations on page 810

Reference: Best Practices for Migrating Integrations with Object Transporter

To migrate integration systems successfully to target tenants using Object Transporter, Workday recommends these guidelines.

Item to Migrate	Best Practice	Link
Pretty Good Privacy (PGP)	Workday's security model prevents the migration of PGP private keys. If you need private keys for the data you migrate, create them first in your Production or Gold tenants. Then, refresh your tenant from Production so that it has the private keys.	Create a PGP Private Key Pair
X.509 private keys	Use the Migrate x509 Private Key Pair task in Customer Central to migrate X.509	Create an X.509 Private Key Pair Migrate X.509 Private Key Pairs on page 805

Item to Migrate	Best Practice	Link
	private key pairs between non-Production tenants.	
Integration system users (ISU) Integration system Security Segments, also known as Groups (ISSG)	Before you perform a migration using the implementation type, *Integration Systems*, set up the ISU account or ISSG in the target tenant. When the integration completes successfully, Workday automatically attaches the ISU to the integration system.	Steps: Grant Integration or External Endpoint Access to Workday
Business Process Definitions	If your integration uses 1 or more Business Process Definitions, add *Business Process Definitions* as a separate implementation type in the Configuration Package you're creating for the *Integration Systems* implementation type.	Create Configuration Packages for Object Transporter on page 785
Custom Reports	If your integration uses Custom Reports, add *Custom Reports* as an implementation type in the Configuration Package you're creating for the *Integration Systems* implementation type.	Create Configuration Packages for Object Transporter on page 785
Workday Studio project Cloud Archive (CLAR) file	When Workday migrates CLAR files, it doesn't update the Deployed DateTime or Deployed By values to the date and time or person of migration. This value remains unchanged by design because it represents the original date and time of deployment from Workday Studio rather than the date and time of migration. To audit project migration dates, use the View User or Task or Object Audit Trail task to display date changes.	As designed.

Related Information
Tasks
Steps: Migrate Packages with Object Transporter on page 783

Reference: Payroll and Object Transporter

You can migrate these Payroll objects between tenants using Object Transporter:

- Advanced Lookup Tables

- Aggregate Calculations
- Arithmetic Calculations
- Build Date Calculations
- Conditional Calculations
- Constant Date Calculations
- Constant Value Calculations
- Date Difference Calculations
- Date Extract Calculations
- Date Increment/Decrement Calculations
- Deductions
- Earnings
- Gross-Up Configuration
- Gross-Up Priorities
- Input Value Lookup Tables
- Instant Set Comparison Calculations
- Instance Value Calculations
- Logic Calculations
- Lookup Calculations
- Lookup Tables
- Maintain Audit Configuration - Results by Period
- Maintain Payroll Audit Configurations - Compare Periods
- Maintain Payroll Proration Overrides
- Net Pay Validation and Arrears
- Pay Accumulations
- Pay Balances
- Pay Component Groups
- Pay Component Security Segment
- Pay Group Automatic Assignment Rules
- Pay Group Rules
- Pay Groups
- Pay Results CRF Mappings
- Pay Results CRF Mappings - Balance Period Mappings
- Pay Retro Calculation Processing Configurations
- Payroll Action Reason
- Payroll Audit Configurations
- Payroll Audit Run Group
- Payroll Audit Worker Eligibilities
- Payroll Input Templates
- Payroll Prism Prove Mappings
- Payroll Proration Overrides
- Payroll Register by Period Configurations
- Payroll Register Task Configurations
- Pay Run Groups
- Related Calculations
- Run Categories
- Step-Based Calculation Condition
- Step-Based Calculation Condition Groups
- Step-Based Calculations
- Tax Authority Exceptions Pay Component Groups
- Value Comparison Calculations

- Voluntary Deduction Configuration

Things to Consider

For pay component related calculations:

- You must migrate them either before you migrate or as you migrate generic calculations.
- You must migrate pay component related calculations name changes before you migrate the pay component or as part of a configuration package that includes that generic calculation.
- When you remove optional values in your calculations, then migrate those objects to a new tenant where that value already exists, the empty value doesn't migrate. Workday recommends you wait to remove the optional values until after you migrate to the new tenant.
- When you migrate Advanced Lookup tables, you must adjust the effective date of an existing snapshot in the new tenant after migration.

You can't migrate snapshots later than today's date, only the most recent snapshot that is today's date or earlier. When migrating deductions, ensure their package effective date is later than the earliest snapshot date. The same rule applies to earnings the package effective date must be later than the earliest snapshot date.

When migrating tax authority exception pay component groups, the process won't generate new earnings, deductions, or pay component groups that don't already exist in the target tenant.

Related Information
Reference
2024R2 Feature Release Note: Object Transporter for Payroll

FAQ: Migrating Translations

How do I know which migratable Implementation Types contain translatable fields?	You can view these reports: • The tenanted Object Transporter Supported Objects (OX) report in Workday. It includes information about translatable and migratable fields. To view the report, you must have access to the *OX for Non Implementers* domain in the Implementation functional area. • The Translatable Tenant Classes and Ref ID Indexes report in the Translations Hub. It includes information about what you can translate in your tenant. To view the report, you must have access to the *Data Translation* domain in the System functional area.
Why don't I see translations included in my migration?	You might be migrating a nontranslatable object. Not all objects in Workday are available for translation. To verify that your object is translatable, access the Object Transporter Supported Objects (OX) report in Workday.
Why are some translation values for my object missing from the Attribute Diff report?	You might not have enabled the relevant languages in your target tenant. Object Transporter only migrates translated values for languages that you enable in the target tenant. Access the Edit Tenant Setup - Global report to verify that the correct languages are enabled for your target tenant. To view the report, you must have access to the *Set*

	Up: Tenant Setup - Global domain in the System functional area.
How do I prevent translations from migrating?	There are several ways to prevent Object Transporter from migrating translation values: • During a migration workflow, clear the Include Translations? check box. • To stop Object Transporter from migrating translations for a particular language, disable the language in your target tenant. You must have access to the *Set Up: Tenant Setup - Global* domain in the System functional area.

Related Information

Tasks

Steps: Migrate Translated Objects on page 806

Configuration Change Tracker

Concept: Configuration Change Tracker

The Configuration Change Tracker (Change Tracker) report is an implementation tool that reports changes to configuration data in a tenant over a selected timeframe and by selected users. It frees you from having to track your tenant changes manually in preparation for later migration. It also enables you to see who else has made changes in a tenant.

Example. After making changes to configuration data in a Sandbox tenant and verifying that the changes work well, you want to migrate the changes to your Production tenant. First you need a list of the changes you made so you know what to migrate. Rather than recording each change manually, you use Configuration Change Tracker to provide a report for changes made:

- During the date range you specify.
- By you and any other users you want to include.
- Using or not using web services.

The report organizes the configuration changes into Ready to Migrate and Not Ready to Migrate.

Note: Configuration Change Tracker only returns changed instances that belong to an implementation type that Workday can migrate. When a changed instance doesn't have an implementation type, Change Tracker doesn't report the change to the instance and Workday doesn't migrate the instance.

Configuration Change Tracker can include up to 2 million configuration changes in a report. This limit is based on the total number of changes in the tenant, not the number of configuration changes.

Report Organization

Configuration Change Tracker displays and organizes this information to help you prepare for migration:

Tab	Contents
Ready to Migrate	Lists changed instances in the tenant that you can migrate without further modification. Depending on the type of change, the report might display: • The last modified date of the change. • The Implementation Type and the Primary Instance. • The Reference ID of the Primary Instance. • The method of change: Manually in Workday or through a web service.

Tab	Contents
	• A change flagged as a new instance. • The user making the change. For each instance, you can click View Changes to see an audit trail of changes for the Primary Instance.
Not Ready to Migrate	Lists changes that you probably don't want to migrate, such as deleted instances. It also includes instances that might cause problems, such as missing reference IDs or instances that might not work correctly with the web service. Depending on the reason an instance isn't ready for migration, the report might display: • The timestamp for the last change. • The Implementation Type, Related Implementation Type, and Primary Instance. • The Workday task used to make the change. • The Reference ID of the Primary instance. • The method of change: Manually in Workday, through a web service, or unclassified. • The tool used to make the change, such as Object Transporter (OX) or Enterprise Interface Builder (EIB). • A change flagged as a new instance. • The user making the change. For each instance, you can click View Changes to see an audit trail of changes for the Primary Instance.

Access to Configuration Change Tracker

Security administrators can enable user access to Configuration Change Tracker by making them part of the security group that has access to 1 of these domains:

Domain	User Access	Permissions
Manage: Configuration Change Management - Restricted	Self auditor Enables users to access Configuration Change Tracker and view and create their own reports.	View and Modify
Configuration Change Management	Global auditor Enables users to access Configuration Change Tracker, create their own reports, and view other's reports.	View and Modify

Domain	User Access	Permissions
Manage: Configuration Change Management Migrations - Restricted	Self packager Enables users to create and edit thier own Advanced configuration packages from Change Tracker.	View and Modify
Manage: Configuration Change Management Migrations	Global packager Enables users to create and edit thier own and other's Advanced configuration packages from Change Tracker.	View and Modify

Configure access for each tenant in which you want to run the Configuration Change Tracker. To view previously run reports, users can access the report, View Change Tracker Reports.

Migrating Configuration Changes

You can use Configuration Change Tracker to package the change lists from reports and migrate the changes to Workday tenants in any environment. It's an effective and safe method of synchronizing populated tenants with changes made by specific users and timeframes.

Migrating from Configuration Change Tracker has the added advantage of enabling you to package objects of any implementation type. It reports only migratable instances, which you select, validate, and revise to create an Advanced configuration package. Object Transporter doesn't add dependent instances to the package during the migration process as it does with standard configuration packages. Thus, you migrate only the instances you've vetted and have access to, ensuring a safer and less problematic migration.

To migrate Advanced configuration packages from Configuration Change Tracker, a Customer Central security administrator must grant you access on the Maintain Access to Customer Central Tooling task by selecting the OX Migration: Full Object Coverage check box.

Configuration Package Filtering

When you create a configuration package in Configuration Change Tracker, you can select to include all instances from a report or create a targeted package that contains only new or modified instances. This filtering capability provides more precise control over configuration package migrations, which saves time and reduces the manual effort required to prepare packages. By including only new or modified instances, you can synchronize configurations between tenants more efficiently and lower the risk of errors that result from manually editing large packages after you create them.

Audit Trails

You can leverage the powerful auditing capabilities of Configuration Change Tracker with your other auditing processes. View the details on configuration changes made in a tenant by selecting View Changes for a primary instance. Configuration Change Tracker reports all direct changes to objects. It doesn't report any behavioral changes as a result of the direct change to the object.

Example: You make a change to a calculated field that also results in a change to a condition rule associated with that calculated field. Change Tracker only reports the change to the calculated field. It doesn't report the change to the condition rule, which is a behavioral change.

Example

Watch the video 4m 19s

Configure Security for Configuration Change Tracker

Prerequisites

- Customer Central security administrator account.
- Security: *Security Configuration* domain in the System functional area.

Context

Workday provides different security domains for Configuration Change Tracker users depending on whether they manage only their own configuration changes or also manage other users' changes:

- Self Auditors or Packagers: These users only manage their own changes. Grant them permissions to domains that include the word, Restricted
- Global Auditors or Packagers: These users manage others' changes, which includes self-management. Grant them permissions to global domains, which do not include the word, Restricted.

Consider creating separate security groups for these two user types.

Steps

1. Sign on to the tenant as a security administrator.
2. Access the Create Security Group task.

   Create a user-based security group for Configuration Change Tracker users. If your organization restricts the scope of some users to only their own configuration changes, consider creating a separate user-based security group for them so that you have different security groups for each type of user. Example: Configuration Change Tracker Self and Configuration Change Tracker Global.
3. Access the Maintain Permissions for Security Group task.

   Depending on the user goal, add these domains and permissions to enable access to Configuration Change Tracker capabilities.

   To create Advanced configuration packages, you must assign a user both an auditor and packager domain.

User	Domain	Permissions
Self auditor Enables users to access Configuration Change Tracker and view and create their own reports.	*Manage: Configuration Change Management - Restricted*	View and Modify
Global auditor Enables users to access Configuration Change Tracker, create their own reports, and view others' reports.	*Configuration Change Management*	View and Modify
Self packager Enables users to create and edit thier own Advanced configuration packages from Change Tracker.	*Manage: Configuration Change Management Migrations - Restricted*	View and Modify
Global packager	*Manage: Configuration Change Management Migrations*	View and Modify

User	Domain	Permissions
Enables users to create and edit thier own and others' Advanced configuration packages from Change Tracker.		

To migrate Advanced configuration packages from Configuration Change Tracker, you also have to configure user security for Object Transporter.

See Configure Object Transporter Security Permissions on page 784.

4. Activate Pending Security Policy Changes.

Next Steps

Migrate Configuration Changes with Configuration Change Tracker

Prerequisites

- Access to migrate Advance configuration packages on the Maintain Access to Customer Central Tooling task.

  See Manage Access to Customer Central Implementation Tools on page 750.
- Set up access to Customer Central and configure Object Transporter security.

  See Steps: Configure Access to Customer Central and Object Transporter on page 782.
- Security: *Configuration Change Management* domain with View and Modify permissions in the Implementation functional area.

Context

Use Configuration Change Tracker migration to synchronize configurations between tenants. To migrate, you start in Configuration Change Tracker and create a report of configuration changes made by specific users and in the timeframes you specify. This report is your change list, from which you create a configuration package. You can modify the package until you have only the instances you want to migrate.

Before Change Tracker redirects you to Customer Central and Object Transporter, you can run validation checks to resolve possible missing IDs, ID conflicts, or exception errors. In Object Transporter, you can complete the migration process, with much of the work already done by Configuration Change Tracker.

Steps

1. Sign in to the tenant with the configuration you want to synchronize with another tenant.
2. Access the Configuration Change Tracker task.
3. On the Configuration Change Tracker page, create a change list of the configuration changes to migrate:

Option	Description
From Moment To Moment	Select the date and time range for the configuration changes you want to capture.
Filtered by Users	Select 1 or more users who made the changes you want to capture.

Option	Description
Include Changes Made via Web Services	Select this check box if any of the selected users made configuration changes by a Workday web service.

You can further filter your change list by implementation type in Additional Filters, or you can select an existing report from the Latest Reports.

Workday automatically saves your change list as a Configuration Change Tracker report.

Click Refresh or wait for the report to populate.

4. On the Report Criteria page for your report, review the change list for the users and timeframe you selected.

   Click View Changes for an instance to review its attribute details. You can package instances listed on the Ready to Migrate tab without further action.

   Workday doesn't include instances on the Not Ready to Migrate tab in configuration packages. You must manually add them when you modify the package on the Configure Package Instances page, although most Not Ready to Migrate instances don't make sense to add. Examples: Do Not Use (DNU) or deleted instances.

   You can view a complete list of reasons why instances display on the Not Ready to Migrate tab.

   See Concept: Configuration Change Tracker on page 811.
5. Click Create Configuration Package to create an Advanced configuration package of the instances listed on the Ready to Migrate tab.

   You can rename the package or add a description or an external change request ID.
6. Select to include all instances, or only new or modified ones:

Option	Description
All Instances	Includes all instances from the Ready to Migrate tab of Configuration Change Tracker and matches the previous behavior. This is the default selection.
New Instances Only	Includes only only the new instances created in the specified date range by the selected users. Selecting this option creates a targeted package, enabling you to more efficiently synchronize configurations between tenants and lower the risk of errors that can result from manually editing large packages.
Modified Instances Only	Includes only the instances edited in the specified date range by the selected users. Selecting this option creates a targeted package, enabling you to more efficiently synchronize configurations between tenants and lower the risk of errors that can result from manually editing large packages.

When Object Transporter migrates Advanced configuration packages, it migrates only the instances that you select for the package. It doesn't add other dependent instances after migration starts, as it does with standard configuration packages. This method narrows the migration scope to known instances, ensuring a less problematic migration.

When ready, click Configure Package Instances to create the package.

7. On the Configure Package Instances page, add or remove instances and implementation types until you have the only instances that you want to migrate.

   If you've identified any instances from the Not Ready to Migrate tab that you want to add, do so here.

   a) To add or remove an instance, click Edit Instances > Add Instances or Edit Instances > Remove Instances and select 1 or more instances to add or remove.
   b) To add or remove an implementation type, click Edit Implementation Types > Add Implementation Type(s) or Edit Implementation Types > Remove Implementation Type(s) and select 1 or more types to add or remove.
   c) Click Save and Continue.

      Workday updates the Advanced configuration package with your changes.
8. On the Review and Prepare for Migration page, complete validation checks:
   a) Click Run Blank Reference IDs to list instances with a missing reference ID.

      Click View and Fix Errors to automatically populate the blank reference IDs. Workday assigns no reference IDs to some instances and therefore doesn't report them in this validation check.
   b) Click Run System Generated Ref IDs to list instances with auto generated numeric sequences for reference IDs.

      While these aren't incorrect, they may cause overwrite issues when you migrate to a tenant that has the same system generated reference ID for another instance that isn't a match. Change these reference IDs only if you are concerned that migration may:

      - Overwrite an instance in the target tenant unintentionally.
      - Create an instance in the target tenant instead of modifying one.
   c) Click Run Exception Audits to run these audit reports on the instances on your package:

      - Business Process Exception
      - Security Exception
      - Calculation Exception
      - Calculated Field Exception
      - Integration Exception
      - Custom Report Exception
      - Benefits Condition Rule Exception
      - Condition Rule Exception
      - Organization Exception
      - Organization Type Exception
      - Position Group Exception
      - Report Specific Calculated Field Exception
      - Worklet Mappings Exception
      - Payroll Exception
   d) Click Prepare for Migration.

      Workday redirects you to Customer Central.
9. Click Launch Object Transporter in Customer Central to sign into the Customer Central tenant and Object Transporter workflow as a Customer Central administrator or user.
10. On the Migrate with Object Transporter page, select the Target Tenant .

    Select the Include Translations? checkbox to include translated attribute values for instances in your package that contain them.

    Because you're migrating an Advanced configuration package from a Configuration Change Tracker report, Workday lists Dependency Support for the package as manual. This means that Object Transporter doesn't automatically add dependencies to your package after migration starts, as it does with standard configuration packages. You can manually add dependent instances to resolve missing ones if Object Transporter later reports them in the Pre-Migration Diff report. Advanced configuration packages don't usually have missing or mismatched dependent instances, however, unless instances in the package have been updated or incorrectly configured since you created the package.

11. Click OK.
12. On the Pre-Migration Status page, click Refresh or wait for Workday to complete the premigration check of the configuration data in scope for migration.

    Some instances have prerequisites that must exist in the target tenant for migration to succeed. Example: A calculated field. When Workday:

    - Finds missing prerequisites, it generates a Pre-Migration Check report.
    - Finds no missing prerequisites, it skips the Pre-Migration Check report and generates a View Pre-Migration Diff report.
13. Resolve any missing migration prerequisites that the premigration check finds in the target tenant:
    a) Click View Pre-Migration Check Report.
    b) Follow the guidelines on the Object Transporter Pre-Migration Check page.

       In the Errors table, Workday lists source instances that are prerequisites for migration. Workday flags a prerequisite as missing when it has:

       - No corresponding instances on the target tenant.
       - A missing or mismatched Reference ID.
    c) To resolve a prerequisite, sign in to the target tenant and create the missing instance or resolve its Reference ID.

       Note: You need the Reference ID of a compatible instance to map to it.

       You can also use Tailored Loading to map source instances that have no corresponding target instances to other compatible instances on the target tenant.
14. Use Tailored Loading to map any unmatched source instances to compatible instances on the target tenant:
    a) In the Errors table, click Map Instance for the missing prerequisite to resolve.
    b) Enter the Reference ID of a compatible instance on the target tenant.
    c) Click Search.
    d) In the table of results, select the check box for the compatible instance. When the table lists multiple instances, select the one that is:

       - The same implementation type.
       - The most compatible with the source tenant instance.
    e) Click Apply Mapping.

       To view information on the compatible instance, click the link for it in the Mapping to column.

       To remove a mapping, click Remove and follow the workflow to apply a new mapping.
    f) Click Rescan Target.

       When you’ve resolved all the missing prerequisites in the Errors table, Workday displays the Diff Report page to continue the migration.

15. If you're migrating any instances with effective dates, click Set Effective Date Strategy.
    a) On the Set Date for Package prompt, first select a strategy for all instances in the migration.

       You can apply a default effective date of 01/01/1900 or manually select a date. If you're migrating a single instance, any dependencies of the instance inherit the date you select here.

       If an instance without an effective date has dependencies with effective dates, the dependencies inherit the date of migration as their effective date during the migration process.

       You can always change effective dates after migration. You can also further refine your effective date strategy by selecting different dates for instances and dependencies individually, or as a group, by implementation type.
    b) To apply different effective dates at the implementation type or instance level, click Save and Continue Editing.
    c) To select a different effective date for all instances of an implementation type, select a date in the Set Effective Date By Implementation Type column.

       To change the year, enter it directly in the field.
    d) To change the effective date of 1 or more unique instances or dependencies, click Set Effective Date by Instance.
    e) Select a new effective date for an instance in the Set Effective Date by Instance column.

       Workday displays both instances and their dependencies as separate rows in the table. To change the year for an instance or dependent instance, enter the year directly in the field.
16. (Optional) If your package contains domain or business process security policies that differ from the corresponding policies on the target tenant, click Edit Migration Behavior and select a migration behavior for all or some of the modified security policies. Workday merges security policies by default unless you use this option to override security policies on the target tenant.

    Note: Workday only enables this option when it detects 1 or more modified security policies.

Option	Description
Merge (Recommended)	Default behavior. Combines permission-holding components such as security groups and roles from all modified source security policies with those in the corresponding target security policies. Merges are additive. Workday removes nothing, making it the safest option. Consider this option when you need to: • Prioritize target tenant integrity. • Migrate routine updates from a preview, sandbox, or development environments to production, where the goal is to introduce new configurations without disturbing existing ones. • Mitigate the risk of inadvertently removing permissions or security groups that are critical for target tenant operation. • Protect target-specific changes. Because Merge is non destructive by default, it reduces time spent on checking for potential overwrites, enabling you to focus more on verifying the additions.
Override	Replaces all security policies on the target tenant with the corresponding modified

Option	Description
	ones on the source tenant. When replacing, Workday discards the previous corresponding policies on the target tenant and implements only the modified security policies from the source tenant. Consider this option when you need to: • Treat the source tenant as the authoritative source for security policies. • Perform initial deployments or tenant refreshes. • Intentionally replace target security policies fully. • Ensure absolute consistency with the source. Note: When you migrate a single instance, Workday replaces only the corresponding instance on the target tenant.
Manual Selection	Provides the most granular control, enabling you to review each modified security policy in the package individually. In the Migration Behavior per Instance column, select Merge or Override for each modified security policy. Consider this option when you need to: • Handle complex migrations with diverse policy-specific needs. • Address mixed requirements in a single package where different policies need different merge or override behavior applied to them. • Operate in sensitive environments that demand meticulous control over each policy. • Manage phased rollouts or policies handled by different teams. • Achieve maximum precision and flexibility, tailoring action to each policy.

17. (Optional) To view the attributes for a modified instance, click View Attribute Diff to examine the individual attributes in the modified dependency object.

    On the Attribute Diff page, Workday provides a status icon for each attribute of a Modified instance. The following table describes how Workday categorizes the differences between source and target attributes:

Attribute Status	Description
Change	Source and target attributes exist but aren't identical. Migration overwrites the target attribute with the source attribute. If a source attribute belongs to a security policy instance, Workday adds it to the target tenant, unless you've

Attribute Status	Description
	selected the Override option when you edited migration behavior for security policies.
New	No attribute exists on the target tenant. Workday adds the source attribute to the target tenant.
Not Matching	Source and target attributes have different translation values. Workday merges the target translation value with the source translation value. Example: The source attribute has a Polish translation value and the target attribute has an English translation value. Migration adds the Polish translation value to the target attribute without changing the English value.
Removal	Attribute exists in target tenant but not in source. Migration removes the target attribute. Workday doesn't assign Removal status to attributes that are part of domain or business process security policies.

18. When you've reviewed and understand the changes that migration will make to your target tenant, click Proceed with Migration to view a final summary of the instances to migrate.
19. Click Start Migration.
20. When the migration completes, click View Post Migration Report to see a summary of the changes in the target tenant.

    Postmigration summary reports remain available for 2 years.
21. (Optional) On the Post-Migration Report page, click Run Tenant Compare to compare instances of implementation types between 2 tenants.

    You can save the comparisons as Tenant Compare reports.

Configuration Extracts
Steps: Create Configuration Extracts

Prerequisites

To use Customer Central:

- Steps: Set Up Customer Central Accounts on page 763.
- Steps: Set Up Customer Central Tenant Access on page 773.

To create configuration extracts: Permissions granted by the Customer Central security administrator on the Maintain Access to Customer Central Tooling task.

Context

You can create an extract of a Configuration Package or Security Configuration Package from a Sandbox or Implementation tenant and download it locally for reuse later. Create an extract when:

- You want to reuse the same tenant configuration multiple times across different tenants.
- You want to migrate a configuration to a tenant with a different billing ID.
- You want to save your current tenant configuration before a tenant refresh and then upload it to the same tenant after the refresh.

Steps

1. Create Configuration Packages for Object Transporter on page 785.

   You can skip this step if the Configuration Package that you want to use for your extract is already in the Implementation or Sandbox tenant.
2. Sign in to Customer Central as a Customer Central User or Administrator.
3. Access the Create Configuration Extract task.

   If you haven't already created a Configuration Package, you can do so in the task before creating an extract.
4. Select the web service version to use for extracting the configuration.
5. Select the source tenant. Example: An Implementation or Sandbox tenant.
6. Select the type of Configuration Package you want to extract.

   If you want to migrate an extract of a Security Configuration Package, the Customer Central Security Administrator must assign you access to do so.
7. From the resulting table, select the Configuration Package to extract.

   Workday creates an extract file of the type .dat from the Configuration Package.
8. From Extraction Reports, click the link for your extract to download it locally.

Result

Workday encyrpts the extract file during creation. You can't modify it. If necessary, recreate the Configuration Package with the modifications you need, and then extract it again.

Example

Next Steps

When ready, you can upload the extract file to:

- The same tenant.
- A different tenant.

  See Migrate Configuration Extracts on page 822.

Migrate Configuration Extracts

Prerequisites

- Configure access and security for Customer Central and Object Transporter:

  See Steps: Configure Access to Customer Central and Object Transporter.
- Ensure you have permissions to migrate configuration extracts.

  See Manage Access to Customer Central Implementation Tools on page 750

Context

You can migrate a configuration extract that you've saved locally, even if the target tenant has a different billing ID than the source tenant where you extracted the file. After you upload the file to Customer Central and select a target tenant using the Migrate Configuration Extract task, Workday compares the instances in the extract file with the corresponding instances on the target tenant and launches a series of checks to report issues that require resolution before migration can succeed.

See Concept: Object Transporter Migration Workflow.

When Workday completes the migration, you can view the Post Migration report, or create a Tenant Compare report to compare the differences between tenants after migration.

Steps

1. Using your Customer Central administrator or user account, sign in to a Customer Central tenant that has access to the target tenant to which you want to migrate the configuration extract.
2. Access the Migrate Configuration Extract task.
3. Upload the extract file to the Customer Central tenant.

   Workday scans the .dat file for viruses.
4. Select the target tenant.
5. Click OK to proceed with migration preparation.
6. On the Pre-Migration Status page, click Refresh or wait for Workday to complete the premigration check of the configuration data in scope for migration.

   Some instances have prerequisites that must exist in the target tenant for migration to succeed. Example: A calculated field. When Workday:

   - Finds missing prerequisites, it generates a Pre-Migration Check report.
   - Finds no missing prerequisites, it skips the Pre-Migration Check report and generates a View Pre-Migration Diff report.
7. Resolve any missing migration prerequisites that the premigration check finds in the target tenant:
   a) Click View Pre-Migration Check Report.
   b) Follow the guidelines on the Object Transporter Pre-Migration Check page.

      In the Errors table, Workday lists source instances that are prerequisites for migration. Workday flags a prerequisite as missing when it has:

      - No corresponding instances on the target tenant.
      - A missing or mismatched Reference ID.
   c) To resolve a prerequisite, sign in to the target tenant and create the missing instance or resolve its Reference ID.

      Note: You need the Reference ID of a compatible instance to map to it.

      You can also use Tailored Loading to map source instances that have no corresponding target instances to other compatible instances on the target tenant.
8. Use Tailored Loading to map any unmatched source instances to compatible instances on the target tenant:
   a) In the Errors table, click Map Instance for the missing prerequisite to resolve.
   b) Enter the Reference ID of a compatible instance on the target tenant.
   c) Click Search.
   d) In the table of results, select the check box for the compatible instance. When the table lists multiple instances, select the one that is:

      - The same implementation type.
      - The most compatible with the source tenant instance.
   e) Click Apply Mapping.

      To view information on the compatible instance, click the link for it in the Mapping to column.

      To remove a mapping, click Remove and follow the workflow to apply a new mapping.
   f) Click Rescan Target.

      When you’ve resolved all the missing prerequisites in the Errors table, Workday displays the Diff Report page to continue the migration.

9. If the extract contains instances with effective dates, click Set Effective Date Strategy.
    a) On the Set Date for Package prompt, first select a strategy for all instances in the migration.

       You can apply a default effective date of 01/01/1900 or manually select a date. If you're migrating a single instance, any dependencies of the instance inherit the date you select here.

       If an instance without an effective date has dependencies with effective dates, the dependencies inherit the date of migration as their effective date during the migration process.

       You can always change effective dates after migration. You can also further refine your effective date strategy by selecting different dates for instances and dependencies individually, or as a group, by implementation type.
    b) To apply different effective dates at the implementation type or instance level, click Save and Continue Editing.
    c) To select a different effective date for all instances of an implementation type, select a date in the Set Effective Date By Implementation Type column.

       To change the year, enter it directly in the field.
    d) To change the effective date of 1 or more unique instances or dependencies, click Set Effective Date by Instance.
    e) Select a new effective date for an instance in the Set Effective Date by Instance column.

       Workday displays both instances and their dependencies as separate rows in the table. To change the year for an instance or dependent instance, enter the year directly in the field.
10. (Optional) If the extract contains domain or business process security policies that differ from the corresponding policies on the target tenant, click Edit Migration Behavior and select a migration behavior for all or some of the modified security policies.

    Note: Workday only enables this option when it detects 1 or more modified security policies.

Option	Description
Merge (Recommended)	Default behavior. Combines permission-holding components such as security groups and roles from all modified source security policies with those in the corresponding target security policies. Merges are additive. Workday removes nothing, making it the safest option. Consider this option when you need to: • Prioritize target tenant integrity. • Migrate routine updates from a preview, sandbox, or development environments to production, where the goal is to introduce new configurations without disturbing existing ones. • Mitigate the risk of inadvertently removing permissions or security groups that are critical for target tenant operation. • Protect target-specific changes. Because Merge is non destructive by default, it reduces time spent on checking for potential overwrites, enabling you to focus more on verifying the additions.
Override	Replaces all security policies on the target tenant with the corresponding modified ones on the source tenant. When replacing,

Option	Description
	Workday discards the previous corresponding policies on the target tenant and implements only the modified security policies from the source tenant. Consider this option when you need to: • Treat the source tenant as the authoritative source for security policies. • Perform initial deployments or tenant refreshes. • Intentionally replace target security policies fully. • Ensure absolute consistency with the source. Note: When you migrate a single instance, Workday replaces only the corresponding instance on the target tenant.
Manual Selection	Provides the most granular control, enabling you to review each modified security policy in the package individually. In the Migration Behavior per Instance column, select Merge or Override for each modified security policy. Consider this option when you need to: • Handle complex migrations with diverse policy-specific needs. • Address mixed requirements in a single package where different policies need different merge or override behavior applied to them. • Operate in sensitive environments that demand meticulous control over each policy. • Manage phased rollouts or policies handled by different teams. • Achieve maximum precision and flexibility, tailoring action to each policy.

11. Click Refresh or wait for Workday to display View Diff Report and click it.

    The Pre-Migration Diff Report page displays all instances in scope for migration, grouped by the implementation type of the top-level instance, and organized by migration behavior these tabs:

Tab	Description
All Instances	Lists all instances that your configuration package, or configuration extract contains. When you migrate a single instance, the tab displays 1 top level instance and any dependent objects it may contain.
Modified Status icon: Orange	Lists instances that exist in both the source and target tenants but differ because of a previous modification. During migration, Workday overwrites the target instance with

Tab	Description
	the source instance unless it is a security policy. By default, Workday merges security policies from a source tenant with the corresponding security policy on the target tenant. You can change default behavior for security policy migration by using the Edit Migration Behavior option to overwrite the tenant security policy.
New Status icon: Blue	Lists instances that don't yet exist exist in the target tenant. During migration, Workday adds the instance from the source tenant to the target tenant.
No Change Status icon: Gray	Lists instances that are identical in the source and target tenants. No migration is necessary.
Excluded	Lists top-level instances that you've excluded from the migration. If you haven't excluded anything, Workday doesn't display this tab.

You can select a tab to filter by migration behavior. On the tab, you can expand an implementation type to review the top-level instances in scope for migration. The same inplementation type can appear on multiple tabs, but the instances listed under it only relate to a particular migration behavior. Example: You select the Modified tab and see the same implementation type that you saw on the New tab. You expand the implementation type and see a unique set of of top-level instances from the instances on the New tab. The Modified tab lists instances with differences between the source and target instances. The New tab lists instances that don't yet exist on the target tenant.

The number beside the Modified status indicates the total number of top-level modified instances in scope for migrtation. The number beside the New status indicates the total number of top-level instances that Workday will add to the target tenant.

Note: Pre-Migration Diff reports for migrations that don't proceed remain available for 30 days

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12. (Optional) Review the dependencies of the new or modified instance or instances:
    a) Navigate to the Modified or New tab and expand the implementation type.
    b) In the Dependencies column of the table, click View Dependencies for the instance with dependencies you want to review.

       Workday recommends that you examine the dependent objects in new or modified instances.

       Like top-level instances, Workday provides a status icon for each dependent instance: Modified, New, or No Change.

       Note: When Workday encounters a circular dependency, it stops loading any more dependencies for the instance. Workday migrates circular dependencies. To prevent repetitive reporting of the same dependency, it only displays the first occurrence of the dependency and flags it with a circular dependency icon.

13. (Optional) To view the attributes for a modified instance, click View Attribute Diff to examine the individual attributes in the modified dependency object.

    On the Attribute Diff page, Workday provides a status icon for each attribute of a Modified instance. The following table describes how Workday categorizes the differences between source and target attributes:

Attribute Status	Description
Change	Source and target attributes exist but aren't identical. Migration overwrites the target attribute with the source attribute. If a source attribute belongs to a security policy instance, Workday adds it to the target tenant, unless you've selected the Override option when you edited migration behavior for security policies.
New	No attribute exists on the target tenant. Workday adds the source attribute to the target tenant.
Not Matching	Source and target attributes have different translation values. Workday merges the target translation value with the source translation value. Example: The source attribute has a Polish translation value and the target attribute has an English translation value. Migration adds the Polish translation value to the target attribute without changing the English value.
Removal	Attribute exists in target tenant but not in source. Migration removes the target attribute. Workday doesn't assign Removal status to attributes that are part of domain or business process security policies.

14. (Optional) When the migration contains Modified instances, click Manage Modified Instances on the Dependencies Diff page to exclude a modified instance or one of its dependencies from migration.
    a) In the Instances to Migrate table, clear the check box for the instance that you want to exclude. Excluding a top-level instance also excludes its dependencies from migration.
    b) (Optional) In the Dependencies column, click View to view the dependencies of an instance again.
    c) Click Save Changes and confirm that you want to save your selection. Once saved, you can't undo the exclusion. To undo the exclusion, start a new migration.

    On the Dependencies Diff page, Workday displays the instance as excluded in the table of instances. When you exclude a top-level instance, Workday reports the top-level instance as Excluded and its dependencies as Excluded by Parent. Workday doesn't exclude dependencies that are also dependencies of another implementation type if that implementation type is part of the same migration.

    You can also verify the excluded instance on the Excluded tab on the Pre-Migration Diff Report page.
15. When you've reviewed and understand the changes that migration will make to your target tenant, click Proceed with Migration to view a final summary of the instances to migrate.
16. Click Start Migration.

17. When the migration completes, click View Post Migration Report to see a summary of the changes in the target tenant.

    Postmigration summary reports remain available for 2 years.
18. (Optional) On the Post-Migration Report page, click Run Tenant Compare to compare instances of implementation types between 2 tenants.

    You can save the comparisons as Tenant Compare reports.

Result

When migration is successful, Workday makes the decrypted extract contents available in the target tenant.

Related Information
Tasks
Manage Access to Customer Central Implementation Tools on page 750

Tenant Compare
Steps: Set Up Tenant Compare Security and Access

Prerequisites

- Create Customer Central Security Administrator Accounts on page 764.
- Create Customer Central Administrator Accounts on page 765.
- Set up Customer Central tenant access.

  See Steps: Set Up Customer Central Tenant Access on page 773.

Context

You can enable users to compare tenant configuration data through Customer Central.

Steps

1. Configure Tenant Compare Security on page 829.
2. Create Customer Central User Accounts on page 766.

   Create an account for each user who needs to compare configuration data using Tenant Compare.
3. (Optional)Set Up Customer Central Production Access on page 775.

   If users need to compare configuration data on a Production tenant, enable Customer Central to access that tenant.
4. (Optional) Create Customer Central Sessions on page 776.

   To enable users to migrate configuration data to a Production tenant, create a Production tenant session for them.
5. Provide Tenant Access to Customer Central Users on page 774.

   Sign on to Customer Central as a Customer Central administrator and provide users access to the non-Production tenants on which they need to compare configuration data through Customer Central.
6. Sign on to Customer Central as the Customer Central security administrator.
   a) Access the Maintain Access to Customer Central Tooling task.
   b) For each user or administrator to whom you're granting access to the Tenant Compare task, jselect the Create & View Tenant Compare Reports check box.
   c) Click OK.

Related Information
Concepts
Concept: Tenant Compare Report on page 831

Configure Tenant Compare Security

Prerequisites

- Create Customer Central Security Administrator Accounts on page 764
- Create Customer Central Administrator Accounts on page 765
- Security: *Security Configuration* domain in the System functional area.

Context

You can create a security group for users on each tenant where users plan to compare configuration data. Granting security permissions to users in the Customer Central tenant enables them to access these tasks and reports.:

- Create Tenant Compare Report
- View Tenant Compare Report
- View All Tenant Compare Reports

Steps

1. Sign on to the tenant as a security administrator.
2. Access the Create Security Group task.

   Create a user-based security group for Tenant Compare users.
3. Access the Maintain Permissions for Security Group task.

   Assign the security group these domain security permissions:

Domain	Permissions
Configuration Change Management	View and Modify
Special OX Web Services	Get
4. Activate Pending Security Policy Changes.

Compare Tenant Configuration Data

Prerequisites

Set up security for and access to the Tenant Compare implemenation tool. See Steps: Set Up Tenant Compare Security and Access on page 828.

Context

You can compare instances of implementation types between 2 tenants and save the comparisons as Tenant Compare reports. You can select a specific implementation type or select from a broader range such as tenant-wide or a particular implementation type or area.

The Create Tenant Compare Report task identifies matching instances between tenants for each implementation type you select. By default, it checks both the Reference IDs and the attributes of each instance to determine a match.

When you access the report from Customer Central, you select a source and target tenant to compare from among the tenants you have configured for access to Customer Central. Workday also makes a Run Tenant Compare button available in the report, enabling you access the Create Tenant Compare Report task from:

- The Object Transporter Post-Migration Report page as you complete a migration.
- The Object Transporter Migration Reports (OX) report in Customer Central.

Steps

1. Sign in to the Customer Central tenant using your Customer Central account.

   If you're finishing a migration in the Object Transporter workflow, you're already logged in to Customer Central.
2. Access the Create Tenant Compare Report task.

   I f you're finishing a migration in the Object Transporter workflow, click Run Tenant Compare on the Post-Migration Report page.
3. (Optional) Edit the report name.

   Select this name later to view the report.
4. Select a source and target tenant.

   Workday lists tenants that are configured to access Customer Central.
5. To assess matches using only Reference IDs, clear the Generate Full Comparison check box in the report.
6. (Optional) To filter information from inclusion in the report, select tags on the XML Tags to Exclude prompt.

   You can exclude these tags:

   - *WID*
   - *Effective_Date*
   - *Usage*
   - *Last_Modified*

   When you exclude a *WID* tag, Workday excludes Workday IDs and these ID types:

   - WD-I
   - WD-ID
   - WD-WID
7. Select 1 or more implementation types or groupings of implementation types:

Option	Description
Entire Tenant	Displays all migratable implementation types from source and target tenants. You can't change your selection.
By Implementation Area(s)	Select 1 or more of the migratable implementation types from source and target tenants by product area.
By Implementation Type(s)	Select 1 or more of the migratable implementation types from the source and target tenants. Each implementation type contains instances that are the same type of object. Example: The Business Process Definitions implementation type contains only instances that are objects of business process definition type.

8. Click OK to run the report.
9. Click Refresh as necessary to update report progress until it completes.

   Workday saves your report and displays it in a table that lists count totals for migratable instances, including matched and unmatched instances.
10. Review the report to determine the differences between instances in the source and target tenants.

    You can drill down on counts to display more information on differences.

11. (Optional) On the Matched with Attribute Diff tab, view a summary of instances that have dependencies with attribute differences between source and target tenants.

    Workday displays the total number of dependencies with differences between source and target tenants.

    a) Click View Attribute Differences in an instance row to display a comparison of source and target tenant attributes.

       Click Refresh as necessary to populate the view.
    b) Click an instance in the navigation pane to display contrasting values for the dependencies of that instance.
    c) To view the value differences in XML code, click View XML Payload.
    d) Close the browser tab when done.
12. Click Done to exit the View Tenant Compare Report.

Result

Workday saves the report on Customer Central for later use. There's no retention limit for Tenant Compare reports.

Next Steps

For a complete list of saved reports, access the View All Tenant Compare Reports report.

Related Information
Reference
Reference: Unavailable Implementation Types in Tenant Comparisons on page 832

Concept: Tenant Compare Report

Use these tips to get better results on Tenant Compare reports and to better understand how the report analyzes and presents configuration data differences.

Instances with Unmatched Reference IDs

Displays a count of instances that reside solely in 1 tenant. To view the differences for each instance, drill down on the count.

To display how values for the dependencies of an instance differ, click View Attribute Differences for the instance.

To filter on only instances with attribute differences, switch to the Matched with Attribute Diff tab.

Matching Instances with Attribute Differences

Displays instances that have the same reference ID but different configurations between the source and target tenants.

Zero Counts

The Tenant Compare report might display zero counts for these reasons:

- There are no instances in either tenant to compare.
- The implementation type of the instance doesn't support reference IDs. Tenant Compare uses reference IDs to compare instances.
- The instance has a missing reference ID. When the implementation type for the instance supports reference IDs, Tenant Compare lists the count in one of the Instances with No Reference ID columns.
- The progress bars are not yet at 100%. Click Refresh as necessary until progress is complete.

Comparing Domain Security Policies

When you select *Domain Security Policies* as the implementation type to compare, the Tenant Compare task compares:

- Suspended domain instances.

  You can view the disable flag for the instance when you click View Attribute Differences for the instance. When you disable a functional area, Workday suspends any domains in that functional area.
- Subdomains.

  If the task finds matching parent domains, you can view any contrasting values for subdomains when you click View Attribute Differences for the parent domain instance.

Related Information

Tasks

Steps: Set Up Tenant Compare Security and Access on page 828

Reference: Unavailable Implementation Types in Tenant Comparisons

Workday doesn't display these implementation types in the Tenant Compare report except as indicated for implementers.

Implementation Type Area	Implementation Type	Implementer Compare Only
Financial Aid	Financial Aid Disbursement Job Processes	X
Accounting Center	Accounting Center Process Configurations	X
Accounting Center	Accounting Center Process Configurations	X
Campus Engagement	Student Engagement Plans	X
Campus Engagement	Student Messages	X
Journeys	Configurations	
Help	Case Notification Recipients	
Customer Setup	Customer Invoice Layout Rules	
Setup Data	Spend Transaction Instructions	
Financial Accounting Setup	Year-End Closing Rules	

Note: When comparing unavailable implementation types or their reference IDs, Workday might display zero counts or error messages on the report.

Organizations

Setup Considerations: Organizations

You can use this topic to help make decisions when planning your configuration and use of organizations. It explains:

- Why to set it up.

- How this feature fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Organizations are groups of resources, workers, costs, and other organizations for business process routing, security, analysis, and reporting. Along with roles and hierarchies, organizations are part of the foundation that provides configurable and contextual security within Workday. The way that you configure your organizations influences everything from your staffing models and role assignments to your physical locations and reporting.

Common organization types include:

- Company.
- Cost Centers.
- Custom Organizations.
- Location Hierarchies.
- Matrix.
- Pay Group.
- Regions.
- Supervisory. (Similar to departments in other products.)

Business Benefits

Organizations are a required Workday feature that helps you:

- Analyze your business needs and structure. Examples:
  - Organize logical worker groupings and business processes that reflect different reporting structures.
  - Set up operations based on business units, regions, and cost centers.
  - Build flexibility into individual organizations so that managers can operate their organizations according to business needs.
  - Set up organization charts to reflect divisions of work and management structure.
  - Assign staffing models to establish how you define and fill jobs and positions.
- Report on and track progress. Examples:
  - Organization history for accreditation, compliance, and regulatory purposes.
  - Identify eligibility for pay, benefits, compensation, and time off.
  - Configure organization charts to include metrics so that you can monitor business performance.
  - Make decisions about division of work based on organizational reporting that tracks data such as staffing, compliance, and accreditation.
- Set up automated processes. Examples:
  - Configure separate business processes for individual organizations and organization types.
  - Set up automated processes to assign workers to their management and support teams.
  - Aggregate data for reports.

Use Cases

Product	Example Use Case
Business Processes	Managers can customize business processes according to organization and organization types. Examples: By superior organization, company, recruiting, or pay group.
HCM	HR administrators can assign other human resources administrators to support groups of workers according to different organization types. Examples: Location hierarchy, supervisory organization, or department.
Organizations	Managers can: • Use reorganizations to change their organization structure over time. Examples: Create subordinate, assign superior, inactivate organization, divide organization, and move workers. • Configure custom organizations to align with unique practices of your industry or the specific way that you run your business. Examples: Stores and districts.
Reporting	Managers can: • Define reporting relationships that represent the structure on an organization chart. • Set up matrix organizations that they can use to link workers who work together but belong to different supervisory organizations.
Security	• Security administrators can provide precise contextual security for role assignees and members. • Administrators can create location hierarchies, which enable you to configure security and view reports from an aggregated location perspective.
Student	Administrators can: • Create academic units in university settings for academic appointments, academic affiliates, and professorships. • Set up grants as a costing organization to manage award activities and report on awards.

Questions to Consider

Questions	Considerations
What Workday products or functions are you planning to use?	The structure and purpose of your enterprise determine the organization types that you set up. Decide how granular your organization structure

Questions	Considerations
	and security will be according to industry, region, and regulatory requirements.
What do you want to report on?	Workday provides reports that enable you to view summary or detailed data about organizations for administrators and end users. They way you structure organizations affects reporting. Organizations represent dimensions that you can report on and determine the level of detail. Workday organizations are mutually exclusive, which provides built-in flexibility for your organization structure.
How will you assign organizations to workers?	Consult with stakeholders to determine if you'll: • Manually assign organizations to each worker. • Assign organizations as part of a staffing event process like hiring or job changes. You can also set up some organization types based on rules. Example: Custom organizations.
What organization security do you require?	Carefully consider the level of granularity for security. If security isn't restrictive enough, too many people can have unintentional access to sensitive data. But if security is too restrictive, it can be difficult to maintain. Determine who can: • View organizations and members. • Create and modify organizations. • Modify organization structures and hierarchies. Example: Business processes route approvals to specific roles based on organization and where a role fits into an organization hierarchy.
Do your organizations span multiple time zones?	When you set up your tenant, consider who is supporting which groups of workers and the time zones for your organizations. This ensures that effective dates for business processes, role assignments, and pay are processed as expected.
How will you assign roles to each organization?	Consider role-based security and how roles function within organizations. Example: If human resources personnel support workers in a region or location, they should be assigned to a location. But if human resources personnel support a business unit, they should be assigned to supervisory organizations.
How will you use organizations and how will they be structured?	Determine if you'll require specialized program categories. Examples: • Public sector and higher education categories like fund, gift, and grant.

Questions	Considerations
	• Location categories like regions and territories. • Business unit categories like product lines and custom categories. The organization type determines the functionality that is included. These organization type examples include certain features automatically: • Company includes bank accounts and fiscal schedules. • Location includes addresses and regions. • Pay group includes pay schedules and payroll. When no Workday organization type fits your organization, you can create custom organizations.
What organization structure do you require?	Workday supports many organization structures. Examples: • Decentralized • Hierarchical • Matrix
Do you need custom organizations?	Determine if you need to group workers for an enterprise-specific purpose that isn't served by a Workday-delivered organization type. Example: Store, which has roles, and store regions, which would also have roles assigned, so you can set up inheritance. Custom organizations can be rolled up by more than 1 custom organization type that supports hierarchy.
Can you use custom organization as a custom worktag?	Yes. You can use custom organization as a custom worktag in Financial Management and Payroll. There’s no limit to the number of custom organizations that you can create. However, there's a limit to the number of custom organizations that you can designate as a custom worktag. You can only use 10 custom organizations as custom worktags, and is important when implementing HCM or Payroll without Financial Management that you consider this limit.

Recommendations

- Design your organizations so that they work with other functional areas like payroll, human resources, and finance.
- Involve stakeholders from all business entities within your organization.
- Involve your security, system, and business process administrators to ensure that you meet all requirements related to approvals, business process routing, and data access.

- Consider the granularity and aggregation of your reporting as you design your organization structure because organizations play an essential role in reporting.
- Carefully assess organization hierarchies. Creating large number of custom or nested hierarchies or using them in eligibility rules impacts performance.

Requirements

You must:

- Set up supervisory organizations because all workers must be assigned to a supervisory organization, which are subordinates of their managers' organizations. Managers aren’t members of the supervisory organization that contain their direct reports.
- Select a staffing model, either position management or job management, for supervisory organizations.

Limitations

A supervisory organization can only have 1 staffing model. Not all supervisory organizations require the same staffing model, but you can only move workers between organizations that use the same staffing models.

You can assign individual workers to several organizations, including several organizations of the same type.

Tenant Setup

Access the Edit Tenant Setup - System task to configure:

- Default time zone and other time-zone options.
- Organization hierarchies that the processing user can view.

Security

Some organization types are secured by separate domains for creating, managing, and viewing organization types. You must set up at least one of these domains in the Organizations and Roles functional area:

Domain	Considerations
Create: Supervisory Organization	Enables you to maintain and view: • Organization types and subtypes. • Business site usages. • Time profiles Provides global access to organizations, enabling you to: • Correct organization exceptions. • Define membership rules. • View organization audits and reports.
Manage: Membership Rule Create	Enables you to create membership rules.
Manage: Membership Rule Edit	Enables you to edit and view membership rules. Enables self-service users to access membership rules that they create.
Set Up: Organization	Enables you to maintain and view: • Organization types and subtypes.

Domain	Considerations
	• Business site usages. • Time profiles Provides global access to organizations, enabling you to: • Correct organization exceptions. • Define membership rules. • View organization audits and reports.

Business Processes

Business processes for organizations are divided between these categories:

- Creating or updating organization status or structure. Examples:
  - *Activation*
  - *Assign Superior*
  - *Assign Included Organizations*
  - *Create Subordinate*
  - Divide Organization
- Assigning and removing organizations to positions or workers. Examples:
  - *Assign Matrix Organization*
  - *Assign Multiple Matrix Members*
  - *Assign Pay Group*
  - *Change Organization Assignments*
  - *Create Position*
  - *Move Workers*
  - *Remove From Matrix Organization*
  - *Remove Multiple Matrix Members*

Reporting

Organizations have different structures and usages within each Workday product and function. Examples: Human Capital Management, Payroll, Recruiting, and Student have unique reporting options.

You can use these reports to view summary or detailed data about existing organizations:

Report	Description
Organization Summary	Displays a list of all organizations filtered by selected organization types, with summary information. To display the organization chart for any organization that you have permissions to view, click the related actions menu for that Organization, and then click Org Chart.
Organizations I Belong To	Displays a list of all organizations that you are a member of.
My Self-Assign Roles	Displays a list of all organizations for which your position is assigned to a role indicated as Self-Assign in Maintain Assignable Roles.
My Leadership Roles report or worklet	Displays a list of all organizations for which your position is assigned to a role indicated as Is Leadership in Maintain Assignable Roles

Report	Description
My Supporting Roles	Displays a list of all organizations for which your position is assigned to a role indicated as Is Supporting in Maintain Assignable Roles.

You can use these reports to manage and track organizations:

Report	Description
Maintain Organization Types	Enables you to manage and configure various types of organizations, such as companies, cost centers, regions, and more.
View Members As Of	Displays members of an organization on any given historical or future date, considering the effective dates of workers' assignments.
View Organization As Of	Displays the state of an organization at a specific point in time. This report enables you to understand the structure, staffing, and other key attributes of an organization as they were on a particular date.
View Organization Chart As Of	Displays an organization's structure, including reporting relationships and hierarchy, as of a specific date.
View Organization Members	Displays members of an organization that are assigned by a membership rule to a custom organization. This report uses the All Positions data source.
View Supervisory Organization	Displays the workers, staffing information, organization roles, and security groups. This report enables you to find and access related actions on workers, roles, unfilled positions, and more.
Organization Assignment Exception Audit	Displays a list of invalid organization assignments for a position restriction based on allowed values of its supervisory organization or the location hierarchy (or hierarchies) in which its location is included.
Organization Exception Audit	Displays organizations for which there are errors or warnings. This report displays the business object that has the problem and a description of the problem or solution.
Organization Type Exception Audit	Displays organization types for which there are errors or warnings. This report displays the organization type, such as supervisory organization or company, that has the problem and a description of the problem or solution.

To view a complete list of Workday reports with descriptions, you can run the All Workday Delivered and Custom Reports task.

Integrations

When you want to access organizations with visibility restrictions using an integration, you need to:

- Provide the integration system user (ISU) account that you're using with Get and Put access to the domains that secure those organizations.
- Link the ISU to an Create Integration System Security Groups.
- Provide the ISSG with Get and Put access to the domains that secure the organization web services the ISU is trying to run.

Connections and Touchpoints

Organizations interact with nearly every Workday feature.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community. The Touchpoints Kit helps you anticipate how any organization type interacts across Workday including HCM, Finance, Payroll, and Student.

Other Impacts
No impact.
Related Information
Concepts

Concept: Business Processes and Organizations on page 947

Concept: Staffing Models

Tasks

Amend Position Budgets for Organizations

Assign Multiple Managers to Supervisory Organizations

Create External Payroll Organization Type

Create or Edit Organization Goals

Create Organization Membership Security Groups

Steps: Grant Integration or External Endpoint Access to Workday

Steps: Report on Time Across Supervisory Organizations

Steps: View Talent Across Organizations

Set Up Supervisory Organizations

Prerequisites

Security: *Create: Supervisory Organization* domain in the Organizations and Roles functional area.

Context

You can use supervisory organizations to manage the reporting structure within your company. When you create a supervisory organization, you can assign roles to it. Roles and role-based security groups determine access to information about that organization, business processes, and notifications.

The effective date determines when an organization becomes visible and when administrators can assign roles to an organization. Workday prioritizes the effective date over the Availability Date in Workday-delivered transactions. We recommend creating a custom validation to prevent the organization from being used in a transaction with an effective date earlier than the Availability Date.

Steps

1. Access the Create Supervisory Organization task.

2. As you complete the header, consider:

Option	Description
Availability Date	This sets when the organization appears in prompts.
Name	Workday creates an effective date for the name when you create a supervisory organization. Note: When you change the effective date for an organization name change and the organization name matches in the next snapshot, Workday updates the effective date of that next snapshot but doesn't create a new snapshot. Workday displays translations by effective date in the Name History grid. When you create a new effective date, Workday doesn't copy the translations from the previous effective date when you: • Select the Hide Translations after Base Value Change check box on the Edit Tenant Setup - Global task. • Modify the organization name in the base language of the effective date.
Subtype	Select a Workday-delivered subtype, or you can use the Maintain Organization Subtype task to create a subtype to suit your business needs.
Visibility	Select to determine who can view an organization, including search results. Workday prioritizes this value over the access rights on a worker's role-based security group.
Primary Location	Workday uses the primary location on the Create Position business process to route steps to a security group when: • The security group is based on a location hierarchy. • You configure more than 1 location or don't identify a location. The primary location has a separate effective date. Set the primary location effective date to one before the effective date of the organization to ensure it displays. You can change the primary location and effective date by selecting Supervisory Organization > Edit Primary Location from the related actions menu of the supervisory organization.

3. As you complete the Assign Roles tab, consider:

Option	Description
Role	You can select supporting roles to include in a supervisory organization to meet your business needs. Each organization has roles that represent the supporting group assigned to it. Supporting roles have responsibilities within a functional area. Example: Compensation partner or HR partner. You can configure a role that you select on this task with the Is Leader role linked to the Workday-owned Manager role on the Maintain Assignable Roles task. When you assign a role to a supervisory organization, Workday doesn't restrict visibility of past-dated events. Workday recommends that workers with a role on a supervisory organization belong to a different supervisory organization to ensure correct business process routing. Only role maintainers can view the Effective Date and Next Effective Date columns on the Roles tab of the supervisory organization for security groups they're a member of.
Restricted to Single Assignment	Workday automatically selects or clears the check box depending on your configuration on the Maintain Assignable Roles task, indicating which roles you can assign to only 1 worker.

4. As you complete the Organizations Assignments tab, consider:

Option	Description
Inherited from Superior	The Inherited from Superior check box is set automatically and informational only. When you don't specify any organization assignments, Workday automatically selects this check box. When you make changes to the organization assignments of a subordinate organization, Workday automatically clears this check box. Workday displays inherited values from superior organizations when there are no overrides for Allowed Organizations or Default Organizations. To control organizations that are available during supervisory organization assignment, select the Show in Change Organization Assignments and Job Requisition check box on the relevant organization tab on the Maintain Organization Types report. When you don't select the Show in Change Organization Assignments and Job Requisition check box:

Option	Description
	• Organizations that workers are members of won't display for organizations that roll up to the organization type. • Some organization data won't be available. • The organization won't display on the worker position. Note: Organization assignments inherited from superior organizations aren't effective-dated, but hierarchies are. To support effective dating for an organization assignment, define an effective-dated hierarchy as an allowed value.
Allowed Organizations	Restricts available organizations for organization assignment. A value in this column overrides Inherited from Superior.
Default Organizations	Workday populates these organizations based on whether you clear the Position Assignment Unique check box on the Custom tab on the Maintain Organization Types report. A value in this column overrides Inherited from Superior.

5. Workday plans to retire the Identifiers tab in a future release. We recommend you not use this feature.

Result

Workday automatically generates an organization ID after you create a supervisory organization. You might experience performance issues when you have more than 5,000 active workers in a single supervisory organization. Once the role is assigned to the worker, the permissions given are not restricting access to a workers event history as of a specific timeframe.

Next Steps

Create your own organization ID format and assign your supervisory organizations.

You can change the name and apply effective dating by selecting Supervisory Organization > Edit Name/Code from the related actions menu of the supervisory organization. You can view organization history on this task and on the Organization History report.

Workday delivers a number of standard reports that give you insight into the details of your organization. For a complete list of Workday-delivered standard reports, access the Workday Standard Reports report and select the Organizations report category.

Related Information

Concepts

Concept: Roles Assignments, Positions and Role Inheritance on page 913

Concept: Custom Organizations on page 879

Concept: Staffing Models

The Next Level: Searching Efficiently for Staffing Organizations

Concept: Organization Charts on page 863

Tasks

Change Organization Visibility on page 847

Steps: Change Organization Assignments for Worker

Reference

Reference: Edit Tenant Setup - Global on page 67
Reference: Edit Tenant Setup - HCM on page 72
Reference: Edit Tenant Setup - System on page 164

Examples

Community: Importing the Excel Org Chart into Visio

Automatically Generate Reference IDs for Supervisory Organizations

Context

Workday enables you to automatically generate reference IDs for supervisory organizations using a sequence generator. Organization reference IDs can be:

- Used in organization names. This makes the organization reference ID visible when viewing or editing a supervisory organization.
- Searched in Workday. If you search for an organization ID (using a either complete or partial organization ID), Workday returns all supervisory organizations associated with the specified organization ID. Search results include all supervisory organizations that match the search criteria, regardless of whether you selected the Include Organization ID in Name option when creating a supervisory organization.

You can also use the Get_Organization_Reference_Id and Put_Organization_Reference_Id web service operations to bulk update reference IDs and include the organization ID in the supervisory organization name. These operations are part of the Human Resources web service.

Steps

1. Access the Create ID Definition / Sequence Generator task.

   Create an ID definition to use with your supervisory organizations.
2. Access the Edit Tenant Setup - HCM task.

   Enable the ID Definition for Supervisory Organization option using the ID definition you created for supervisory organizations.
3. (Optional) Accessthe Create Supervisory Organization task.

   Select the option to include the organization ID in the organization name.
4. (Optional) Use the Put_Organization_Reference_Id web service operations (part of the Human Resources web service) to bulk update existing supervisory organizations with automatically generated organization reference IDs or provide a specific reference ID.

Related Information

Tasks

Create ID Definitions and Sequence Generators on page 12

Reference

Reference: Edit Tenant Setup - HCM on page 72

Set Up Nonsupervisory Organizations

Prerequisites

Security: At least 1 of these domains in the Organizations and Roles functional area:

- *Create: Company*

- *Create: Cost Center*
- *Create: Custom Organization*
- *Manage: Matrix Organizations*
- *Create: Region*
- *Manage: Retiree Organization Create*

Context

Workday provides several organization types for you to manage aspects of your company. When you create an organization, you can assign roles to it. Roles and role-based security groups determine access to information about that organization, business process approvals, and notifications.

Steps

1. Access 1 of these tasks:
    - Create Company
    - Create Cost Center
    - Create Custom Organization
    - Create Matrix Organization
    - Create Region
    - Create Retiree Organization
2. As you complete the task, consider:

Option	Description
Name	The name, code, and whether the code is included in the name are effective dated. You can change the name and apply effective dating by selecting Organization > Edit Name/ Code from the related actions menu of the organization. Organization name and code history are visible on this task and on the Organization History report. When you create a new effective date for an organization name change and the organization name matches the next snapshot, Workday updates the effective date of that next snapshot to the earlier date. Workday displays translations by effective date in the Name History grid. When you create a new effective date, Workday doesn't copy the translations from the previous effective date when you: • Select the Hide Translations after Base Value Change check box on the Edit Tenant Setup - Global task. • Modify the organization name in the base language of the effective date.
Phonetic Name (Company only)	When you add or update a phonetic name, Workday displays the company or business entity name in both the local language and English on specific financial documents. Displays when:

Option	Description
	• You enable phonetic names on the Edit Tenant Setup - Global task. • Users select the relevant locale and display language in their preferences.
Availability Date	Workday-delivered validations don't use the Availability Date. You can create a custom validation to prevent the organization from being used in a transaction with an effective date earlier than the Availability Date.
Visibility	When determining who can view an organization, Workday prioritizes organization visibility over the access rights of the worker's role-based or user-based security group. To grant modify access to administrators and limit organization visibility to role assignees only, you must also assign the role to administrators. Visibility also controls whether workers can see the organization details or only the organization name in prompts and reports. You can restrict visibility entirely for supervisory organizations. However, for other organization types, the organization name is visible in prompts and reports, but the organization details and related actions aren’t.
Restricted to Companies	When you restrict cost centers to specific companies, Workday supports valid company and cost center combinations on tasks where you enter both values. When you don't select a company, the cost center is valid for all companies.
Related Worktags	When you select an organization with related worktags in a transaction, Workday automatically populates those related worktags. When you enter a related worktag that has default values, the worktag you enter overrides any existing default value.

3. As you complete the Assign Roles tab, consider:

Option	Description
Role	The prompt displays roles you have permission to assign. Configure security groups that can assign the role on the Maintain Assignable Roles task.
Restricted to Single Assignment	Indicates that you can only assign the role to a single worker, as set on the Maintain Assignable Roles task.
Assigned To	Select positions or position restrictions to assign to the role.

Next Steps

Depending on the organization type, add the organization to a hierarchy by selecting:

- Organization > Assign Superior from the related actions menu of the organization.
- Organization > Assign Included Organizations.

For a complete list of Workday-delivered organization reports and descriptions, access the Workday Standard Reports report and select the *Organizations* report category.

Related Information

Concepts

Concept: Worktags on page 1360

Tasks

Maintain Organization Types on page 876

Create Locations on page 925

Create Pay Group for Third-Party Payroll

Change Organization Visibility on page 847

Change Organization Visibility

Prerequisites

Configure the *Change Visibility* business process and security policy in the Organizations and Roles functional area.

Context

You can make an organization visible to everyone or restrict visibility to:

- Role assignees.
- Role assignees and members.
- Role assignees of current and superior organizations.

Visibility restrictions work differently for workers in supervisory and nonsupervisory organizations. Workers without direct or inherited role assignments on:

- Supervisory organizations - Can't view anything about the organization.
- Nonsupervisory organizations - Can view the organization name as a text field in search, prompts, and reports, but they can't view the organization details.

Example: You can restrict visibility to organizations that are part of a planned reorganization. Once the reorganization takes place, you can change the visibility depending on your business needs. However, users who don't have visibility access can still navigate the organization with the prompts and see users within the organization.

Note: Setting access rights on the role-based security group for a worker's role to Current Organization and All Subordinates doesn't change these visibility restrictions.

Organization visibility doesn't affect these workers:

- Workers secured to *Set Up: Payroll - Pay Group Specific* domain in the Core Payroll functional area can view the details of a pay group.
- Workers secured to the *Worker Position: View* domain in the Staffing functional area can view organization assignment details on the position.

Steps

1. Select Organization > Change Visibility from the related actions menu of an organization.

   When you configure the organization as part of a hierarchy, you can only access the Change Visibility task from the top-level hierarchy.
2. As you complete the task, consider:

Option	Description
Everyone	Anyone can see this organization. Most supervisory organizations have this configuration.
Role Assignees	Only workers who inherit or are assigned to a role in the organization can view the organization details and related actions. Workers can only view subordinate organization details and related actions when they're assigned or inherit their role in the subordinate organization.
Role Assignees and Members	Only organization members and workers who inherit or are assigned to a role in the organization can view the organization details and related actions.
Role Assignees of Current and Superiors	Only workers assigned to a role in the organization or a superior organization can view the details and related actions of the organization and its subordinate organizations.

Related Information

Concepts

Concept: Role-Based Security Groups (Constrained)

Tasks

Create Integration System Security Groups

Steps: Set Up Matrix Organization Business Processes

Context

Matrix organizations represent indirect reporting relationships. Workers can belong to only one supervisory organization, but they can belong to multiple matrix organizations. They enable:

- You to create and manage dotted-line relationships between workers and one or more managers.
- Managers to be involved in approvals of HCM business processes, such as job changes, merit increases, and performance reviews, for the workers in their matrix organizations. You can configure Workday so that the manager can or can't view workers' compensation information.

Business process definitions must be configured to include matrix organization's managers in order for them to participate in HCM Business processes, such as job changes. The *Assign Multiple Matrix Members* business process enables you to assign a single or multiple workers to a matrix organization. The *Assign Matrix Organization* business process enables you to assign only a single worker to a matrix organization.

Steps

1. Edit Business Process Security Policies.

   Configure the security policy for these business processes in the Organizations and Roles functional area:

Business Process	Description
Assign Matrix Organization	You can assign security groups to view and approval steps, and these initiating actions: • *Assign Matrix Organization* • *Assign Matrix Member* • *Put Assign Matrix Organization (Web Service)* • *Import Assign Matrix Organization (WS Background Process)*
Assign Multiple Matrix Members	You can assign security groups to view and approval steps, and the *Assign Multiple Matrix Members* initiating action. When configuring the approval step, consider that the approver can view all the workers and positions that you're assigning. Only Matrix Roles and Unconstrained security groups are allowed for initiating actions. If a user has access to the initiating action through a matrix role, they can initiate *Assign Multiple Matrix Members* for matrix organizations they hold a role on. If a user has access to the initiating action through an unconstrained security group, they can initiate *Assign Multiple Matrix Members* for any matrix organization.
Remove From Matrix Organization	You can assign security groups to view and approval steps, and these initiating actions: • *Remove from Matrix Organization* • *Remove Matrix Member* • *Put Remove Matrix Organization (Web Service)* • *Import Remove Matrix Organization (WS Background Process)*
Remove Multiple Matrix Members	You can assign security groups to view and approval steps, and the *Remove Multiple Matrix Members* initiating action. When configuring the approval step, consider that the approver can view all the workers and the associated positions that you're removing. Only Matrix Roles and Unconstrained security groups are allowed for initiating actions. If a user has access to the initiating action through a matrix role, they can initiate *Remove Multiple Matrix Members* for matrix organizations they hold a role on. If a user has access to the

Business Process	Description
	initiating action through an unconstrained security group, they can initiate *Remove Multiple Matrix Members* for any matrix organization.

2. Edit Domain Security Policies.

   Configure the *Worker Data: Select Position*. Based on your configuration, users can assign and remove workers and positions to Matrix Organizations using the *Assign Multiple Matrix Members* business processes. If a user has access to this domain through:

   - An unconstrained security group, they can see all workers and their positions when completing the business process.
   - A constrained security group, they can only see workers and positions that they're contextually secured to with that security group.
3. Edit Business Processes.

   Configure these business processes in the Organizations and Roles functional area:

   - *Assign Matrix Organization*
   - *Assign Multiple Matrix Members*
   - *Remove From Matrix Organization*
   - *Remove Multiple Matrix Members*
4. Activate Pending Security Policy Changes.

Related Information
Concepts
2024R2 Feature Release Note: Assign Multiple Matrix Members to Matrix Organizations

Assign Workers to a Matrix Organization

Prerequisites

Configure these business processes and security policies in the Organizations and Roles functional area:

- *Assign Matrix Organizations*
- *Assign Multiple Matrix Members*

Context

Matrix organizations represent indirect reporting relationships. Workers can belong to only 1 supervisory organization, but they can belong to multiple matrix organizations. You can assign workers in bulk to a matrix organization using the *Assign Multiple Matrix Members* business process and the *Import Assign Matrix Organization* EIB.

The managers displayed on an organization chart are workers assigned to the roles marked as Is Leadership for *Matrix Organization* on the Maintain Assignable Roles task.

You can configure the *Assign Matrix Organizations* business process as a subprocess on other staffing business processes.

Steps

1. Access the relevant task:

   - Assign Matrix Member to assign a single worker to a matrix organization.

     Assign Multiple Matrix Members to assign multiple matrix members to a matrix organization.
2. Select the Effective Date of the assignment.

3. Select the Matrix Organization that you're assigning the worker or workers to.
4. Select the Worker. When the worker has multiple positions, select the Position of the worker.
5. Click Submit. You can use custom organization hierarchies to roll up matrix organizations.

Result

The update is routed to the approver. The approver will be able to see all workers and positions that are on the *Assign Multiple Matrix Members* business process event.

When the assignment is approved, as of the effective date, Workday displays the matrix organization details on the Job section of the worker's profile on the Management Chain and Organizations tabs.

Next Steps

The user with the Matrix Manager role has access to the workers in the matrix organization. Workday automatically assigns the matrix manager to the *Matrix Manager (Supervisory Hierarchy Access)* security group, which doesn't give them additional access by default. You can enable matrix managers to access the supervisory reports of any managers within matrix organizations by configuring the security group on a security policy. For performance reasons, we recommend that you don't use this security group in business process action steps.

Example: Helen is the matrix manager for the Matrix1 organization. Bob is a supervisory organization manager within Matrix1. Helen wants to see the business titles for all workers within Bob's supervisory organization. You assign the *Matrix Manager (Supervisory Hierarchy Access)* security group to the *Worker Data: Business Title on Worker Profile* domain. You give the group View access. Bob's supervisory organization includes subordinate organizations. Helen gains access to the workers in those organizations as well.

To remove:

- A single worker from a matrix organization, access the Remove from Matrix Organization task.
- Workers in bulk from a matrix organization, use the *Remove Multiple Matrix Members* business process and the *Import Remove Matrix Organization* EIB.

Related Information

Concepts

2024R2 Feature Release Note: Assign Multiple Matrix Members to Matrix Organizations

Steps: Set Up Manager Integrated Organizations

Prerequisites

Security: *Worker Data: Manager Integrated Organization* domain in the Staffing functional area.

Context

Manager Integrated Organizations (MIO) establishes a formal reporting link between a manager's position and the supervisory organizations they manage. You can configure MIO for a single organization, a branch of a supervisory hierarchy, or the entire hierarchy.

You can use these web services for mass configurations, initial setup, or migrations:

- *Get Manager Integrated Organization*
- *Put Manager Integrated Organization*

Steps

1. Edit Domain Security Policies.

2. For manual configurations, use the Edit Manager Integrated Organization task.

   A position can only have 1 Manager Integrated Organization relationship with an organization. When a position has multiple manager roles across many organizations, the task shows all the possible organizations for you to select only 1. If a worker has multiple positions, each position can be associated with a single organization.
3. (Optional) Edit Business Processes.

   Include the Edit Manager Integrated Organization task as a To-Do task in relevant business processes such as *Assign Roles* or staffing events such as Hire or Change Job to ensure MIO associations are formed when appropriate.
4. (Optional) Steps: Set Up Profile Cards.

   Use the Configure Profile Header Card task to display Manager Integrated Organization information on the Worker Profile section.

   a) Select Worker Profile and add Manager Integrated Organization as a card item.
5. (Optional) Create Custom Labels.

   Use the Maintain Custom Labels task to replace the term Manager Integrated Organization to align with your organization's terminology. Custom labels are available in English and in some supported languages.

Result

Once configured, the Manager Integrated Organization field displays on the Worker Profile Header card, in the Worker Profile's Job Details section.

You can now view and report on your supervisory organizations as manager-integrated groups, comprising members of an organization and their manager.

You can use these fields (secured to the *Public Reporting Items* domain) to view and report on relationships:

- Is Manager Integrated Organization on the Supervisory Organization business object. Use this field to determine if an organization has a MIO relationship with a position.
- Manager Integrated Organization on the Position and Jobs - All Staffing Models business object. Use this field to identify the organizations that a position has a MIO relationship with.
- Manager Integrated Organization for Staffing Event on the Position and Jobs - All Staffing Models business object. Use this field to determine if a position is MIO at the time of the staffing event.

Workday displays MIO values in the global search results when you configure them for a worker's primary position.

The MIO data is available for these integration points:

- Data sources
- Web services
- Reports-as-a-Service (RaaS)
- Payroll Effective Change Interface (PECI)
- Cloud connectors

Example

Next Steps

Concept: Organizations and Custom Objects

Create Custom Objects and Fields

Workday enables you to create custom objects and fields for these organization types:

- Company
- Cost Center
- Custom Organization
- Location
- Region
- Supervisory Organization

View and Edit Custom Objects and Fields

From the related actions menu of an organization, select Additional Data > View All or Additional Data > Edit.

- To view a custom object, you must belong to a security group with View permissions to a domain that secures the custom object.
- To edit a custom object, you must belong to a security group with Modify permissions to a domain that secures the custom object.

Note: To access custom fields for an organization that is returned by the Lookup Organization function, you need to create additional calculated fields.

View Custom Fields on Profile Views

Workday provides an Additional Data profile tab that is available on organization types that support custom objects and fields.

To display the Additional Data profile tab, access the Configure Profile Group task.

The Additional Data tab only displays the custom objects and custom fields for which you have View permissions on the domain security policy that secures the custom objects.

Related Information
Concepts

Concept: Security for Custom Objects on page 500

Tasks

Steps: Set Up Profiles and Profile Groups on page 321

Create and Edit Custom Object Definitions on page 485

Create Calculated Fields on page 511

Reference: Organization Types and Subtypes

Organizations enable you to group resources, workers, costs, and other organizations for business process routing, security, analysis, and reporting. Workday delivers different organization types for different functional purposes. Example: Your supervisory organizations reflect the reporting structure, and your cost centers and regions reflect your costing structure. You can also create your own custom organization types.

Use organizations to:

- Aggregate data for reports.
- Assign workers to their management and support teams.
- Initiate business processes.

Some organization types have a corresponding hierarchy for grouping organizations to represent a structure. Hierarchies enable you to assign and inherit roles, share business processes, and consolidate results.

Workday Delivered Organization Types

Organization Type	Description	Tasks	Domains
Academic Unit	Provides the basis to manage faculty appointments in education.	• Create Academic Unit • Edit Academic Unit • View Academic Unit • View Academic Unit As Of	• *Set Up: Academic Units* • *Reports: Academic Units*
Academic Unit Hierarchy	Roll up or grouping of academic units that typically reflects a structure of a college or university.	• Create Academic Unit Hierarchy • Edit Academic Unit Hierarchy • View Academic Unit Hierarchy • View Academic Unit Hierarchy As Of	• *Set Up: Academic Unit Hierarchies* • *Reports: Academic Unit Hierarchies*
Business Unit	Typically used to reflect lines of business that might cut across multiple companies or legal entities.	• Create Business Unit • Edit Business Unit • View Business Unit	*Set Up: Worktags - Business Unit*
Business Unit Hierarchy	Hierarchy for business units.	• Create Business Unit Hierarchy • Edit Business Hierarchy • View Business Unit Hierarchy	*Set Up: Worktags - Business Unit*
Committee	Tracks various types of committees from corporate to department level.	• Maintain Committee Definition • View Committee Definition	• *Committee Definition: Manage* • *Committee Definition: Reporting*
Company	The primary organization type for Workday Financial Management. All financial transactions are for a company. Most financial reports, such as balance sheets and income statements, run in the context of a company. Workday recommends that you create a separate company for each internal entity with a separate tax ID.	• Create Company • Company > Company Edit (related action) • View Company • View Company As Of	• *Manage: Company* • *Reports: Company View as of Date*
Company Hierarchy	Hierarchy for companies.	• Create Company Hierarchy • Organization > Edit Organization (related action) • View Organization • View Organization As Of	• *Create: Company* • *Set Up: Organization*

Organization Type	Description	Tasks	Domains
Cost Center	Tracks financial transactions and HCM transactions with a financial impact, such as hiring or terminations. Assign employees and contingent workers to a cost center when you hire them. You can roll up cost centers into cost center hierarchies, which can only store cost centers for reporting purposes. You can't associate transactions with a cost center hierarchy. The Edit Cost Center task enables you to specify related worktags.	• Create Cost Center • Cost Center > Edit Cost Center (related action) • View Cost Center • View Cost Center As Of	• *Manage: Cost Center* • *Reports: Cost Center View as of Date*
Cost Center Hierarchy	Hierarchy for cost centers.	• Create Cost Center Hierarchy • Organization > Edit Organization (related action) • View Organization • View Organization As Of	• *Create: Cost Center* • *Set Up: Organization*
Custom Organization	Enables you to group workers into logical constructs that aren't defined by the other Workday-provided organization types.	• Create Custom Organization • Custom Organization > Edit Custom Organization (related action) • View Custom Organization • View Custom Organization As Of	• *Manage: Custom Organization* • *Reports: Custom Organization View as of Date*
Fund	Primarily used by public sector and higher education organizations. You can use funds as a worktag in financial and payroll transactions.	• Create Fund • Edit Fund • View Fund	*Set Up: Fund*
Fund Hierarchy	Hierarchy for funds.	• Create Fund Hierarchy • Edit Fund Hierarchy • View Fund Hierarchy	*Set Up: Fund*
Gift	Primarily used in higher education and nonprofit organizations and typically represent gifts of money as a funding source. A common type of gift is an endowment.	Create Gift	Configure the *Gift Event* business process and security policy in the Endowment Accounting functional area.
Gift Hierarchy	Hierarchy for gifts.	• Create Gift Hierarchy • Edit Gift Hierarchy • View Gift Hierarchy	• *Set Up: Endowments* • *Manager Reports: Endowments* • *Reports: Endowments*

Organization Type	Description	Tasks	Domains
Grant	Primarily used by public sector and higher education organizations.	• Create Grant • Edit Grant • View Grant	• *Set Up: Grants* • *Process: Grants* • *Set Up: Basic Grant Worktag*
Grant Hierarchy	Hierarchy for grants.	• Create Grant Hierarchy • Edit Grant Hierarchy • View Grant Hierarchy	*Process: Grants*
Location	Locations are an attribute associated with a worker in a position. You can also use locations for assets. Locations reflect a worker's work location rather than an area of responsibility. Location hierarchies have organizational roles and can include locations for grouping purposes.	• Create Location • Edit Location • View Location • View Location As Of	• *Manage: Location* • *Location: View*
Location Hierarchy	Hierarchy for locations.	• Create Location Hierarchy • Organization > Edit Organization (related action) • View Organization • View Organization As Of	• *Manage: Location Hierarchy* • *Set Up: Organization*
Matrix	Contains workers from different supervisory organizations who work together. Each matrix organization has a manager who has a leadership relationship to all the members of the matrix organization. However, the manager of a worker's supervisory organization retains ultimate authority over the worker. You can use a custom hierarchy to group matrix organizations. Workday automatically adds assigned matrix managers to the *Matrix Manager (Supervisory Hierarchy Access)* security group. You can configure the security group to grant members access to the supervisory reports of any managers within matrix organizations. Matrix organizations are freestanding and aren't related to a supervisory organization.	• Create Matrix Organization • Organization > Edit Organization (related action) • View Organization • View Organization As Of	• *Manage: Matrix Organizations* • *Set Up: Organization*

Organization Type	Description	Tasks	Domains
Pay Group	Aggregates workers and the rules that govern how their pay is calculated. Each worker who receives pay through Workday Payroll must be a member of exactly 1 pay group unless you're using the multiple jobs functionality.	• Create Pay Group • Organization > Edit Organization (related action) • View Pay Group	• *Set Up: Payroll - Pay Group Specific* • *Set Up: Payroll Interface*
Program	Primarily used by public sector and higher education organizations. Programs typically have long-term if not permanent high-level purposes.	• Create Program • Edit Program • View Program	*Set Up: Program*
Program Hierarchy	Hierarchy for programs.	• Create Program Hierarchy • Edit Program Hierarchy • View Program Hierarchy	*Set Up: Program*
Project	Projects enable you to define work that aligns with strategic company and individual goals. A project belongs to a project hierarchy. The resource plan to assign workers to a project is defined on the project or inherited from the project hierarchy. You can use billable projects to bill time and expenses to customers. You can use project scenarios for project planning	• Create Project • Edit Project • View Project	• *Set Up: Project Details* • *View: Project* • *Self-Service: Project* • *Manage: Project*
Project Hierarchy	Hierarchy for projects.	• Create Project Hierarchy • Edit Project Hierarchy • View Project Hierarchy	• Configure the *Create Project Hierarchy* business process and security policy in the Projects functional area. • *Set Up: Project Hierarchy*
Region	Reflects the area of responsibility for a worker instead of the work location. Example: A salesperson might work from a Miami location, which rolls up to North America, but might be responsible for sales to the Latin American region.	• Create Region • Region > Edit Region (related action) • View Region • View Region As Of	• *Manage: Region* • *Reports: Region View as of Date*
Region Hierarchy	Hierarchy for regions.	• Create Region Hierarchy • Organization > Edit Organization (related action) • View Organization • View Organization As Of	• *Create: Region* • *Manage: Region* • *Set Up: Organization*

Organization Type	Description	Tasks	Domains
Retiree Organization	Holds retirees, and provides visibility and management access for retiree administrators and partners.	• Create Retiree Organization • Organization > Edit Organization (related action) • View Organization • View Organization As Of	• *Manage: Retiree Organization Create* • *Reports: Organization* • *Set Up: Organization*
Supervisory Organization	Supervisory organizations group workers into a management hierarchy. A supervisory organization can be a business unit, department, group, or project. Jobs, positions, and compensation structures are associated with supervisory organizations. Workers are hired into jobs or positions associated with a supervisory organization. You can assign business processes to a supervisory organization. All approvals and checklists are established for the supervisory organization hierarchy. You can set up variations for organizations within that hierarchy. You can create and insert supervisory organizations into a hierarchy as a single action. There's no separate action to create a supervisory hierarchy.	• Create Supervisory Organization • Supervisory Organization > Edit Supervisory Organization (related action) • View Supervisory Organization • View Supervisory Organization As Of	• *Manage: Supervisory Organization* • *Reports: Supervisory Organization View as of Date*
Union	Unions track and report on union membership for workers.	• Maintain Unions • View Union	*Set Up: Unions*
Workteam	Contains workers grouped together in a freestanding, nonhierarchical, task-based team, such as a scrum or task force. Workteam membership can be self-managed and dynamic, and members can be active, passive, or inactive.	• Create Workteam • Edit Workteam • View Workteam Membership As of • View Workteam	• *Manage: Workteam* • *Manage: Workteam Membership History* • *Self-Service: Workteam*

Workday also provides report data sources with report fields for each organization type to simplify their use in custom reports, notifications, and condition rules.

Organization Subtypes

You can distinguish between multiple instances of the same organization type by using organization subtypes. Example: You could divide supervisory organizations into organization subtypes of Department, Division, or Group. For organization types that are hierarchies, subtypes define the levels in a hierarchic structure.

Access the Maintain Organization Subtypes task to manage organization subtypes.

Composite Views

Several organization types have their own composite view or profile made up of profile groups and reports (or allowed worklet tasks).

Each allowed worklet task (tab) has its own security. Workers must belong to the appropriate security domains for an organization type to view a tab on a composite view for the organization.

Profile groups for organization types include:

- Overview for Company
- Overview for Cost Center
- Overview for Custom Organization
- Overview for Region
- Overview for Supervisory Organization

Access the Configure Profile Group task to configure the composite view for each segmented organization type. The Details tab is specific to each organization type.

Related Information

Concepts

Concept: Workday Projects
Concept: Locations and Location Hierarchies on page 928
Concept: Custom Organizations on page 879
Concept: Membership Rules on page 880

Tasks

Maintain Organization Types on page 876
Create Academic Units
Set Up Supervisory Organizations on page 840
Set Up Nonsupervisory Organizations on page 844
Create Gifts
Steps: Set Up Profiles and Profile Groups on page 321
Steps: Set Up Committees on page 891
Steps: Set Up Funds
Set Up Pay Groups
Set Up Unions

Reference

FAQ: Membership Rules on page 882

Examples

Edit Business Process Security Policies

FAQ: Supervisory Organizations and Staffing Events

Can Nonsupervisory Roles Perform Staffing Tasks?

Nonsupervisory roles are roles that are on an organization that's not supervisory. Nonsupervisory roles can only perform staffing tasks for workers and positions in associated supervisory organizations linked to the nonsupervisory role through the:

- Company or Company Hierarchy
- Cost Center or Cost Center Hierarchy
- Location Hierarchy
- Region or Region Hierarchy
- Custom Organization

- Matrix Organization
- Pay Group
- Retiree Organization

Access the Business Process Security Policies for Functional Area report and add the nonsupervisory roles to the security groups that can initiate these tasks.

Task	Location Hierarchy Restrictions	Other Nonsupervisory Organizations
Create Position Set Hiring Restrictions	You can only create positions or set hiring restrictions in a supervisory organization whose primary location is in a location hierarchy you can access.	Only staffing organization roles from the supervisory organization defaults can perform these tasks.
Add Job Contract Contingent Worker Hire Employee Start International Assignment	The position or hiring restrictions must be either: • Associated with a business site location in a location hierarchy you can access. • Unassociated with a specific business site location.	The position or hiring restrictions must be in the nonsupervisory organization.
All other worker-based tasks, such as Change Contact Information	The worker's position must be in a business site location in a location hierarchy you can access.	The worker's position must be in the nonsupervisory organization.
All other position-based tasks, such as Edit Position and Change Job	The position must be in a business site location in a location hierarchy you can access. If you use the Change Job task to move a worker but not the position, the location hierarchy automatically populates from the first available of the: • Hierarchy associated with the proposed location. • Hierarchies associated with the location hiring restrictions. • Hierarchy associated with the primary location of the proposed supervisory organization.	The position must be in the nonsupervisory organization. If you use the Change Job task to move a worker but not the position, only roles from the default organizations associated with the proposed supervisory organization can perform the task.

How Are Historical Staffing Events Secured?

Workday secures a staffing event to the organizations of the position. Users with roles on those organizations have access to those current and historical staffing events. To view events for a worker that's no longer part of the supervisory organization, use the View Supervisory Organization As Of task.

Example: A worker leaves Supervisory Organization A and joins Supervisory Organization B. You're an HR Partner whose role is based on Supervisory Organization B. You don't have a position or role on Supervisory Organization A. You don't have access to the historical staffing events completed when the worker was in Supervisory Organization A.

Related Information

Concepts

Concept: Role Assignments and the Snapshot Date Model on page 916

Reference

Reference: Organization Types and Subtypes on page 853

Organization Charts

Set Up Organization Chart Metrics

Prerequisites

Security: *Metric Management* domain in the System functional area.

Context

You can configure organization and position metrics to display on organization charts, enabling workers to view data directly from the chart.

Workers can access metrics on an organization chart when you:

- Give them access to these domains in the System functional area:
  - *Metrics Published*
  - *Metric View Org Chart*
- Remove them from the *People-View Org Chart* domain in the System functional area.
- Grant them security permissions to at least 1 dashboard and 1 metric configured for the organization that they're viewing.

Steps

1. Access the Create Org Chart Metrics Configuration task.
2. Select an Organization that corresponds to the top-level organization for the metric sets you want to configure.
3. As you complete the task, consider:

Option	Description
Dashboard	Workday recommends that you select a dashboard that uses the metric sets you selected.
Metric	You can assign a total of 10 metrics to a single dashboard across all metric sets.

Result

Workers with access to metrics can:

- Click the gear icon to select a dashboard and up to 3 metrics to view.
- Toggle the metric view with the metrics view org chart icon.

Related Information

Concepts

Concept: Organization Charts on page 863

Examples

Steps: Create Custom Metrics and Scorecards

The Next Level: Org Charts Series

The Next Level: Workforce Analytics Series

Set Up Organization Charts

Prerequisites

Security: *Set Up: Tenant Setup - General* domain in the System functional area.

Context

You can use organization charts to view detailed representations of organization structures and hierarchies, including the reporting relationships, divisions of work, and levels of management of an organization.

You can set up different fields to display on your organization. You can create only 1 custom organization chart configuration for a primary business object.

Steps

1. Access the Create Org Chart Business Object Configuration task.
2. Select the Primary Business Object.

   An organization chart configuration only modifies the nodes displaying the Primary Business Object.
3. Select the Usage to determine the content to configure.

   - *Line 1*
   - *Line 2*
   - *Line 3*
   - *Navigable Owner*
   - *Navigation Icon*
   - *Navigator Image*

   The usage determines where Workday displays each field on the card. When you don't configure an override, Workday applies the default values to the supervisory organization and worker. When you select a value in the Usage prompt, Workday doesn't display any default fields on the organization chart.

   Example: When you select *Organization* as the primary business object and *Manager* in the Field prompt for Line 3, Workday only displays the manager on each card and the default Workday icon for the organization.

   You can't configure the title of an organization on the organization chart.

   The field values you configure for each card are static and don't dynamically change when you filter the organization chart viewing options.
4. Select a Business Object for the report field.

   Select the business object associated with the report field that you want to display on the organization chart.

5. Select a Field to display on the organization chart.

   Workday enables you to select either public or nonpublic report fields to display on your organization chart based. When users don't have security access to report fields on an organization chart, Workday displays blank lines.

   When you select the Worker Profile Default Position report field, Workday displays the same position on the worker profile and the organization chart. For a worker on international assignment, Workday displays their international assignment position on the organization chart.
6. Click OK. When you view a supervisory organization in the organization chart, Workday only displays one manager in a leadership role.

Example

1. Select *Cost Center* from the Primary Business Object prompt.
2. Select *Navigable Owner* from the Usage prompt. By default, the *Navigable Owner* is the organization manager.
3. Select *Cost Center* from the Business Object prompt.
4. Select *Cost Center* from the Field prompt.
5. Add a row.
6. Select *Line 1* from the Usage prompt.
7. Select *Cost Center Manager* from the Business Object prompt.
8. Select *Full Name* from the Field prompt.

When you view an organization chart, Workday only displays the cost center name and manager's name.

Next Steps

Access the Delete Org Chart Business Object Configuration task to revert configurations. Access the Edit Org Chart Business Object Configuration task to edit existing configurations.

Concept: Organization Charts

Workday organization charts enable you to navigate an organization and its relationship to superior and subordinate organizations. Access these reports to view an organization chart:

- Organization > View Org Chart As Of from the related actions menu of an organization.
- View Team from the preview window of a worker or position.

Workday displays organization names as of the effective date on the View Org Chart As Of task.

Leadership positions on organization charts display based on hiring order rather than alphabetical order. Terminated workers won't appear in the Org view unless the Org view date/Effective Date is on or before their termination date.

Filters

In the Org Chart section on the Edit Tenant Setup - HCM task, you can select filters that users can apply when they view organization charts. You can also hide open positions and contingent workers from users.

Contingent workers who are managers always display on organization charts.

Org-View Organization Chart

Workday displays the org-view when you access the organization chart from the related actions menu of an organization. The org-view organization chart displays:

- Organizations with a yellow banner.
- Individual contributor jobs or positions with a blue banner.

The cards on the org-view organization chart represent organizations and jobs or positions rather than workers. The workers on the cards represent either the Manager/Leader of the organization or the worker filling the individual contributor job or position.

People-View Organization Chart

Workers secured to the *View: People-View Org Chart* domain can see the people-view organization chart when they access these reports:

- My Org Chart.
- View Team from the preview window of a worker or position.

Unlike the org-view, the cards on the people-view organization chart represent workers.

The people-view organization chart includes all supervisory and matrix organizations of which the worker is a manager or member. Workday displays direct and indirect reports for all the worker's positions. When you use the People-View Organization Chart, Workday recommends that you configure a default role for the assignable role that's not linked to the Workday-owned manager role.

Matrix reports have a dotted gray line around their borders. You can include or exclude them with the *Include Matrix Reports* filter.

Workers secured to the *View: People-View Org Chart* domain can't access organization chart metrics.

Navigate Hierarchy

To view the hierarchy of an organization, you can use the Navigate Hierarchy task or click Hierarchy > View Hierarchy from the organization’s related actions menu.

Unlike org-view and people-view organization charts, the cards on the hierarchy organization chart represent supervisory or subordinate organizations and their reporting structure.

Metrics

Workers secured to the *Metric View Org Chart* domain can access organization chart metrics by clicking the Metrics View Org Chart icon on org-view organization charts.

Use the gear icon to select a dashboard and up to 3 metrics to display. The dashboards and metrics available depend on the organization you're viewing.

You can click individual metrics to view the metrics scorecard dashboard for an organization.

Printing and Exporting

You can use the printer icon to export any organization chart to these file formats:

- Excel
- PDF
- PowerPoint

Workers secured to any of these domains can export to all 3 file formats:

- *Print: Supervisory Organization Chart*
- *Print: Supervisory Organization Chart as of Date*
- *Print: Navigate Supervisory Organization*

You can limit which file formats workers can export an organization chart to by removing them from the 3 domains above, as well as the *Reports: Navigate Organization* domain, and securing them to at least 1 of these domains:

- *Print: Organization Chart - Excel*
- *Print: Organization Chart - PDF*
- *Print: Organization Chart - PowerPoint*

You can export an organization hierarchy to PDF format in Org Studio when you're secured to the *Org Designs: Export Design* domain.

When you export an organization chart to Excel, you can import that organization chart into Visio. Workday recommends using Visio 2016 or later on Windows.

Related Information
Tasks
Set Up Organization Chart Metrics on page 861
Set Up Supervisory Organizations on page 840
Steps: Set Up Org Studio on page 888
Reference
Reference: Edit Tenant Setup - HCM on page 72
Reference: Edit Tenant Setup - System on page 164
Examples
Steps: Create Custom Metrics and Scorecards
The Next Level: Org Charts Series
The Next Level: Workforce Analytics Series
Community: Importing the Excel Org Chart into Visio

Manage Organization Concepts

Concept: Dividing Organizations

Workday enables you to create a new sibling organization and select which subordinate organization to move into it. Example: your company is restructuring and a new organization is created at the same level with employees from a different organization.

You can divide these organization types:

- Supervisory Organizations
- Company Hierarchies
- Cost Center Hierarchies
- Location Hierarchies
- Region Hierarchies
- Custom Organizations

Divide Organization Business Process

You initiate the *Divide Organization* business process when you select Reorganization > Divide Organization as a related action on the existing organization.

After you divide an organization, you can view the business process history in the Process tab of the Details and Process section.

The new organization inherits roles from the organization superior to the original organization by default. You can configure the *Divide Organization* business process definition to launch the *Assign Roles* business process as a subprocess. This enables you to override inherited role assignments and to directly assign roles to specific workers.

Rescind Divide Organization Business Process

When you rescind the *Divide Organization* business process:

- the new sibling organization created during the business process is removed from the hierarchy, but remains active as a free-standing organization.

- any subordinate organizations moved during the business process are moved back to the original organization.

To rescind the assignment, select Business Process > Rescind from the related actions menu of the business process, not the related actions menu of the step.

If you rescind the *Divide Organization* business process, any role assignments made during the *Assign Roles* business process are rescinded.

Concept: Reorganizations

Reorganizations enable you to rearrange and refine your organization structures and hierarchies. A reorganization event enables you to:

- Group diverse reorganization activities into an event that Workday tracks.
- Apply a common effective date to the reorganization activities for 1 or more organizations.
- View and manage reorganization activities in delivered reports and queries.

Reorganization Events

Before you can perform a reorganization, you must define a *reorganization* event to track and manage your reorganization activities in Workday. You create a reorganization event when you create a new organization and you can associate this event with more than 1 activity.

When performing reorganization events on an organization, you should make changes in effective date order. Example: If there’s a future-dated inactivation event dated 1/1/2022, you can't do a reorganization event, such as assigning a superior or creating a subordinate, with an earlier effective date than 1/1/2022.

These tasks require a reorganization event in Workday:

- Create Organization
- Assign Included Organizations
- For custom organizations (using the Reorganization related action):
    - Assign Workers
    - Assign Members Using Rule
- Move Retirees

Creating and changing matrix organizations doesn’t require a reorganization event. When you use a task that requires a reorganization event, Workday recommends you use the UI task and not a web service because reorganization events aren't available on all web services.

Reorganization Grouping

You can use reorganization events to group reorganization activities in different ways. When grouping reorganization events, take these guidelines into account:

Consideration	Description
Logical Relationships	Avoid grouping unrelated tasks or breaking up activities that are part of a single event.
Hierarchy	Consider hierarchy type. Example: for accurate reporting, include cost centers in 1 node and 1 cost center hierarchy structure only. When you include a cost center in another node with the same top-level hierarchy and select it in a reorganization event, Workday moves it from its original node.

Consideration	Description
Effective Date	Group activities that take place at the same time. When you make changes to an existing reorganization event, the effective date of the reorganization becomes the effective date of the changes. You can move workers or retirees who are hired or transferred as of as of or after the reorganization effective date.
Future-Dated Events	Workday enables you to use unlimited future-dated reorganization events, but an organization can only have 1 future-dated reorganization at a time.
Staffing	Use separate reorganization events by period when you perform staffing activities periodically. Example: Assign Workers. You should set the effective date as the beginning of each period.

Reorganization Activity

You can display reorganizations by activity or by organization. To view:

- All reorganizations for a specific date range, run the Reorganizations report. You can include inactive reorganizations in your report.
- Individual reorganizations, use the Edit Reorganizations task.

View the reorganization activities for a reorganization event ordered by organization on the By Organization tab. View the reorganization activities for a reorganization listed in order of reorganization activity on the By Activity tab.

Related Information
Concepts
Setup Considerations: Org Studio and Mass Actions on page 884

Concept: Moving Workers by Organization

Workday enables you to move workers, positions, or jobs to another organization as a stand-alone business process, without requiring you to select a reorganization event. You can move workers belonging to these organization types:

- Company
- Cost Center
- Region
- Supervisory

You can also move workers in custom organizations when the position assignment is unique.

Moving workers by organization requires you configure these business processes and security policies in the Staffing functional area:

- *Change Job*
- *Move Workers (By Organization)*
- *Move Workers (Supervisory)*

The *Move Workers (By Organization)* business process is available on nonsupervisory organizations with these options selected in the Position Assignment section of the Maintain Organization Types task:

- Allow Reorganization Tasks.
- Unique.

Move Workers (By Organization) is a stand-alone business process that initiates the *Move Worker (By Organization)* subprocess for each worker who is moved.

For supervisory organizations, you can only move workers between organizations with the same staffing model (job or position management). If you move open jobs or positions, you can't fill them until after the effective date of the *Move Workers (By Organization)* event.

You can also move workers with these tasks:

- From the related actions menu of a supervisory organization, select Job Change > Move Workers (Supervisory). The *Move Workers (Supervisory)* business process moves multiple workers from one supervisory organization to another.
- From the related actions menu of a worker or position, select Job Change > Transfer, Promote or Change Job to move a single worker, position, or job. The *Change Job* business process enables you to enter detailed position or job data as part of the transfer. If you move a manager, you can also move the teams that report to that manager.

When you move workers out of an organization, the selection list depends on the organization type and its (or its associated supervisory organization's) staffing model:

Staffing Model	Supervisory Organization	Non-Supervisory Organization
Job Management	Move jobs.	Move jobs.
Position Management	Move filled positions or unfilled position restrictions. Job Overlap: If a position restriction overlaps, you can't select it from the prompt.	Move positions or unfilled position restrictions. If you select a position, the move also affects the position restriction. Job Overlap: If you select a position that overlaps another position, the move only affects the position you select and not the corresponding principal or overlap position.

When you move workers, their positions, roles, and compensation rules remain the same in the new organization.

Rescind Move Worker

To rescind the move for all workers, select Business Process > Rescind from the related actions menu of the business process (not the related actions menu of the step). When you rescind the *Move Workers (By Organization)* business process, Workday returns all moved workers to their original organization.

You can also rescind the *Move Worker (By Organization)* business process for a single worker. To rescind a *Move Workers (By Organization)* transaction, you must be a member of a security group specified in the business process security policy for the *Rescind* action.

Related Information
Examples
Move Workers in Supervisory Organizations

Concept: Organization Search

To improve speed and accuracy, Workday recommends these best practices for organization searches.

Search Terms and Categories

To optimize search performance:

- Don't set All of Workday as the default search parameter.
- Limit the number of terms you enter for faster searching.
- Narrow search categories for refined results.
- Use unique search terms to improve search accuracy.

All of Workday is not available as a search parameter in People Experience.

Search Attributes and Results

Workday uses these indexed attributes to determine which organizations to return in search results:

- Organization Name
- Organization Code
- Organization Subtype
- Global Names of Workers in Leadership Roles
- Organization ID, when you use an organization prefix.

When you search for an organization using the name that's displayed in Workday, search results might include organizations with display names that don't match any of the search terms that you entered because the search engine checks these attributes for each core organization type.

Note: Indexed search attributes don't consider any of these fields:

- Include Manager/Leader in Name
- Include Organization Code in Name
- Include Organization ID in Name
- Include Organization Subtype in Name (Configured in the Maintain Organization Subtypes task.)

Example: Even when an organization doesn't have Include Organization Code in Name selected, search results still return the organization when the organization code matches at least 1 search term that you entered.

When your search contains more than 1 term, the results include all organizations with an indexed attribute that matches any of your search terms. Workday displays organizations that include all of the search terms at the top of the results. Example: Searching for *Global Modern Smith* returns organizations that contain *Global*, *Modern*, *Smith, or* any combination, with organizations that contain all 3 words at the top.

Prefixes

When you use prefixes, you can limit search results to organizations. In global search, when you don't use an organization prefix, search results list workers that match your search terms before listing organizations because workers have a higher search relevancy. Example:

- To find only the organizations that Alex Smith manages, enter *org: alex smith*.
- To find only supervisory organizations that Alex Smith manages, enter *sup: alex smith*.

When you enter *Alex Smith* with no prefix, search results list all workers with *Alex Smith* in their names first, then organizations with an indexed search attribute that matches *Alex* or *Smith*.

Prefixes ignore the search category. The Common search category doesn't consider organization reference IDs, so using an organization prefix expands search to consider organization reference IDs.

You can view a list of search prefixes by entering ? in global search. Alternatively, access the View Search Tips option after searching in Workday to view search examples and a list of Workday search prefixes.

When you use the org: prefix, Workday searches all organization types. You can use these search prefixes for these core organization types:

Core Organization Type	Search Prefix (if available)
Company	*company:*

Core Organization Type	Search Prefix (if available)
Company Hierarchy	
Cost Center	*costcenter:*
Cost Center Hierarchy	*cch:*
Custom Organization	
Location Hierarchy	*loch:*
Matrix	
Pay Group	*paygroupname:*
Region	*region:*
Region Hierarchy	
Supervisory	*sup:*
Retiree	

Delimiters

Workday search supports these special characters as search delimiters:

- Underscore (_)
- Hash (#)
- Greater than (>)
- Forward slash (/)

Example: A search for *Modern* returns an organization with any of these names:

- Global_Modern_Services
- Global#Modern#Services
- Global>Modern>Services
- Global/Modern/Services

The search engine treats all other special characters as part of the search term. Example: To search for an organization named *ABC-123-456*, enter *ABC-12* rather than *ABC12* or *123*.

Related Information
Reference
Reference: Search Workday on page 330

Concept: Correct Organization Exceptions

Workday provides the Correct Organization Exceptions task to enable you to correct organizations that are in an invalid state. This task enables you to:

- Remove primary or alternate locations from nonsupervisory organizations.
- Remove the Organization Type or Organization Visibility set on subordinate organizations. These attributes should only be set on top-level organizations in a hierarchy.
- Remove staffing models from nonsupervisory organizations.
- Add an Organization creation status (an Availability Date) to organizations that don’t have a creation status.
- Restore the original Organization Type or Organization Visibility to top-level organizations that lost them.

Related Information

Concepts

Concept: Superior and Subordinate Organizations on page 872

Concept: Inactive Organizations

The Inactivate Organization task initiates the *Inactive Organization* business process. When you initiate the *Inactive Organization* business process, you can retire organizations that are no longer in use. Example: Organizations without:

- Active members.
- In-progress staffing actions.
- Open positions.

You can inactivate organizations of these types:

- Company
- Cost Center
- Custom
- Matrix
- Pay Group
- Region
- Retiree
- Supervisory

You can also inactivate organizations that are location hierarchies.

You can only access the Inactivate Organization task by selecting Reorganization > Inactivate Organization from the related actions menu of an organization. You must cancel or complete all in-process events for the organization you're inactivating and move all workers and positions out of the organization, including positions that will be active in the future. You should configure the *Activation* business process and security policy in the Organizations and Roles functional area.

When you inactivate an organization:

- It retains its superior organization, role inheritance, and worker and event history unless you remove it from the hierarchy. As a best practice, Workday recommends that you leave the inactive organization in the hierarchy to retain role inheritance. Historical reporting reflects organization activity for dates when the organization was active.
- Workday recommends that you leave inactive cost centers in reports to ensure accuracy when reporting on time frames when the organization was active.
- Workday moves active subordinate and included organizations to the superior of the inactive organization. If the superior is inactive, you must specify an organization. Inactive subordinates and included organizations remain fixed unless you move them to the superior or a different organization.
- Consider setting up a designated hierarchy for inactive organizations to ensure that role inheritance and performance are unaffected in active organizations. Note that moving an inactive organization out of its existing hierarchy could affect historical reporting. Workday doesn't display inactive organizations on the organization chart.

Workday provides you with these options for subordinate organizations on the Inactivate Organization task:

Option	Description
Move All to Superior	Move all active and inactive subordinate organizations and included organizations to the superior organization.
Move All to Organization	Specify a new superior organization for all active and inactive subordinate organizations and included organizations.

Option	Description
None of the above	Use the Current Subordinates grid to assign new superior organizations individually.

You can use the Keep All Role Assignments option on the Roles tab to select all roles to change inherited and default role assignments to explicit role assignments. Roles that are directly assigned to an inactive organization aren't inherited from the superior.

The Remove from Hierarchy option removes the superior organization and its inherited role-based security history. You can access the View Organization History report from the related actions menu of the organization to view previous reorganization events.

If an inactive organization has no superior organization, Workday displays the previous superior, and the effective date of the inactivation so that you can easily reassign the previous superior, and enable role inheritance. Workday recommends using the *Reassign Superior To Inactive Organization* web service to automatically bulk reassign inactive organizations to their last superior organization.

Rescind Inactive Organizations

When you rescind the *Inactive Organization* business process:

- Subordinate organizations that you move to the superior organization remain subordinates of the new superior organization.
- Rescinding the business process doesn’t revert any role assignment changes you've made.

Select Business Process > Rescind from the related actions menu of the business process, not the related actions menu of the step, to rescind an inactivation.

You can’t rescind a staffing transaction for a worker who is moving back to an organization that’s inactive or becoming inactive. You must first reactivate the organization.

Reactivate Organizations

Reactivating an organization initiates the *Reactivation* business process. When you reactivate an organization, the reactivation has the same effective date as the most recent inactivation event. You should rescind reorganization events with an effective date after the reactivation date because reorganization events must be in chronological order.

You can reactivate an inactive organization using the Activate related action. The reactivation event doesn't restore its:

- Previous members.
- Superiors.
- Subordinates.
- Included member organizations.
- Role assignments.

Concept: Superior and Subordinate Organizations

Supervisory organizations group workers into management hierarchies to define reporting structures. A supervisory organization can be a business unit, department, group, or projects. Supervisory organizations report to one another to form the supervisory organization hierarchy. Each supervisory organization can:

- Have only one superior organization.
- Have many subordinate organizations.
- Exist in a single hierarchy only.

Jobs, positions, and compensation structures are associated with supervisory organizations. Workers are hired into these jobs and positions and each worker is a member of a supervisory organization. A manager role is assigned to a supervisory organization, or is inherited from a superior organization. A manager can't be a member of the organization they manage.

Assigning superior organizations and creating subordinate organizations are reorganization related actions that you can use on custom, retiree, and supervisory organization types and on these hierarchies:

- Company
- Cost Center
- Location
- Region

You can only include superior and subordinate organizations in a hierarchy when they're the same organization type. You can't assign a superior organization to an existing organization with a top-level node that's referenced in a calculated field on a custom organization enabled for hierarchies.

Superior Organizations

When you create a supervisory organization, you can assign roles to it. Roles and role-based security groups determine access to information about that organization, business processes, and notifications. You can configure the *Assign Organization* business process to require a series of approvals for changing an organizational hierarchy and controlling access to information about your organization.

Creating a superior organization and assigning a superior organization are different business processes. When you assign a superior organization to another organization, you might create a duplicate instance in the same hierarchy. You can include duplicate instances in the same hierarchy, but they can cause issues such as unbalanced financial reports.

You can't assign a superior organization to an existing organization with a top-level node that's referenced in a calculated field on a custom organization enabled for hierarchies.

Subordinate Organizations

You can create a subordinate organization when you transfer or promote a worker from an individual contributor to a manager. The *Change Job* business process and web service support the *Create Subordinate* subprocess. When you set a future effective date for subordinate organizations, members of user-based security groups can assign roles immediately. Members of role-based security groups can assign roles on or after the effective date, when role inheritance is enabled. You can create a custom validation to prevent use of subordinate organizations before the availability date. You can view the history of:

- A subordinate organization from the organization related action menu.
- The *Create Subordinate* business process in the organization history of the superior organization.

Rescind Superior and Subordinate Organizations

To rescind the superior assignment, select Business Process > Rescind from the related actions menu of the business process in the Details and Process section.

If you rescind the *Create Subordinate* business process, Workday removes the hierarchical relationship between the organizations. However, Workday doesn't rescind any role assignments made during the *Assign Roles* subprocess. The formerly subordinate organization remains active as a free-standing organization with all of its role assignments in effect. You can add an organization to a hierarchy to create relationships for reporting purposes without assigning a superior or creating a subordinate organization.

Related Information

Concepts

Concept: Roles Assignments, Positions and Role Inheritance on page 913

Concept: Correct Organization Exceptions on page 870

Concept: Manager Integrated Organizations

You can use Manager Integrated Organizations (MIO) to create a direct reporting link between a manager's position and the supervisory organization they manage. Workday enables you to view and report on your supervisory organizations as manager-integrated groups, which include the members of an organization and their manager.

You can use MIO to align your existing Supervisory Hierarchy with real-world organizational structures without replacing or directly impacting existing business process routing or security configurations. You can:

- Eliminate manual data entry and workarounds, such as using custom organizations.
- Provide precise organizational data on worker profiles and in reports, addressing critical reporting gaps.
- Improve the flow of information to other systems, simplify integrations, and ensure data quality for reports such as headcount, turnover, and budgeting.

You can configure MIO for supervisory organizations only, and you must assign a direct manager role to a position.

MIO doesn’t support inherited manager roles. A position can only maintain a single MIO relationship in an organization.

You can adopt MIO for a single organization, a specific branch of your supervisory hierarchy, or the entire hierarchy.

MIOs are visible in:

- Global Search: When configured for a worker's primary position, the MIO appears in place of the supervisory organization in the worker's subtitle on search results.
- Worker Profiles: You can configure the Manager Integrated Organization field to display on the Worker Profile Header card, providing quick visibility into the organization a worker manages directly. The information also appears in the Job Details section.
- Mobile Devices: You can view the MIO value is visible on the worker profile on mobile devices, but can’t access the task to manage MIOs.

You can customize the Manager Integrated Organization value to align with your organization's specific terminology.

Custom Organizations and Membership Rules

Steps: Assign Membership Rules in Custom Organizations

Prerequisites

On the Maintain Organization Types report for custom organizations, set:

- Allow Reorganization Tasks to Yes.
- Position Assignment Unique to No.

Context

Instead of assigning workers individually, membership rules enable you to assign multiple worker positions to custom organizations based on defined criteria. Membership rules evaluate active and terminated workers.

Membership rules can be:

- Static Rules: Calculate and explicitly assign membership at the time that you apply the rule to the custom organization. To remove workers later, you must explicitly remove them or apply another static rule.
- Dynamic Rules: Calculate membership when you access a custom organization on a report. Note that using dynamic membership rules on custom organizations with large numbers of workers can cause performance problems.
- Semidynamic Rules: Calculate membership every 4 hours. Semidynamic rules start as dynamic rules.

Static and semidynamic rules perform faster than dynamic rules. Static rules run once, whereas semidynamic rules determine membership dynamically and add or remove workers every 4 hours.

Changing membership rules from dynamic to semidynamic can improve performance.

Steps

1. Access the Create Membership Rule task.

   Create membership rules for custom organizations.

   Security: *Manage: Membership Rule Create* domain in the Organizations and Roles functional area.
2. Access the related actions menu of a custom organization.

   From the related actions menu, select either:

   - Reorganization > Assign Workers to link a dynamic or semidynamic rule to a custom organization. When you use this task to associate a static membership rule to a custom organization, the rule automatically changes to semidynamic.
   - Reorganization > Assign Members Using Rule to assign a custom organization explicitly to workers who meet the rule criteria.

   To preserve existing members, select Add to Existing Members, otherwise Workday replaces existing members with members who satisfy the membership rule criteria.

   Security: *Manage: Organization Edit and Reorganization Action* domain in the Organizations and Roles functional area.
3. (Optional) To change a dynamic rule to semidynamic, access the Edit Membership Rule task.

   See Manage Membership Rules on page 879.

Result

Workday displays workers assigned to the custom organization on 1 of these grids:

- By Membership Rule: By a dynamic or semidynamic membership rule.
- Members: Manually or by a static membership rule when results are for 50,000 workers or fewer.

Note: Use the View Organization Members report (secured to the *Worker Data: All Positions* domain) for custom organizations with more than 50,000 members that don't have hierarchies enabled. Depending on your domain security configuration, the member count for the View Organization Members report might differ from the Organization > View Members As Of related action.

Workers assigned by a dynamic rule won't display in the Organizations tab of the worker profile if you change Allow Reorganization Tasks to No.

Workers won’t display as members of the rule when you view the organization with an effective date that's earlier than the effective date of the reorganization selected to assign the rule to the custom organization. Additionally, workers might not display as members when you view the organization with an effective date that matches or is later than the reorganization effective date when their position doesn't meet the rule criteria as of the effective date that you're viewing the organization. Example: When a worker's membership changes as of a future date, their position, organization, or location might have changed or the rule criteria might have changed.

Next Steps

View rule criteria updates from the related actions menu of the membership rule. Select Effective Stating > View Audit Entries and filter by scheduler.

Related Information

Concepts

Concept: Custom Organizations on page 879

Concept: Membership Rules on page 880

Tasks

Manage Membership Rules on page 879

Reference

FAQ: Membership Rules on page 882

Reference: Edit Tenant Setup - HCM on page 72

Reference: Edit Tenant Setup - System on page 164

Examples

Concept: Eligibility for Time Off Plans, Time Off, and Accruals

Community: Importing the Excel Org Chart into Visio

Maintain Organization Types

Prerequisites

Security: *Set Up: Organization* domain in the Organizations and Roles functional area.

Context

You can maintain Workday-delivered organization types and create your own custom organization types.

- Costing
- Hierarchy
- HR
- Pay
- Custom

When you select a category, Workday displays both the Workday-delivered organization types and custom organization types that are available to you within that category.

You can only delete a custom organization type that isn't in use.

Steps

1. Access the Maintain Organization Types report.
2. Select the organization category and organization type that you want to change and click Edit.
3. As you complete the task, consider:

Option	Description
Organization Type Name	When you use the custom organization type as a financial worktag in transactions, Workday displays the name as a category in the prompt.
Use as Financial Worktag	Workday automatically enables this option for certain organization types such as Company and Location. Custom organizations can't have other organizations as members. You can create up to 10 custom organizations to use as financial worktags. To use a custom

Option	Description
	organization as a financial worktag, you must select the worktag in the Custom Organization Worktag Dimension prompt. Select the Position Assignment Unique check box to select the Use as Financial Worktag check box simultaneously with these position assignment options: • *Allow Reorganization Tasks* • *Show in Change Organization Assignments and Job Requisition* • *Position Assignment Required* Select the Use as Financial Worktag check box to: • Make the organization type available for payroll costing on the Maintain Worktag Usage report. • Configure default worktags for organization types that support them. • Use as HR Worktag or be available for payroll costing allocations. You can only delete custom organization types with a Usage Count value of zero. When an organization has related worktags, you can't clear the Use as Financial Worktag check box until you remove all references to organizations of this type in related worktags. Also, you can't clear this check box after you use a custom organization as a worktag on any transaction. See Concept: Financial Accounting
Use as HR Worktag	Only available on custom organizations. Select this check box to make the organization type available as a worktag in headcount plans. Enable Use as Financial Worktag to select this check box. When you enable the custom organization as an HR worktag and configure the organization as a headcount plan dimension, you can't clear this check box.
Available for Payroll Costing Allocation	Select this check box to create up to 10 custom organizations for payroll costing allocations. Enable Use as Financial Worktag to select this check box. This check box indicates whether the organization type is either: • Configured as a balancing worktag at the tenant level. • Enabled as a Primary or Additional worktag type under Payroll Costing Allocation on the Maintain Worktag Usage task.

Option	Description
	See Steps: Configure Worktag Balancing for Journals and Reference: Edit Tenant Setup - Payroll.
Custom Organization Worktag Dimension	Enables you to run dimensional reports when this custom organization is on transactions. You can have up to 10 worktag dimensions available to associate with a custom organization type. You can only associate 1 worktag dimension on 1 custom organization type. Once you make the association, you can't use the dimension again. Enables you to use a custom organization as a dimension within account posting rules. You can post operational transaction types from the custom organization to a specific ledger. See Concept: Custom Organizations
Used by Organization Subtypes	Configure subtypes on the Maintain Organization Subtypes task. A custom organization type requires at least 1 subtype.
Show in Change Organization Assignments and Job Requisition	Enables you to assign or reassign workers to this custom organization in the Change Organization Assignments task. This option also enables you to add this organization type to a job requisition. If users in your organization don't have security access to this organization type, the field won't display on these tasks: • Change Organization Assignment • Create Job Requisition • Edit Job Requisition If you don't select this check box, some organization data won't be available and the organization won't display on the worker position. See Steps: Change Organization Assignments for Worker.
Position Assignment Unique	Select this check box to assign the organization type to only 1 position group. You can't select this check box when you use membership rules to assign members to custom organizations. See Concept: Custom Organizations.

Related Information

Concepts

Setup Considerations: Worktags on page 1347

Concept: Organization Assignment Worktags

Examples

Steps: Enable Worktags for Cost Allocations

Manage Membership Rules

Prerequisites

Security: *Manage: Membership Rule Edit* domain in the Organizations and Roles functional area.

Context

Static and semidynamic membership rules perform faster than dynamic rules. To improve performance, Workday recommends that you apply semidynamic membership rules for:

- Time off rules that return more than 3,000 workers.
- Rules with Include Subordinate Organizations in Rule selected.

Note that worker profiles might not reflect custom organization membership for up to 4 hours after you update a worker or semidynamic rule.

To avoid performance problems with report fields that use membership rules, ensure that all membership rules in your tenant are semidynamic. When report fields use dynamic membership rules, Workday evaluates each instance that includes the report field, which can cause delayed report results or failures.

With semidynamic rules, members added during a reorganization only display as of the effective date of the reorganization.

Steps

1. Access the Edit Membership Rule task.
2. Select the rule that you want to edit.

   Membership rule usage must be dynamic before you can change it to semidynamic.
3. Select Semidynamic Membership Evaluation to convert a dynamic membership rule into a semidynamic membership rule.

Related Information

Concepts

Concept: Membership Rules on page 880

Tasks

Steps: Assign Membership Rules in Custom Organizations on page 874

Reference

Reference: Edit Tenant Setup - HCM on page 72

Reference: Edit Tenant Setup - System on page 164

Examples

Concept: Eligibility for Time Off Plans, Time Off, and Accruals

Community: Importing the Excel Org Chart into Visio

Concept: Custom Organizations

You can use custom organizations to group workers into logical constructs that Workday-provided organization types haven't defined.

Use the Maintain Organization Types task to define custom organization types. You can configure a custom organization to be a worktag in financial transactions, and assign a worker to the custom organization in organization assignment. In this case, the custom organization defaults as a worktag into transactions that involve the worker. You can mark up to 10 custom organization types as a financial worktag. In addition to using worktags in business process routing, you can also use worktags as a dimension in reporting. When you configure a custom organization to display in Change Organization Assignment, then you can't assign it using membership or Assign Worker tasks.

When you select Use as Financial Worktag for a custom organization, that custom organization defaults into transactions for organization members. You can select it as a worktag in financial transactions and route transactions to people with roles on the custom organization.

Use *custom organizations* as worktags when you want to:

- Assign worktags to workers so that they populate onto financial transactions like expense reports.
- Assign roles to worktags for business process approval and reporting.
- Create worktag hierarchies for navigation as well as validation logic and condition rules.

Note: If the worktags for financial transactions doesn't require the above capabilities, you should instead use *custom worktags*. However, note that custom worktags are available for payroll transactions but not payroll costing transactions. For more information, refer to the *Payroll for the U.S. > Labor Costing* documentation (or *Payroll for Canada > Labor Costing* documentation).

You can define related worktags on a custom organization. When you enter the custom organization into a transaction, Workday defaults its related worktags into the Worktags field on the transaction. The latest default for a worktag type overrides any previous value.

Example: You can define an organization type of *Store*, and create a custom organization with that type for each store location such as *San Francisco Store* and *New York City Store*.

- If an employee of the *San Francisco Store* creates an expense report, you can have that store automatically display as a worktag in the expense report.
- If you assign the *Store Manager* role to the *San Francisco Store*, you can configure the *Create Expense Report* business process to route to the person in that role whenever a store employee submits an expense report.

Use Custom Organizations to Mass Distribute Documents

Workday enables you to mass distribute documents or tasks by organization. Custom organizations enable you to use membership rules to assign members to a specific custom organization either statically or dynamically. You can then mass distribute documents to members of that custom organization.

Use Custom Organizations as a Dimension in Account Posting Rules

When you use a custom organization as a dimension, you can assign that dimension to specific ledgers within your account posting rules. When you assign a custom organization as a dimension to a ledger, organizational transaction types made to that custom organization will automatically post to the ledger associated with it.

Related Information
Tasks

Steps: Assign Membership Rules in Custom Organizations on page 874

Mass Distribute Documents or Tasks on page 383

Reference

FAQ: Membership Rules on page 882

Examples

Steps: Change Organization Assignments for Worker

Concept: Membership Rules

Membership rules enable you to assign worker positions to custom organizations automatically based on defined criteria. Membership rules affect performance, so it's important that you configure them carefully.

Membership rules assign workers based on an intersection of 3 attribute types:

- Location
- Organization
- Position

Position attributes include:

- Job families.
- Job profiles.
- Management level.

When you create a membership rule that uses position attributes, the results include workers that match any of the attributes. In general, position attributes perform better than organization attributes in membership rules.

Organization attributes include:

- Include Subordinate Organizations in Rule.
- Include Subordinate Organization Roles.
- Organization Subtypes.

When you create membership rules that use organization criteria, consider the criteria carefully. Criteria that return a large number of organizations can affect performance, especially when you include subordinate organizations. Membership rules that use organization criteria use intersection logic, so results include workers in organizations who meet all of the criteria.

When you create membership rules that use 2 or more of the 3 attribute types (position, organization, or location), the results include members of an intersection of the 3 attribute types. In this case, membership rule results include workers that meet any 1 of the position criteria (job family, job profile, or management level) and:

- A value in each field of the organization criteria (included organizations, included organization roles, or included organization subtypes).
- Any of the selected locations.

Membership rules don't remove explicitly assigned members. You can view explicitly assigned members and members assigned by rules in different grids on the Members tab of the custom organization.

Membership Rule Types

Membership rules can be:

- Static: Calculate membership when you select Assign Members Using Rule from the related actions menu on the custom organization. The Assign Members Using Rule explicitly assigns members.
- Semidynamic: Calculate membership every 4 hours. (Semidynamic rules start as dynamic rules.)
- Dynamic: Calculate membership whenever security is evaluated for the custom organization.

Dynamic rules have the greatest impact on performance, especially when your rule includes subordinate organizations. You can improve the performance impact of membership rules by making your rules semidynamic. Reserve dynamic rules for custom organizations in which latency in security evaluation would have serious consequences.

Best Practices for Membership Rules

Membership rules affect performance, so it's important that you configure them carefully by following these best practices:

- When possible, use position attributes instead of organization attributes.
- When you use organization attributes, don't include subordinate organizations.
- Membership rules evaluate terminated workers and active workers. When you have many terminated workers, consider putting them in a separate location hierarchy that is excluded by the membership rule criteria.
- Membership rules that return a large number of active or terminated workers can diminish performance. In which case, use semidynamic rules to improve performance.
- Use static or semidynamic membership rules instead of dynamic rules whenever possible because dynamic membership rules are re-evaluated each time that membership is evaluated.

- If you require dynamic membership rules, we strongly recommend you enable the Enable Dynamic Membership Rule Evaluation Optimization check box on the Edit Tenant Setup - HCM task.
- Workday recommends that you avoid dynamic membership rules when the membership rules return more than 3,000 members for time off rules. (Use semidynamic rules instead.)
- To improve performance, ensure that all membership rules in your tenant are semidynamic. When report fields use dynamic membership rules, Workday evaluates each instance that includes the report field, which can cause delayed report results or failures.
- Static membership rules can be used to assign members explicitly to a custom organization by selecting Assign Members Using Rule from the related actions menu on the custom organization.
- You can't rescind membership rules that mass assign workers to a custom organization using Assign Members Using Rule. Instead you can use Reorganization > Move Workers from the related actions menu to move workers to another organization. Note that you must clear the Position Assignment Unique check box for the custom organization.
- When you need membership rules to include more than 10,000 positions, configure 2 or more membership rules.
- To view members of a custom organization that doesn't have hierarchies enabled and has more than 50,000 members, use the View Organization Members report (secured to the *Worker Data: All Positions* domain). Depending on your domain security configuration, the member count for the View Organization Members report might differ from the Organization > View Members As Of related action.

Related Information

Tasks

Steps: Assign Membership Rules in Custom Organizations on page 874

Manage Membership Rules on page 879

Reference

FAQ: Membership Rules on page 882

Reference: Edit Tenant Setup - HCM on page 72

Reference: Edit Tenant Setup - System on page 164

Reference: Organization Types and Subtypes on page 853

Examples

Community: Importing the Excel Org Chart into Visio

Edit Business Process Security Policies

FAQ: Membership Rules

Why does the Member count display zero?	The Member count displays zero when no workers meet the membership rule criteria as of the effective date when you select Reorganization > Assign Workers to assign the rule to the organization.
Do workers need to meet all selection criteria in a membership rule to be a member?	Workers are members when they meet these conditions: • You include them in an organization listed in the Includes Organizations prompt, or in any subordinate organizations when you select Include Subordinate Organizations in Rule. • When Organization Subtype has 1 or more values, the organizations match 1 of the subtype values. • Role assignees in the organizations are members of the included organizations when you select a value for Include Organization Roles.

	• The worker's primary position matches at least 1 value in the Job Families, Job Profiles, or Management Level prompts. • When Location has a value, the worker's primary position is included. Example: When you add Job Families and Management Levels to a rule, Workday assigns workers as members when they meet either criteria. When you select a Locations, the worker must meet at least 1 location criteria and 1 of the Job Families or Management Levels criteria.

How do I assign members to a custom organization using a rule that I just created?	To use membership rules to assign members to a custom organization,
	
	1. View the Maintain Organization Types report for your custom organization and ensure that you meet these conditions:
	  • Allow Reorganization Tasks is true.
	  • Position assignment Unique is false.
	2. From the related actions menu for the custom organization, select Reorganization > Assign Workers to assign members using your new rule. Alternatively, you can:
	  • Explicitly assign members using your new rule, by selecting Reorganization > Assign Members Using Rule.
	  • Select specific workers, by selecting Reorganization > Assign Workers and then select the individual workers.

What results should I expect if I have a membership rule that includes both an organization role and an organization (with or without subordinates)?	When you configure membership rules with selections for both the Includes Organizations and Includes Organization Roles prompts, your results include all workers in the selected organizations and all workers that are assigned to the selected roles for the selected organizations.
How do I manage membership rules when my organization has a large number of workers?	When you need to include more than 10,000 positions, configure 2 or more membership rules. When a custom organization has more than 50,000 workers, the member count on the Members grid displays a message telling you to use the View Organization Members report (secured to the *Worker Data: All Positions* domain) to view custom organizations with more than 50,000 workers that don't have hierarchies enabled. Depending on your domain security configuration, the member count for the View Organization Members report might differ from the Organization > View Members As Of related action.

Related Information

Concepts

Concept: Custom Organizations on page 879

Concept: Membership Rules on page 880

Tasks

Steps: Assign Membership Rules in Custom Organizations on page 874

Reference

Reference: Organization Types and Subtypes on page 853

Examples

Edit Business Process Security Policies

Org Studio and Mass Actions

Setup Considerations: Org Studio and Mass Actions

You can use this topic to help make decisions when planning your configuration and use of Org Studio and Mass Actions. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Workday provides Org Studio and Mass Actions so that you can collaboratively visualize, plan, and approve reorganizations and implement the changes within Workday. Org Studio provides a drag-and-drop interface that enables you to iterate through the planning stages with stakeholders using current organization charts and data. After stakeholders approve plans, Workday transfers your model and data to Worksheets. From Worksheets, you can refine and correct your plans and then implement your new structure as a mass action. You can also use Mass Actions to process other business process events in bulk through Worksheets.

Business Benefits

Org Studio and Mass Actions reduce manual processes and the need for external tools by enabling you to plan and implement changes within Workday.

Use Cases

You can use Org Studio and Mass Actions to:

- Create and collaborate on organizational designs.
- Copy Org Studio designs to evaluate several reorganization alternatives.
- Test multiple versions of a reorganization structure.
- Create, move, edit, or inactivate supervisory organizations.
- Add and move workers.

Questions to Consider

Questions	Considerations
How do you want to restructure your organization?	Consider the size of your reorganization. If it's a small reorganization, start with an organization that is as low on the hierarchy as possible. The higher up you start in the hierarchy, the more impact your changes will have on your organization.
Who will collaborate on the reorganization, and in what role?	Consider who should plan reorganizations, as well as who should be able to take these actions: • Approve • Deny • Edit • Submit • View People with the permission to edit, approve, or submit designs can have a significant impact on your organization.
When do you want to implement your reorganization?	Org Studio and Mass Actions use live data from your organizations. When you complete designs in Org Studio and move them into a Mass Actions workbook, data in your tenant can change and require further action. Workday recommends that you limit the time between reviewing and submitting designs to avoid errors caused by data changing outside of the planning process.

Recommendations

To avoid approval routing and numerous tasks in My Tasks when completing a reorganization or initiating Mass Actions, configure rule-based business process definitions for these business processes with the Mass Action Type report field:

- *Assign Superior*
- *Change Organization Assignments for Worker*
- *Change Job*
- *Close Position*
- *Create Position*
- *End Contingent Worker Contract*
- *Move Workers (Supervisory)*
- *Termination*

While the recommended amount of transactions in a design is 1000-2000 transactions, performance varies based on the size of the design, length of time the design is open, and the complexity of the changes. For best performance, select an amount closer to 1000 transactions. If needed, you can split the total amount of transactions across multiple designs.

Requirements

Set up Org Studio, Drive, and Worksheets in Workday.

Limitations

Workday currently supports these Org Studio and Mass Actions transactions:

- Add Subordinate Org
- Add Worker
- Assign Role
- Assign Superior
- Change Organization Assignments for Worker
- Close Position
- Change Job
- Create Position
- Create Subordinate
- Edit Organization
- End Contingent Worker Contract
- Inactivate Organization
- Move Workers (Supervisory)
- Termination

Workday doesn’t support delegation or proxy sessions for Org Studio and Mass Actions.

The *Mass Action Event* business process doesn't support *Approval* steps.

The *Complete Mass Action* step doesn't support constrained security groups. Workday recommends that you use an unconstrained security group or the initiator security group in the *Complete Mass Action* Step.

You can share mass action worksheets with constraint security groups but view and edit access to mass action worksheets depends on the position and domain security settings that you apply to the profiles.

Org Studio supports the Configure Optional Fields task for these transactions:

- End Contingent Worker Contract
- Termination

Tenant

No impact.

Security

Domains	Considerations
Maintain: Org Designs domain in the Organizations and Roles functional area.	Secures access for users to create, edit, manage, collaborate, and report on all designs related to the organizations and roles that the designs are secured to. You should secure groups to either the *Maintain: Org Designs* domain or the *Participate: Org Designs* domain, not both. The *Maintain: Org Designs* domain grants access to all designs within an organization structure. If you want to limit access, use the *Participate: Org Designs* domain instead.
Mass Action Events domain in the System functional area.	Secures access to submit and complete Mass Actions.
Participate: Org Designs domain in the Organizations and Roles functional area.	Secures access for users to create, edit, or share their designs or collaborate on designs that other users share with them.

Domains	Considerations
	Secure groups to either the *Participate: Org Designs* domain or the *Maintain: Org Designs* domain, not both. You can select which Org Studio features and transactions users have access to by using the *Participate: Org Designs* domain.
Subdomains for the *Participate: Org Designs* domain in the Organization and Roles functional area: • *Org Designs: ~Terminate~* • *Org Designs: Assign Roles* • *Org Designs: Assign Superior* • *Org Designs: Change Business Title* • *Org Designs: Change Org Assignments* • *Org Designs: Close Position* • *Org Designs: Create Position* • *Org Designs: Create Subordinate Org* • *Org Designs: Edit Org* • *Org Designs: End ~Contingent Worker~ Contract* • *Org Designs: Export Design* • *Org Designs: Inactivate Org* • *Org Designs: Job Change* • *Org Designs: Move Worker* • *Org Designs: Reports* • *Org Designs: Undo and Redo* • *Org Designs: View Job Details*	Each subdomain secures access to a specific feature or related action within Org Studio designs, giving you more control over users' activities.
Worker Position: View domain in the Staffing functional area.	Secures access for users to view filled positions or workers in an Org Studio design
Worker Data: All Positions domain in the Staffing functional area.	Secures access for users to view open positions in an Org Studio design.

Business Processes

- *Mass Action Event*
- *Reorganization with Org Studio*

Reporting

The changes that you plan in Org Studio and complete in a reorganization workbook display in worker histories as regular events.

You can use the View All Mass Action Events report to review your reorganization events. You can also create custom reports for Org Studio and Mass Action designs by using the Org Design business object. The Org Design business object includes report fields to help you track and manage designs. Examples:

- Action Business Process
- Action Type
- Organization Type
- Org Design Name
- Owner

- Role Added
- Shared With
- Staffing Model
- Starting Point
- Status

You can use these Report Data Sources to find specific details about the proposed changes in your designs:

- All Organizations in Org Design (Supervisory)
- All Positions in Org Design (Supervisory)
- Org Design Action for Org (Supervisory)
- Org Design Action for Workers (Supervisory)

You can use the Maintain Org Studio Report Configurations task to configure which reports using these RDSs are available in Org Studio for you to select.

Integrations

No impact.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships across your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Org Studio and Mass Actions can touch these areas in Workday:

- Business processes
- Organizations
- Staffing

Related Information

Concepts

Concept: Reorganizations on page 866

Tasks

Steps: Set Up Drive on page 411

Set Up Worksheets

Configure Rule-Based Business Processes on page 1014

Reference

2021R1 What's New Post: Org Studio Designs

The Next Level: Getting Started with Org Studio and Mass Actions

The Next Level: Role-Based Security for Org Studio

Steps: Set Up Org Studio

Context

Set up security for the *Reorganization with Org Studio* business process to plan, review, and implement reorganizations. Once configured, you can complete transactions like moving workers and assigning superior and subordinate organizations in Org Studio using a drag-and-drop organization chart. You can then process those transactions using a Mass Action workbook.

Steps

1. Edit Domain Security Policies.

   Configure the security policies for these domains in the Organizations and Roles functional area:

   - *Maintain: Org Designs*
   - *Participate: Org Designs*

   Access to the *Maintain: Org Designs* domain grants administrative rights over a feature, enabling users to view and edit all org designs, regardless of ownership. Access to the *Participate: Org Designs* domain enables users to interact with their own designs and designs shared with them. Users with *Maintain: Org Designs* access can perform all staffing transactions within a design, while users with *Participate: Org Designs* access are limited to transactions available through specific subdomains (Example: The *Org Designs: Terminate* domain enables access to termination transactions within a design). Generally, it's redundant to assign both permissions to a user, as *Maintain: Org Designs* access alone provides equivalent capabilities. We recommend that you secure groups to either domain, not both.

   Configure the security policies for the subdomains under the *Participate: Org Designs* domain.
2. Edit Business Process Security Policies.

   Configure security permissions for the *Reorganization with Org Studio* business processes.
3. Edit Business Processes on page 1005.

   Access the Create Business Process Definition (Default Definition) task and select the *Reorganization with Org Studio* business process type.

   a) On the *Org Design Shared Participation* step, set Type to Shared Participation.
   b) Create a new Approval step and *Launch Reorganization Mass Action* action step.
4. Set up Mass Actions.

   See Steps: Set Up Mass Actions on page 889.

Result

You can now initiate, collaborate, and review reorganization designs with Org Studio.

Next Steps

Set up Mass Action workbooks and use the Org Studio worklet to enable easy access to create, edit, and view Org Studio designs.

Related Information

Concepts

Concept: Organization Charts on page 863

Reference

Reference: Edit Tenant Setup - HCM on page 72

Reference: Edit Tenant Setup - System on page 164

Examples

Community: Importing the Excel Org Chart into Visio

Steps: Set Up Mass Actions

Context

You can set up the *Mass Actions Event* business process to generate a workbook in Worksheets for processing events in bulk.

Steps

1. Set up Drive.

   See Steps: Set Up Drive on page 411.
2. Set Up Worksheets.
3. Edit Domain Security Policies.

   Configure the *Mass Action Events* domain in the System functional area.
4. Edit Business Process Security Policies.

   Configure security permissions for the *Mass Action Event* business process policy.
5. Edit Business Processes on page 1005.

   Configure the *Mass Action Event* business process.

   The *Mass Action Event* business process doesn't support *Approval* steps.

   The *Complete Mass Action* step doesn't support constrained security groups. Workday recommends that you use an unconstrained security group or the initiator security group in the Complete Mass Action Step.

   You can share mass action worksheets with constraint security groups. However, view and edit access to mass action worksheets depends on the position and domain security settings that you apply to the profiles.
6. (Optional) Configure Rule-Based Business Processes on page 1014.

   To avoid approval routing and numerous tasks in My Tasks for mass actions, configure rule-based business process definitions for the relevant business process with the Mass Action Type report field.

Result

You can now create and share mass action workbooks for the relevant business processes.

Next Steps

Access the View All Mass Action Events report to review mass action events.

Concept: Org Studio Configurations

You can use the Maintain Org Studio Configurations task to configure the options available for these Org Studio functions:

Function	Description
Assign Roles	Configure the options for assigning roles from a worker's profile in the design. You can select the default options (as configured in the Maintain Assignable Roles task) or customize them. Example: If you configure Assign Roles to include HR Partner, you can select this role for a worker secured to an applicable security group.
Job Change	Configure the job change reasons selectable in an org design. You can select the default options (as configured in the Maintain Event Categories and Reasons task) or customize them. Example: You can configure the Reasons for Job Change to exclude change location requests.

Function	Description
Effective Dating	Configure the visibility of fields that aren't effective dated when you're using Create Org Design. By default, Org Studio displays these fields. You can configure a custom setting to hide non-effective dated fields in the design. Example: If you configure Org Studio to hide fields without effective dates, you won't be able to change Organization Assignments using Edit Org.

Committees

Steps: Set Up Committees

Context

You can track various types of committees including corporate, department, regulatory, or special subcommittees. You can maintain committee memberships and meeting details to have a complete record of committee related activity in Workday.

You can classify a committee as private to restrict access to the committee, its members, and its meetings.

Steps

1. Edit Domain Security Policies

   Configure the *Committees: View* domain to grant access for updating or viewing any committee information. You can then control access to specific committee information by combining other committee domains with the *Committees: View* domain.

   To enable access to the committee profile and Committee Member Directory for Profile report, configure the *Committees: View* and *Committees: Directory* domains.
2. Access the Maintain Committee Type task.

   Create committee types for categorization purposes, such as faculty, student, or administrative. Selecting the Search Committee check box enables you to associate search committees with job requisitions.

   Security: *Committee Definition: Set Up* domain in the Organizations and Roles functional area.
3. Access the Maintain Organization Subtypes task.

   Assign subtype levels to the committee organization type for reporting purposes. Subtypes are levels used in hierarchy-related calculated fields and in the definition of organization hierarchy structures.

   Security: *Committee Definition: Set Up* domain in the Organizations and Roles functional area.
4. (Optional) Access the Maintain Committee Classification Groups task.

   Create groups that you can use to combine similar committee classifications for greater ease of reporting and usability in Workday, such as meeting frequency.

   Security: *Committee Definition: Set Up* domain in the Organizations and Roles functional area.
5. (Optional) Access the Maintain Committee Classification task.

   Classify committee definitions to correspond with your classification groups.

   Security: *Committee Definition: Set Up* domain in the Organizations and Roles functional area.
6. Maintain Committee Definition on page 892.

   Create a committee.

7. Set Up Assignable Roles on page 904.

   Create roles for committee type organizations, and assign them to academic affiliates, admission counselors, external committee members, students, or workers.
8. Link the roles to a constrained or unconstrained role-based security group:

   See Create Role-Based Security Groups.

   Associate roles with security groups to restrict role assignee access to only the data and business process actions of their committee.
9. (Optional) Create Organization Membership Security Groups.

   Grant current members access to committee information by creating a constrained organization membership security group for the committee.
10. Set up the committee profile and add its profile report to the sponsoring organization type profile.

    See Steps: Set Up Profiles and Profile Groups on page 321.
11. Set up the Committees dashboard to combine analytics and actions for managing your committees from a single place.

    See Steps: Set Up Dashboards and Landing Pages on page 310.

Result

You can use the *com:* search prefix to limit your results to committees.

Next Steps

Workday provides a number of standard reports to help you manage committees. For a list, access Workday Standard Reports and select the *Committees* category.

Related Information

Concepts

Concept: Private Committee Access for Unconstrained Role Holders on page 897

Concept: Search Committees on page 898

Tasks

Create Organization Membership Security Groups

Maintain Committee Definition

Prerequisites

Security: *Committee Definition: Manage* domain in the Organizations and Roles functional area.

Context

Committees help your organization accomplish specialized goals. Workday enables you to organize these people for important decision making and easily record details of their meetings. The Maintain Committee Definition task enables you to create new committees and update existing committees.

Steps

1. Access the Maintain Committee Definition task.
2. As you complete the task, consider:

Option	Description
Private Committee	(Optional) Restrict committee access to roles that aren't secured to the *Committee - Public* security segment.

Option	Description
Related Job Requisition(s)	(Optional) Associate requisitions with a search committee. Search committees can have multiple job requisitions but job requisitions can only link to 1 search committee at a time.
Committee Membership Targets	(Optional) Select the target membership types and the quantity for each target type.
Sponsoring Organization	Associate role holders on a sponsoring organization of a committee with security groups to grant them access to tasks and information related to all committees the organization sponsors.
Superior Committee	(Optional) Role holders on a superior committee have access to all subordinate committees.

Steps: Set Up Committee Memberships

Prerequisites

Set up committees.

Context

You can easily track different types of members by organizing your committee memberships. Workday recommends setting up committee memberships before you:

- Find potential committee members.
- Invite people to join a committee.
- Manage committee memberships.
- Create external committee members.

Steps

1. Access the Maintain Committee Membership Type task.

   Create and track different types of committee membership, such as officers, alumni, or graduate students.

   Security: *Committee Definition: Set Up* domain in the Organizations and Roles functional area.
2. Access the Maintain Event Categories and Reasons task.

   Create categories and reasons for committee membership.

   Security: *Set Up: Staffing* domain in the Staffing functional area.
3. Create Custom Business Processes on page 1003.

   Configure these business processes and security policies in the Organizations and Roles functional area:

   - *Manage Committee Membership*
   - (Optional) *Invite Committee Candidates*

   If you have external committee members, configure security for the Create External Committee Member initiating action on the *Manage Committee Membership* business process.

4. Edit Domain Security Policies.

   Configure these domains in the Organizations and Roles functional area:

Domains	Control Access To
• *Manage: Committee Invitations* • *Self-Service: Committee Invitation*	Committee invitation tasks and data.
• (Optional) *Committee Candidates: Academic* • (Optional) *Committee Candidates: Demographic* • (Optional) *Committee Candidates: HR* • (Optional) *Committee Candidates: Talent* • (Optional) *Search: Committee Candidates*	Find Committee Candidates report.
• *Committee Membership* • *Committee Membership: Current* • *Committee Membership: Historical* • *Committee Membership: Manage* • *Committee Membership: Reporting* • *Committee Membership: Self-Service*	Committee membership tasks, reports, and profiles.
• *External Committee Member: Public Reports* • *External Committee Member: Contact Data* • *External Committee Member: Contact Information* • *External Committee Member: Photo*	View and update access to external committee member data.

   Configure these super domains, or their subdomains, in the Contact Information functional area:

Domains	Control Access To
• *Person Data: Name* • *Person Data: Personal Data* • *Self-Service: Name* • *Self-Service: Personal Data*	View and update access to external committee member personal data.

5. (Optional) Access the Edit Tenant Setup - HCM task.

   Use the ID Definition for Academic Affiliate ID and ID Definition for External Committee Member ID fields to select your own ID format definitions. Otherwise, Workday assigns unique IDs to each academic affiliate and external committee member.

   See Reference: Edit Tenant Setup - HCM.
6. (Optional) Access the Edit Tenant Setup - Notifications task.

   Configure email notifications to invitees. For the HCM parent notification type, configure E&G Committee Invitation.

   See Reference: Edit Tenant Setup - Notifications on page 107.
7. (Optional) Steps: Set Up Profiles and Profile Groups on page 321.

   Add the Committee Service and Committee Invitations reports to the committee member profiles. Add committee membership reports to the committee profile groups.

Next Steps

Configure the *End Committee Membership Service* step on the *Termination* business process in the Staffing functional area. This step enables Workday to end a committee membership automatically on the same day of a termination.

Related Information

Concepts

Concept: Notifications on page 256

Tasks

Steps: Set Up Professional Affiliations

Steps: Manage and Invite Committee Members

Prerequisites

Set up committees and committee memberships.

Context

You can assign or invite academic affiliates, admissions counselors, students, workers, and external committee members to be members of committees. When you invite committee candidates, you can monitor their responses.

Steps

1. Access the Manage Committee Membership task.

   Create new, or update existing, committee memberships. If a committee member is inactive or terminated, then you can only end their existing committee memberships.

   If you change an existing membership type, Workday ends the previous membership type 1 day before the new Effective Date. The Membership Service Start Date is the date of the initial membership type and never changes. If you specify an end date for committee membership, Workday automatically removes the member from the committee on that date.

   Security: *Manage Committee Membership* business process security policy in the Organizations and Roles functional area.
2. (Optional) Access the Create External Committee Member task.

   Add a new external committee member to Workday and assign them to a committee.

   Security: *Manage Committee Membership* business process security policy in the Organizations and Roles functional area.
3. (Optional) Access the Invite Committee Candidates task.

   When the business process completes, invitees receive a Workday notification, including attachments, and a link to the Committee Invitation Response task. Invitees can edit their responses until the invitation expires.

   Note: You can browse and invite potential committee members based on custom criteria using the Find Committee Candidates report.

   Security: *Invite Committee Candidates* business process security policy in the Organizations and Roles functional area.
4. (Optional) Access the Manage Committee Invitation Responses task.

   You can cancel or resend invitations that are pending responses.

   Security: *Manage: Committee Invitations* domain in the Organizations and Roles functional area.

5. (Optional) Edit Business Processes on page 1005.

   Add the *Manage Professional Affiliations* business process as a subprocess of the Manage Committee Membership business process.

   Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.

Result

You can assign committee members to roles on committees so they can participate in committee related tasks. The roles must be in security groups that have permission on the domains that control access to those tasks.

You can configure access for these groups to view committee membership information for their workers and affiliates.

- Academic unit role holders.
- Student cohort role holders.
- Supervisory organizations.

You can enable users to view academic units or academic unit hierarchies on the Sponsoring Organization prompt on the View Committees report by granting them access to these domains:

- *Academic Units: View*
- *Committee Definition: Reporting*
- *Set Up: Academic Structure*

You can use the ecm: search prefix to limit your search results to external committee members. To view them, users must be in an unconstrained role-based security group or have a role on the committee, its superior committee, or the sponsoring organization. The role must be in a security group with permission on the *Committees: View* and external committee member domains.

Related Information
Concepts
Concept: Notifications on page 256

Steps: Set Up Committee Meetings

Prerequisites

Set up committees.

Context

You can plan and manage committee meetings to maintain committee records, and report on recorded activity for compliance or governance purposes. You can:

- Assign and resolve action items.
- Attach documents.
- Create agenda items.
- Record votes.
- Select invitees.

Steps

1. Edit Domain Security Policies.

   Configure security for these domains in the Organizations and Roles functional area:

   - *Committee Meeting: Set Up*
   - *Committee Meeting: Manage*
   - *Manage: Committee Meeting Minutes*
   - *Committees: View*
2. Access the Maintain Committee Meeting Types task.

   Security: *Committee Meeting: Set Up* domain in the Organizations and Roles functional area.
3. (Optional) Select the Enable Educational Institution Features check box to relate committee meeting agenda items to academic appointment events.

   See Reference: Edit Tenant Setup - HCM on page 72.
4. (Optional) Access the Maintain Vote Statuses task.

   Configure vote statuses to track votes for committee meeting agenda items.

   Security: *Committee Meeting: Set Up* domain in the Staffing functional area.
5. (Optional) Access the Create Committee Meeting Template task.

   Create templates for committee meeting details and agenda items that you can use as a starting point when creating committee meetings.

   Security: *Committee Meeting: Manage* domain in the Organizations and Roles functional area.

Result

Committee role holders can access committee reports and these tasks:

- Maintain Committee Meeting to record meeting details such as date, time, invitees, and agenda items.
- Record Committee Meeting Minutes to record meeting attendees, agenda items, action items, votes, and attachments.
- Update Committee Action Items to view action items, update their completion status, and record their outcomes.

Next Steps

Create a custom report from the *Expired Committee Invitations*report data source to view committee invitations that are eligible for purge. You can purge these attachments and events when they're expired using the Purge Person Data task:

- *Committee Meeting Attachment*
- *Committee Meeting Agenda Item Attachment*
- *Committee Membership Service Event Attachment*
- *Invite Committee Candidate Event Attachment*

Concept: Private Committee Access for Unconstrained Role Holders

Private committees are accessible by:

- Committee members with self-service access.
- Roles assigned directly on the private committee.
- Unconstrained roles not restricted to public committees.

Use the Maintain Committee Definition task to classify a committee as private. Unconstrained roles can access both public and private committees until you remove the role from the private security segment.

To secure private committees, remove access to private committees on the *Committees: View* security domain policy. Create a segment-based security group for the public committee unconstrained security group and assign access rights to the *Committee - Public* security segment.

Example: Create 2 unconstrained Committee Administrator roles:

- Committee Administrator (access to both private and public committees).
- Committee Administrator – Public (has the *Committee - Public* segment assigned to restrict access to public committees only).

Concept: Search Committees

You can designate a committee as a search committee, enabling it to play an active role in recruiting. Once you link a search committee with job requisitions, you can:

- Integrate users with search committee roles into recruiting processes for associated job requisitions.
    - You must configure your recruiting domains, business process definitions, and business process security policies to include role-based security groups associated with committee roles.
- Select committee members, who are workers, as interviewees on the Schedule Interview Team task.
- Configure the Committee profile report on the Details for Job Requisition Composite View profile group.

Concept: External Committee Members

External committee members participate in committees of your organization but aren't academic affiliates, admissions counselors, students, or workers. They can be people such as:

- Board of trustees members.
- Community members.
- Local business people.

External committee members don't have positions or supervisory organization assignments, but they can hold committee roles and participate in committee related business processes. You can create expense reports for external committee members, designate them as authorized bank signatories, and record their professional affiliations.

You can use segmented security to restrict access to external committee members':

- IDs.
- Names.
- Personal information.

Related Information
Tasks
Steps: Set Up Personal Information for Multiple Person Types

Workteams

Steps: Set Up Workteams

Context

You can set up the Workteam organization type to manage worker-to-worker relationships and groups that are outside of the traditional supervisory structure. Examples:

- Cross-functional teams.
- Affinity groups.

- Employee-formed teams.
- Task forces.

Steps

1. Edit Domain Security Policies.
2. Access the Maintain Organization Subtypes task.

   Create organization subtypes that you want to use with Workteams. Example:

   - Scrum team.
   - Event team.

   Security: *Set Up: Organization* domain in the Organizations and Roles functional area.
3. Access the Create Workteam task to set up a Workteam and add members.

   Security: *Manage: Workteam* domain in the Organizations and Roles functional area.
4. (Optional) Access the Edit Workteam task to delete members and manage membership status.

   When you delete Workteam members, you delete the member's history on the Workteam permanently. To preserve member history but update participation status, change the membership status from its current state to active, inactive, or passive.

   Security: *Manage: Workteam* domain in the Organizations and Roles functional area.
5. (Optional) Access the History > Workteam Membership > Correct related action available from the History column of the Workteam grid to correct membership status and change effective dates.

   Security: *Manage: Workteam Membership History* domain in the Organizations and Roles functional area.

Result

Workers who have security permissions to Workteams enabled can update Workteams. When you grant view and modify access on the *Self-Service: Workteam* domain, users can manage their own memberships on Workteams, but they can only add other members if they have access on the *Manage: Workteam* domain.

Related Information

Reference

Reference: Organization Types and Subtypes on page 853

Reference: Workteam Domains

You can grant access to different domains to enable managers and self-service users to manage Workteam membership for themselves or others without an administrator.

Domain	Description
Manage: Workteam	Enables Workteam managers to: • Add or remove anyone from a team. • Change membership status effective immediately. • Create and edit a Workteam.
Manage: Workteam Membership History	Enables Workteam administrators to: • Add or remove anyone from a Workteam with any effective date. • Change or correct effective dates. • Change or correct membership status history.

Domain	Description
	• Create and edit a Workteam.
Self-Service: Workteam	Enables self-service users to: • Add and remove themselves from a Workteam • Change their own membership status effective immediately. To view Workteams, self-service users must also have view access on the *Manage: Workteams* domain.
Set Up: Organization	Enables administrators to set up Workteam organization subtypes.

Roles

Setup Considerations: Roles

You can use this topic to help make decisions when planning your configuration and use of roles functionality. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

A role, when combined with its role-based security groups, represents the permissions and responsibilities of an assignee for viewing, reporting, or managing data related to objects in Workday.

Business Benefits

Roles functionality in Workday enables you to:

- Control security access for objects such as organizations, service centers, and spend categories.
- Directly assign the membership of a role-based security group. You can map more than 1 security group to a role so you can configure different levels of access across a role-enabled object.
- Use Workday-delivered roles or create your own customized roles to meet your business needs.
- Configure contextual security and business process routing, reducing the number of security groups that you have to maintain.
- Grant and remove access automatically as workers fill or vacate positions.

Use Cases

Product or Feature	Example Use Cases
Financial	You can grant access to data related to specific customers or suppliers. Select based on the company that the role is assigned to. Example: Assign a role to company that enables the financial controller to access only the financial transactions and accounts related to their company.
HCM	You can configure the *Change Job* business process to route an employee transfer to the HR partner role in the proposed organization for review or approval. Example: HR partner role automatically routes transfer requests.
Pay	You can grant access to employee pay data based on the pay group the payroll partner is assigned to. Example: Enable access for payroll partners in a pay group to run pay calculations for their assigned pay groups.
Recruiting	You can specify that a worker must first be assigned to the recruiter role to then be assigned as the primary recruiter role for a job requisition. Example: • The recruiter role can view job requisitions for the supervisory organizations they support. • The primary recruiter role can modify and process candidates for the job requisitions they're assigned to.

Questions to Consider

Questions	Considerations
Do you need to limit access to data?	Consider if the data that you grant access to is contextually sensitive by organization. Determine whether the role assignee needs access to that type of information for everyone in the tenant. If not, you can restrict access to data for people they support.
Do you need to assign roles for people in different time zones?	Consider the time zone in which role-based security group assignments take effect so that workers have access to data immediately upon assuming a role.
Should the role be restricted to a single role assigner type?	Consider if the worker is in a leadership role. When a leadership role isn't restricted to a single

Questions	Considerations
	assignment, organization charts can display multiple leaders. Example: • 1 manager per supervisory organization. • 1 cost center manager per cost center.

Recommendations

- Assign a unique name for each role so you can easily identify different roles and role assignments.
- Enable roles for only 1 organization type to simplify business process routing and security access, and improve role-based report performance.

Requirements

- Configure 1 or more security groups for each role in the Assigned/Reviewed by Security Groups field on the Maintain Assignable Roles task. You can create a security group using the Create Security Group task.
- When you enable roles for a hierarchy, you must also enable them for the corresponding organization type to enable role inheritance from the hierarchy to the selected organizations. Example: Cost center hierarchy and cost center organization type.

Limitations

No impact.

Tenant Setup

The Time Zone Configuration section of the Edit Tenant Setup - System task enables you to set the time zone in which role assignments take effect based on either the:

- Assignee location.
- Tenant default.

If you leave the Role Assignment Time Zone Option blank, Workday populates the time zone as Pacific Time.

Security

To maintain role configurations, enable security for the *Set Up: Assignable Roles* domain in the Organizations and Roles functional area.

When you configure a role-based security group, you determine domain and business process security for roles. You don't configure security for the roles directly. You determine role assignees' access to data when you create role-based security groups.

Business Processes

Business Processes	Considerations
Assign Roles	You can initiate this business process when you assign roles using a related action on a worker or position. Workday initiates it as a subprocess when you configure role assignments on certain staffing events.

Business Processes	Considerations
	We recommend using the *Assign Roles - Add/ Remove* or *Assign Roles - Change Assignments* related actions to run this business process.
Assign Self-Assign Roles	For self-assign roles, when the Restricted to 'Assign Self-Assign Roles' business process is enabled on the Maintain Assignable Roles task, these business processes are used to assign the role: • *Assign Self-Assign Roles* • *Mass Assign Self-Assign Roles*

Reporting

Reports	Considerations
View Assignable Roles	You can use the View Assignable Roles report to track: • Role configurations including security groups and access rights associated with each role. • Security groups, including which can assign specific roles. You can also view which security groups can assign specific roles. This report also includes security group and access rights information associated with each role.
Security History	Displays changes to roles and security for an organization in the specified time and date range.
View Roles	Displays: • Currently assigned roles for the organization. • The inheritance status of each role.
View Role Assignment Audit History	Displays an audit trail of role assignment snapshots for the organization.
View Role Assignment History	Displays the role assignment history for the organization.
View Worker Roles Audit	Displays Workday account information, roles, user-based security groups, job-based security groups, and process-maintained roles for each worker in the organization.

Integrations

You can use the *Assign Roles* web service to support time zones for role assignments.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Concepts

Setup Considerations: Role-Based Security Groups

Concept: Security Groups

Tasks

Create Role-Based Security Groups

Set Tenant Time Zone on page 347

Reference

Role-Related Reports on page 917

Set Up Assignable Roles

Prerequisites

Security: *Set Up: Assignable Roles* domain in the Organizations and Roles functional area.

Context

Workday enables you to configure the roles that you can assign for each type of role-enabled object, providing greater security control over objects such as organizations, service centers, and spend categories.

Steps

1. Access the Maintain Assignable Roles task.
2. As you complete the task, consider:

Option	Description
Role Name	You can enter a Role Name to override the Workday Role with a name of your choice. If you can't remove the role: • Add a phrase to the Role Name. Example: *ZZZ(DO NOT USE) Buyer (for PO)*. • Clear the Assigned/Reviewed by Security Groups prompt.
Workday Role	You can only map each Workday Role selection to 1 assignable role for a specific role assigner type. Example: • The Manager role to a supervisory organization. • The Matrix Manager role to a matrix organization.
Enabled for	This determines the organization types the assignable role can be used for. Workday recommends that you only enable a role for a single role assigner type. When you enable roles for more than 1 role assigner type, it's difficult to retrieve a worker's security access and business process routing.

Option	Description
	Organization types that also have a hierarchy type must be enabled for more than 1 role assigner type. Example: Cost Centers and Cost Center Hierarchy, Company and Company Hierarchy. To ensure that role assignees inherit the correct security access, configure an assignable role for each role assigner type that's included in the hierarchy.
Default Role	Workday uses this configuration for business process routing when the role: • Has no assignees. • Is inherited from a superior organization. You can only select a role for the organization types that you specified in the Enabled for prompt. You can specify a Default Role on the Maintain Assignable Roles task. When a role is unfilled and has a default role configured on the Maintain Assignable Roles task, a worker directly assigned to the default role takes precedence over a worker who inherits the role from a superior organization. When you use people-view organization charts, Workday recommends that you configure a Default Role that's not linked to the Workday-owned Manager role. Workday also recommends that you don't select a Default Role for the role that you link to the Workday-owned manager role on a supervisory organization.
Self-Assign	You can select this check box to enable Workday to populate the role with the role maintainer's current primary position.
Restricted to 'Assign Self-Assign Roles' business process	Select this check box to: • Initiate the Assign Self-Assign Roles business process when you assign a role. • Require additional approvals when the role maintainer assigns the role
Restricted to Single Assignment	Use this check box when you want to assign multiple managers to a supervisory organization. Access the Maintain Assignable Roles task and clear the Restricted to Single Assignment check box for the Manager role. When you select this check box, you can use the Single Assignment column when a single assignment is required for integrations and reporting fields that require a single instance. When you don't specify a single

Option	Description
	worker, Workday selects the single assignment manager alphabetically.
Hide on View if Not Assigned	When you select this check box, Workday doesn't display the role on the Roles tab of an organization or on the Unassigned Roles Audit report when it's unassigned.
Is Leader / Is Supporting	Is Supporting or Is Leader must be selected for a role to view members within the organization that the role is assigned to. Workday displays roles marked as Is Leader or Is Supporting on the worker profile. Workday displays assignees of an Is Leader role as leaders on organization charts and previews. The leadership role controls the role-enabled objects visible on the My Leadership Roles report and worklet. When you assign a position to a supporting role, Workday displays the role on the My Supporting Roles report. When you select None of the Above in the Is Leader/Is Supporting prompt for a role, you must assign the *Worker Data: Public Worker Reports* domain to that role before they can view organization members. The My Organizations filter on the Organizations prompt on reports includes organizations for which the role assignment for the processing user is both: • Directly assigned (not an inherited role assignment). • Assigned to a role that is configured as Is Leader or Is Supporting in the Maintain Assignable Roles task.
Show Inherited Assignees for Security Groups	When you've assigned a role and want to display inherited assignees on the Roles tab of an organization, select a role-based security group with an Access Rights to Organization value of: • *Current Organization and All Subordinates* • *Current Organizations and Subordinates to Level* When you leave this field empty: • When the role is assigned, Workday only displays the assigned roles. • When the role isn't assigned, Workday displays inherited assignees if the assignable role is linked to at least one

Option	Description
	security group with access rights of either: • *Current Organization and Unassigned Subordinates Only* • *Current Organization and All Subordinates* • *Current Organizations and Subordinates to Level* .
Role Assignees Restricted to	When a role has any security groups in the Role Assignees Restricted to field, only members of those security groups can be assigned to that role. If you enter a constrained role-based security group in the Role Assignees Restricted to field, you can only assign roles to the members of the role-based constrained security group on the role-enabled objects they support. Workday recommends that you enable the restricted role and eligible security group for the same organization type, except for the Primary Recruiter and Recruiter roles. • For the Primary Recruiter and Recruiter roles, Workday recommends that you enable them for different organization types. Example: Primary Recruiter for Job Requisition organization type and Recruiter for Supervisory Organization organization type. You can't select these security group types in the Role Assignees Restricted to field: • *Segment Level* • *Support Compensation Level* • *Support Manager Level* • *Support Service Center (Constrained)* • *Support Service Center (Unconstrained)*
Assigned/Reviewed by Security Groups	Specify security groups whose members can approve assignments for this role. Members who display here are role maintainers. You can also restrict who can assign the role as a related action off a role-enabled object. When you use a constrained role-based security group, members of the Assigned By role can assign members of the role only within the organizations they support. Example: An HR Partner for a supervisory organization can assign a Manager, but only for the organizations they support.

Option	Description
	Roles that you don't assign to a security group aren't available: • As a related action on the role assigner. • At the *Approval* step in the role assignment business process event.

Related Information

Concepts

Concept: Roles Assignments, Positions and Role Inheritance on page 913

Concept: Role Assignments and the Snapshot Date Model on page 916

Concept: Security Groups

Roles and Time Zones

Prerequisites

- Opt-in to the Workday 32 - Time Zone functionality by accessing the Maintain Feature Opt-Ins report.
- Security: *Manage: Role Assignment Time Zone* domain in the System functional area. You can use this domain to override default time zones in role assignment tasks. It also enables you to specify a time zone when you add, remove, or change a role assignment for a worker on a task or business process.

Context

Workday enables you to configure the time zone in which role assignments become effective. A worker's time zone is determined, in order of preference, by:

- Their specified time zone.
- The time zone of the location of their primary position.
- The tenant default time zone.
- Pacific Standard Time

Steps

1. Access the Edit Tenant Setup - System task.
2. In the *Time Zone Configuration* section of the task, select one of these options from the Role Assignment Time Zone Option field:

Option	Description
Assignee Location	Workday sets the time zone based on the location of the role assignee.

Option	Description
Tenant Default	Configure this time zone for your tenant to default to when no other time zone is selected.

- If you leave the Role Assignment Time Zone Option blank, Workday populates the time zone as Pacific Time. Workday recommends configuring a time zone to avoid ambiguity in future transactions.
- When you assign a role to an unfilled position, Workday uses the location specified on the job requisition for that position. If an assignee is changing location, Workday uses the location of the effective date of the role assignment change.

Note: Once you select a Role Assignment Time Zone Option, you can't disable it.

Result

Business Processes

- Workday will use the *Tenant Default* option, if you use one of these business processes to assign roles on a role assigner:
  - Create Subordinate
  - Divide Organization
  - Job Requisition
  - Job Requisition Change
  - Manage Flex Team
  - Evergreen Requisition
  - Evergreen Requisition Change
- Workday uses the *Assignee Location* option, if you initiate the Assign Roles - Change Assignments for Worker subprocess on one of these business processes:
  - Change Job
  - End Additional Job
  - End Contingent Worker Contract
  - End International Assignment
  - Request Return from Leave of Absence
  - Request Leave of Absence
  - Evergreen Requisition Change
  - Termination

Assign Roles

- If you select the Roles > Assign Roles related action on a role-enabled business object, Workday populates the time zone with:
  - The default time zone you configured on the Edit Tenant Setup – System task when the Role Assignment Time Zone Option is *Tenant Default*.
  - The time zone of the processing user when the Role Assignment Time Zone Option is *Assignee Location*.
- If you select the Assign Roles - Add/Remove task as a related action from a worker, Workday populates the time zone with:
  - The default time zone you configured on the Edit Tenant Setup – System task when the Role Assignment Time Zone Option is *Tenant Default*.
  - The time zone of the target worker when the Role Assignment Time Zone Option is *Assignee Location*.

- If you select the Assign Roles - Add/Remove task as a related action from a position, Workday populates the time zone with:
  - The default time zone you configured on the Edit Tenant Setup – System task when the Role Assignment Time Zone Option is *Tenant Default*.
  - The time zone of the position location when the Role Assignment Time Zone Option is *Assignee Location*.
  - The time zone of the processing user when the position is unfilled and the Role Assignment Time Zone Option is *Assignee Location*.

Web Services

- When you use the EIB framework with the Assign Roles web service, and a role has multiple assignees, Workday uses the earliest time zone. If you use the framework and the Assign Roles web service with a job requisition that has multiple locations, Workday uses the earliest time zone.
- If you use one of these web services to assign roles, Workday defaults to Pacific Standard Time:
  - Create Job Requisition
  - Create Evergreen Requisition
  - Edit Job Requisition
  - Edit Evergreen Requisition

Example

Next Steps

Set Up Role-Based Security Reporting

Prerequisites

Security: *Customer Central Security Administration* and *Security Administration* domains in the Organizations and Roles functional area.

The report is available on mobile but we recommend that you view it on desktop.

Context

You can use this report to view role-based security access for workers, constrained security groups and role assigners, and identify when a worker has had their role-based security access granted, revoked or had no security impact, and for what reason. You can use it to identify when the staffing transaction has been rescinded or corrected, and for what reason. You can also use the report to view security changes between role assignments and the role assignee.

Steps

1. Access the Role-Based Security Audit Report.
2. From the prompt, fill out the relevant fields. The Effective Moment From and Effective Moment To fields are required and show one month of entries, prior to the current date, by default.
3. (Optional) Check the *Include Transactions with no Assignable Role* box. Checking the box ensures that If you hire a worker into an unfilled position with no role assignments, then this transaction only

appears in the report if the box is checked because there was no role assigned to the position at the time of hire.

- The report doesn't return entries that don't impact role-based security.
- There are no restrictions on the combinations of Role Assigner and Assignable Role values that can be selected.
- If you change the name of security group, the name updates automatically and a new entry isn't logged in the report for this change.
- Entries display for staffing transactions linked to unconstrained security groups but the report won't display direct changes to unconstrained security groups.
- The report logs entries for workers in positions and position restrictions.

4. The report displays a table of audit entries. Consider these columns:

Security Effective as of	Logs the moment the security came into effect.
Security Change Reason	The reason for the security change. If you make a security change using mass actions, this column will be empty.
Security Change Reason Details	Gives a more detailed description of the security change. • If you use the Swap Positions task to change a job, the Security Change Reason Details of the entry will display as *Change Job*. • If you use the Swap Positions task to rescind a job change, the Security Change Reason Details of the entry will display as *Swap Positions* .
Security Outcome	Displays the outcome of the security change. • A *Security Granted* entry is always logged when a new hire is created to provide a complete staffing audit trail. If the hire isn't assigned to a role-based security group during the hire, these entries display no security impact. • For every future role assignment snapshot that a worker is on, there is an entry logged as *Security Granted*. We recommend reviewing the security change reason details column in these scenarios. • When a Security Change Reason Detail impacts a role-based constrained security group, *Potential Impact* displays.
Role Assignee	• If there's no job title, the column displays the job posting. • If there's a future-dated hire, the job title displays the job posting title until the hire becomes effective. • Once a worker is terminated, all past entries revert to the job posting title. • For changes to security groups, the Role Assignee and Worker fields are empty.

Transaction	Details the staffing event. If the entry doesn't have a business process, the field will be empty. If you make a security change using mass actions, this column will be empty. Security administrators with access to the *View All* action on the business process policy of the staffing event, can click into the link in this column in the report and view if the roles have been assigned or revoked using an EIB.

Result

You have a detailed report that you can use to improve how you audit role-based security.

Example

Dylan Johnson has changed role and his security access is updated. I want to use the report to view the details for the change. I filter by name on the Worker column. I can see two *Change Job* audit entries for Dylan:

- The first entry shows me a Security Change Reason of *Job Change Vacate*, with Security Change Reason Details of *Change Job* and Security Outcome of *Security Revoked*.
- The second entry for Dylan shows me a Security Change Reason of *Job Change Fill*, with Security Change Reason Details of *Change Job* and Security Outcome of *Security Granted*.

I can see that Dylan's role has changed. His first entry shows him as a manager and the second shows him as a senior manager. His security group access has also changed on the second entry. I can see by these audit entries that Dylan has changed job from a manager to a senior manager role.

Next Steps

Edit Role Assignment Permissions

Prerequisites

Security: *Security Administration* domain in the System functional area.

Context

This task enables you to control who is allowed to:

- Assign roles to organizations.
- Assign roles to positions within an organization.

You can also use the Maintain Assignable Roles task to assign roles.

Steps

1. Access the Edit Role Assignment Permissions task and specify the Role to edit.
2. Select a security group from the Administered by Security Groups prompt.

   Members of the specified security group can edit positions assigned to this role, and add a role to an organization.

Related Information

Concepts

Concept: Role Assignments and the Snapshot Date Model on page 916

Concept: Roles Assignments, Positions and Role Inheritance

Roles are groupings of people with specific permissions and responsibilities. Example: Manager, recruiter, and HR partner. Roles enable security control for objects such as organizations, service centers, and spend categories.

- A role assigner is a business object that you assign a role to. It's also called a role-enabled object.
- A role assignee is a person, worker, position, or position restriction assigned to a role.
- A role assignment is the combination of a role assigner and a role.
- A role maintainer manages and assigns roles. They assign a role assignee to a role assigner.

To make a role assignable, you must configure at least 1 security group in the Assigned/Reviewed by Security Groups field on the Maintain Assignable Roles task. To assign the role, you must be a member of at least 1 security group listed in the Assigned/Reviewed by Security Groups field. Any member listed in the security group is a role maintainer and ensures that authorized members approve each role assignment. When you don't configure a security group for a role, Workday marks the role as inactive and doesn't display it in the Role section of the worker profile. See Set Up Assignable Roles.

In the Maintain Assignable Roles task, Workday delivers Workday Roles that you can map to a relevant role assigner type. Example:

- *HR Partner*, when mapped to a relevant role assigner type, has full initiation and approval capabilities.
- *HR Business Partner*, when mapped to a relevant role assigner type, has some rights for initiation, but less rights for modifying data.

Note: To inactivate a role with existing assignments, you must remove the existing assignments before you remove all the security groups. If you remove the security groups before removing the existing assignments, you can't approve the removal of the existing role assignments later.

Consider these methods when you're assigning roles:

Method	Description
Role assignment as a related action on a role-enabled object	When you assign roles from a related action on a role-enabled object, you only see roles that you have permission to assign. There's no business process event created for the role assignment to approve. When you save, the role assignment takes effect according to the effective date.
Role assignment as a subprocess of a staffing event	The Assign Roles business process is available as a subprocess on these staffing events: • Change Job • End Contingent Worker Contract • End Additional Job • End International Assignment • Inactivate Service Center Representative • Request Leave of Absence • Request Return from Leave of Absence • Termination

Method	Description
	Workday recommends that you configure these staffing events to use the *Assign Roles - Change Assignment for Worker* subprocess rather than the *Assign Roles to Worker* subprocess when both actions are available. You can automatically populate the old and new positions in Assignees to Add and Assignees to Remove with these options: • Copy role assignments. • Remove role assignments. • Transfer role assignments. If you rescind or correct the parent staffing business process, Workday doesn't automatically rescind or correct the role assignments in the subprocess. Workday reflects the changes in a worker's profile only if the overall status of the Assign Roles business process is completed.
Role assignment as a related action on a worker, position, or position restriction	You can assign roles by accessing these tasks from the related actions menu of a worker, position, or position restriction: • Security Profile > Assign Roles - Add/ Remove • Security Profile > Assign Roles - Change Assignments When you select Security Profile > Assign Roles - Add/Remove from the related actions menu of a worker, Workday only displays roles that the worker is eligible for in the Roles prompt. It doesn't display the roles the user has permission to assign.
When you create a role-enabled object	You can assign roles directly to a role-enabled business object by selecting Roles > Assign Roles from the related actions menu. You use the Maintain Assignable Roles task to configure all of your assignable roles.
EIB with the *Assign Roles* web service	The *Assign Roles* web service supports time zones for role assignments. You can configure security by selecting Business Process Policy > Edit from the related actions menu of the *Assign Roles* business process.
Assign Self-Assign Roles business process	When you enable Restricted to 'Assign Self-Assign Roles' business process for a self-assign role on the Maintain Assignable Roles task, Workday uses these business processes to assign the role: • *Assign Self-Assign Roles* • *Mass Assign Self-Assign Roles*

Method	Description
	You can configure these business process definitions with the appropriate *Approval* steps.

Workday initiates the *Assign Roles* business process when you assign roles using a related action on a worker or position, or a subprocess. You can't rescind a role assignment that you complete as part of a business process event. The Workday-delivered *Review Changed Role Assignments Action* step automatically routes to the role maintainer for the role-enabled object where the role is assigned. You can't remove this step from the business process definition.

Example: You're a Compensation Administrator with permission to initiate the *Assign Roles* business process. You can use the business process to assign the Compensation Partner role to a worker or to propose any role assignment for a worker.

- When you're assigned a security group in the column of the Maintain Assignable Roles task for the Compensation Partner role, the business process routes the review step to your Your Tasks for your approval.
- When you propose roles that you don't have permission to assign, Workday determines which security group is the role maintainer for each proposed role. Workday routes the *Review Changed Role Assignments Action* step to the members of all relevant security groups for approval.

If a role has been configured for an *Approval* step, the business process routes to the role-based security group of the role-enabled object of the position assigned to the role. Workday recommends that role assigner types that aren't assigned to a worker position from a staffing transaction aren't configured for an *Approval* step because the step will go unassigned. Example: Project or Spend Category.

Note: Audit entries are created in Workday each time a change is made to an instance. In the case of role assignments, this can be a worker. An audit entry is created when a change is approved and the approver will display in the audit trail for the worker.

Note: When you assign a restricted role using the *Assign Roles* business process or the *Assign Roles - Change Assignments* subprocess, Workday only displays workers that are eligible for the role in the Assign To prompt based on the restrictions you set.

Positions and Workers

In a position management staffing model, assignable roles enable you to move a worker's role automatically when you change their position. When you assign a role to a position, the role is associated with that position. When a worker changes positions, they don't retain roles associated with their previous position. When you hire a worker into an open position, the worker gains all roles associated with that position.

Workday assigns business processes routing to workers based on their assigned roles. You can add roles to a business process by including the appropriate role-based security groups to the business process security policy.

When role assignments are used in downstream integrations, we recommend selecting a reorganization effective date that's after the position availability date.

Staffing Models and Positions

In the job management staffing model, whenever you assign a role to a job, a worker always fills the job. When you terminate a worker, Workday:

- Inactivates the job.
- No longer assigns the job to any roles.
- Removes the security access that the job or job restriction gave the worker.

We recommend using an unconstrained security group when using the job management staffing model.

In the position management staffing model, when you terminate a worker and leave the position open, the position is unfilled but Workday still applies the position or position restriction to the role.

The position will still be displayed in the Role Assignment Audit History report for both staffing models unless the position is closed.

Role Inheritance

Workday recommends that you assign roles to the highest level and configure role inheritance wherever possible to improve performance.

Subordinate organizations inherit role assignments when you set the Access Rights to Organizations of the security group for the role to:

- *Applies to Current Organization and All Subordinates*.
- *Applies to Current Organization and Subordinates to Level*.
- *Applies to Current Organization and Unassigned Subordinates*, when you don't assign a role to the subordinate organization.

When an organization without a role assignment inherits a role assignee, Workday searches for the role assignment on a superior organization. When the role isn’t assigned on any superior organization, Workday unassigns any business process tasks routed to the role-based security group.

You can assign a role to any level in a hierarchy, or you can configure the level to inherit a role from the superior organization. You can't assign a role to a level in a hierarchy and you can't inherit a role from a superior organization until you link that role to a role-based security group with access rights other than Current Only.

Workday doesn't display role inheritance when:

- You set the Access Rights to Organizations of all the role-based security groups to *Applies to Current Organization Only*.
- The role isn't linked to any role-based security groups.

There's a discrepancy between the Get Workers web service and the UI task and the web service doesn't take the access rights into account.

Related Information

Concepts

Concept: Superior and Subordinate Organizations on page 872

Tasks

Set Up Assignable Roles on page 904

Reference

Reference: Workday-Delivered Security Groups

Concept: Role Assignments and the Snapshot Date Model

Role assignments use snapshots to capture the role assignees that are effective as of a particular date. When you enter role assignments in date order, each effective date is a snapshot view of the role assignees for your role assignments. A snapshot is updated if a role assignee is removed as of the effective date.

When you enter roles out-of-date order and back-date the Effective Date field, you should add the roles to all later-dated snapshots as well.

- To automatically update later-dated snapshots with changed role assignments, select the Update Later-Dated Assignments check box on the *Assign Roles - Add/Remove* and *Assign Roles - Change Assignments* actions.
- You must have access to the *Roles: Manage* domain to select this check box.

When you use the *Assign Roles* related action or a subprocess to enter role assignments, you must update future snapshots manually.

Example: Dave is added with a back-dated Effective Date.

Date Entered	Effective Date	Workers Added
2021-01-03	2021-01-03	+Cynthia +Kim
2021-01-03	2020-01-28	+Dave
2021-01-10	2021-01-10	+Amy Cynthia Kim

Dave has the role between 2020-01-28 to 2021-01-02 only. To ensure that Dave has the role until 2021-01-15, you must add Dave to the role twice: effective as of 2021-01-03, and effective as of 2021-01-10.

Date Entered	Effective Date	Workers Added
2021-01-03	2021-01-03	+Cynthia +Kim
2021-01-03	2020-01-28	+Dave
2021-01-10	2021-01-10	+Amy Cynthia Kim
2021-01-15	2021-01-03	+Dave Cynthia Kim
2021-01-15	2021-01-10	+Dave Amy Cynthia Kim

Related Information

Tasks

Create Role-Based Security Groups

Reference

Reference: Security-Related Reports

Reference: Edit Tenant Setup - System on page 164

Reference: Staffing Model Comparisons

Role-Related Reports

Workday delivers a number of reports and report data sources to give you insight into available roles and role assignments. Some reports provide role information specific to your particular roles.

Reports

Report	Description
My Leadership Roles	View the leadership roles assigned to your position. Also displays you on the organization chart as the leader of any organizations for which your position has a leadership role. The My Organizations filter on the Organizations prompt on reports includes organizations for which the role assignment for the processing user is both: • Directly assigned (not an inherited role assignment). • Assigned to a role that is configured as Is Leader or Is Supporting in the Maintain Assignable Roles task.
My Supporting Roles	View the supporting roles assigned to your position. The My Organizations filter on the Organizations prompt on reports includes organizations for which the role assignment for the processing user is both: • Directly assigned (not an inherited role assignment). • Assigned to a role that is configured as Is Leader or Is Supporting in the Maintain Assignable Roles task.
Role Assignments for Worker Position	Displays an overview of *assignable roles*, security group membership, and access rights for the specified worker. Includes whether the role is inherited or directly assigned, and whether the role is active or inactive. You can limit results to specific roles, and filter out inactive organizations and inherited role assignments. If you enable time zones on role assignments, this report prompts you for an effective time zone, and the effective moment that Workday retrieves the role assignments.
Role Assignment Permissions	Displays the security group whose members can administer each role. Enables you to view or edit the security groups that you can assign workers to each assignable role.
Roles for Organizations and Subordinates	Displays the organization hierarchy of subordinate organizations. Select an organization in the hierarchy to see all the assignable roles, the worker in each, and whether they fill that role by assignment. If you enable time zones on role assignments, this report prompts you for an effective time zone and displays the effective moment that Workday retrieves the role assignments.

Report	Description
Security History	Displays changes to roles and security for an organization in the specified time and date range.
Security History for User	Displays all security transactions for a user for the selected time and date range. Details include additions and removals for security groups over time.
Role-Based Security Audit	Displays role-based security access. It shows the security impact of the Hire, Job Change and Termination staffing transactions.
Unassigned Roles Audit	Displays roles with no assigned positions. Details include the organization type, unassigned roles, and the minimum roles to assign.
Unassigned Organization Roles Audit	Displays roles by organization with no positions assigned. Details include the organization type, unassigned roles, and the minimum roles to assign to each role.
Unfilled Assigned Roles Audit	Displays roles assigned to unfilled positions. You can include or exclude inactive roles in the results.
Duplicate Role Assignments	Displays role assigners with duplicate role assignments.
View Assignable Roles	Displays an overview of all assignable roles, including the types of organizations that are role-enabled, the default role, and whether it's restricted to single assignment, hidden if not assigned, or a leadership role. You can also see which security groups can assign specific roles. This report also includes security group and access right information associated with each role.
Role Assignment Audit History	Displays an audit trail of role assignment snapshots in chronological order. To get a complete history of role assignments, use this report in combination with the Security History and Security History for User reports.
Role Assignment History	Displays assignable roles, when they were assigned, and the workers to whom they were assigned. When you configure the *Role Assignment Time Zone Option* on the Edit Tenant Setup – System task, it displays the processing user's time zone on the Role Assignment History tab of the Role Assignment History report.
Role Assignment Snapshots for Role Assignees	If you're experiencing performance issues, this report will help to determine which role assignments are creating the biggest problems related to security evaluation. Rolees with no snapshots won't display in the Role Assignment Snapshots for Role Assignee report.

Report	Description
	Note that performance problems can occur when the sum of the "Total Snapshot Count for Role Assignment" for all rows is greater than 100,000.
Role Assignees with Highest Role Assignment Snapshot Volume	Helps to identify role assignees with the highest number of role assignment snapshots. It displays the top position IDs to use in the Role Assignment Snapshots for Role Assignee report. It helps to determine whether a high-volume of role assignments is causing performance issues.
Worker Roles Audit	Displays the workers in a specified organization and any assignable roles, user-based or job-based security groups, or process-maintained roles to which they belong.

Custom Report Fields

You can build a custom report using these report fields:

- Inherited Role Assignments: Returns inherited role assignees based on the access rights of the security group. Doesn't include default role assignments or role assignments that are directly assigned.
- Role Assigned to Workers: Returns workers assigned to specified roles, including directly assigned, inherited, or default role assignments.
- Unassigned Organization Roles: Returns the organization roles that are unfilled for an organization. A role is considered unfilled if it isn't directly assigned and isn't inherited.

Report Data Sources

Some report data sources that you can use to report on roles include:

- Assignable Roles
- Role-enabled instances
- Role Based Security Audit Log Lite
- Security History for Organization
- Security History for User

Related Information
Reference
2020R2 What's New Post: Role Assignment Audit History

Locations

Setup Considerations: Locations and Location Hierarchies

You can use this topic to help make decisions when planning your configuration and use of locations and location hierarchies. It explains:

- Why to set them up.
- How they fit into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.

- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Locations and location hierarchies are geographic attributes of Workday objects.

Business Benefits

Locations enable you to define, track, and report on the geographic attributes of Workday objects. Examples:

- Time zones and locales so that workers automatically inherit those attributes.
- Addresses and coordinates for workers and business assets.
- Geographic regions for job postings and interviews.
- Classroom locations, features, and capacities.
- Workspaces and building assets.

Locations roll up to location hierarchies, which are organization types. You must set up locations, but setting up location hierarchies is optional.

Locations extend your ability to manage and report on business facilities, equipment, and the workers who use them. You can set up location usages and identify location assets. Examples:

- Indicate standard work hours for employees.
- Provide contact and shipping information.
- Manage the organizations and positions assigned to locations.
- Track and assign resources and spaces.

Location hierarchies make reporting on locations and the objects assigned to them easier. Examples:

- Assign security by location.
- Report on groups of locations by hierarchy instead of manually selecting individual locations.
- Build condition rules based on location hierarchy to improve efficiency and reduce maintenance.

Use Cases

The use cases for locations vary depending on the products that you configure in your tenant and the features that you use.

Product or Feature	Use Case
Business Processes	You need to provide different onboarding documents for employees in different states. Locations enable you to use a condition rule that ensures you include all required locations in this business process. You can create a location hierarchy to use in a condition rule for each state to avoid making future updates when you create new locations.
Financial	You can: • Define location hierarchies based on regulatory regions. • Set up locations for geographical financial reporting if physical locations align with financial reporting requirements.

Product or Feature	Use Case
	• Configure storage locations for shipping goods and services for procurement.
HCM	To set up local HR support for a global company, you can: • Define a location for each building where workers work. • Define a global location hierarchy to group locations. Example: By city, state, country, and continent.
Payroll	You can restrict schedules and wages based on local regulations.
Recruiting	You can enable: • Recruiters to access reports and tasks for candidates and available jobs based on city, region, and country. • Job candidates to search for jobs based on locations.
Reporting	To report on all locations in a region, you can configure the region as the location hierarchy instead of selecting individual locations.
Security	You have HR partners assigned by superior organization but there are workers in different countries within the same organization. You can create separate local HR partner roles and assign them to each location hierarchy based on country. Then you can assign security based on the intersection of the groups so that HR partners only see workers that they support.
Student	You can: • Track and report on usages and schedules. • Enable instructors to select classrooms based on attributes like physical location, capacity, ADA compliance, and equipment.

Questions to Consider

Questions	Considerations
Do you require security at location level?	Workday recommends setting up location hierarchies. The first level should be a one-to-one mapping to each physical location. The second level can group each location into logical groups that can roll up to the global level.
Do you need to track details about your locations?	Build a hierarchy within the location. Example: Building, floor, space number.
Does your company have compliance audit requirements (Example: EEO)?	If so, you must use establishments along with the locations.

Questions	Considerations
Do you have remote workers, workers who report to multiple locations, or who report to client locations?	When you have workers assigned to remote sites, consider the implications of assigning them to physical locations. Instead you can group them into designated locations by state, province, or other logical designation. For payroll, consider grouping workers by tax jurisdiction.
How do you plan to name your locations?	Select your naming conventions carefully and consider external audiences. • Location names should make sense to internal and external end users. • For large organizations or many locations, consider sort order for drop-down lists. • Create location names that are easy to understand because external users use them for purchase orders, job requisitions, and deliveries.
Do you require location hierarchies?	Location hierarchies are optional. You can include a location in more than 1 hierarchy as long as the locations don't roll up to the same parent.

Recommendations

- Consider your location usage and its relationship to physical addresses when defining locations.
- Base your location hierarchies on geographic location, not sales territory or region of responsibility.
- Workday recommends that you configure the *Location: View* domain to inherit parent permissions.

Requirements

Enable the organizations and roles functional area. You must configure locations because they control other functions throughout Workday.

Limitations

You can't:

- Assign roles to locations. Instead, assign roles to location hierarchies.
- Define organization assignments on locations. Instead define organization assignments on location hierarchies.
- Use business processes to create locations.

Tenant Setup

Organization subtypes are tenant-wide and determine which subtypes you can use for location hierarchies.

Security

These domains in the Organizations and Roles functional area:

Domain	Considerations
Location: View	Grants access to view a subset of location details.

Domain	Considerations
	Workday recommends that you configure this domain to inherit parent permissions. Organization subtypes are tenant-wide and determine which subtypes you can use for location hierarchies.
Manage: Location	• You must have modify access to create or maintain locations. Example: Organization administrators and implementers security groups. • Grant view access to any security groups that need to see details about locations. Example: Contingent workers, all employees, and auditor security groups.
Manage: Location Hierarchy	• You must have modify access to create or maintain location hierarchies. Example: Organization administrators and implementers security groups. • Grant view access to auditor security groups.
Set Up: Organization	Enables you to maintain the list of organization types and subtypes.

Business Processes

You can't create locations or location hierarchies using business processes. However, location hierarchies are an organization type, so you can use reorganization business process types for these location-related tasks:

- Divide Organization
- Create Subordinate
- Change Visibility
- Assign Superior

Locations and location hierarchies are cross functional and used throughout Workday in different ways.

Reporting

When you set up locations and location hierarchies, consider how they'll be used in reports. Locations and location hierarchies are displayed in several Workday-delivered reports. Examples:

- Find Jobs for External Career Sites
- Find Jobs for Internal Career Sites
- Audit: Worksite Discrepancies for Company
- Multiple Worksite Report by Company

Integrations

If you have inbound integrations that create or update locations, make sure that the integration uses the same naming conventions and that it inserts new locations into the appropriate location hierarchy.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Locations control many other functions throughout Workday. Examples:

- Standard work hours for employees.
- Contact and shipping information.
- Tax jurisdictions for payroll.

Related Information
Tasks
Create Business Process Condition Rules on page 1011
Steps: Set Up Establishments
Steps: Set Up Instructional Locations

Create Locations

Prerequisites

Configure location settings on these tasks:

- Maintain Location Attributes
- Maintain Location Types
- Maintain Work Space Levels

Security: *Manage: Location* domain in the Organizations and Roles functional area.

Context

Locations enable you to track business assets and work spaces. See Concept: Location and Location Hierarchies and Setup Considerations: Hierarchies.

Steps

1. Access the Create Location task. See Reference: Location Usages for location usages.
2. As you complete the Details tab, consider:

Option	Description
Location Type	Select the appropriate based on your configuration of the Maintain Location Types task.
Location Attributes	Select the attributes associated with the location. Example: If the usage is *Instructional*, you can assign the most suitable locations to course sections.
Superior Location	This location becomes subordinate to a location you select.

   There's no limit on what codes you can use in the Location Identifier field but we recommend that you select codes that can integrate easily with other systems.
3. As you complete the Contact Information tab, consider:

Option	Description
Address	When you want to use this location on a job requisition, the location effective date must

Option	Description
	be on or before the recruiting date of the job requisition.

There's no limit to the numbers of addresses for a single location but too many may cause performance issues. We recommend using a location hierarchy in cases where there are a lot of addresses on one location. Example: A location has multiple buildings in a city. The top level business site location would be the town or city and each building would be a subordinate business site location. Each floor of each building would be a subordinate location of the building business site location.

4. (Optional) If you've chosen the Business Site option for location usages, consider these options as you complete the Business Site tab:

Option	Description
Time Zone	Displays the time zones that Workday has marked as default or that you set up on the Configure Preferred Time Zones task. Use the Configure Preferred Time Zones task to add time zones that are missing from: • Time zone prompts for business sites. • Report fields that return location time zones. When you don't select a time zone, Workday uses the time zone you set up on the Edit Tenant Setup - System task.
External Name	Enter a primary job location that displays on a job posting on an external career site.
Default Job Posting Location	Defines the location for the job posting and consolidates job postings on the Find Jobs report under 1 location facet. Populates the Primary Job Posting Location field on these tasks: • Create Job Requisition • Edit Job Requisition • Create Evergreen Requisition • Edit Evergreen Requisition
Multiple Worksite Reporting (US Locations Only)	Trade Name: If your company doesn't require a trade name, you can enter any placeholder text to fulfill the requirement. Worksite ID Code: The code must be unique for each location in each state. The codes can be the same for a location that's used by multiple companies. The character limit for the code is 21 alphanumeric characters.

5. (Optional) If you've chosen the Ship-To option for location usages, you can use the Associated Deliver-To Locations tab to specify delivery locations and associate location hierarchies.
6. (Optional) If you've selected the Instructional location usage, use the Instructional tab to create locations for course and activity instruction. See Create Instructional Locations.

Example

At Global Modern Services Singapore, workers who perform a global search have to sort through search results that include company locations in other countries. Betty Liu wants workers to see only company locations and location hierarchies for these Singapore company locations:

- Singapore
- Bedok
- Roa Payoh
- Choa Chu Kang

Betty must:

1. Create a location hierarchy that includes the Singapore company locations.
2. Create organization membership security groups.
3. Add the organization membership security groups to the *View: Location* domain.

When workers at Global Modern Services Singapore perform global searches, they see only Singapore company locations.

Next Steps

Assign locations to workers and positions. You can assign a location to a location hierarchy by selecting Reorganization > Assign Location and create a new reorganization event or use an existing one.

Use the Edit Location report to edit your locations.

Related Information
Tasks
Steps: Multiple Worksite Reporting (USA)
Set Up Company Taxes by Location (USA)

Create Location Hierarchies

Prerequisites

Security: *Manage: Location Hierarchy* domain in the Organizations and Roles functional area.

Context

You can use location hierarchies to assign roles and define geographical regions for regulatory reporting. Example: You create a location hierarchy for Ireland and configure Dublin, Cork and Galway as subordinate locations. The Ireland location hierarchy is a subordinate of the EMEA location hierarchy.

Steps

1. Access the Create Location Hierarchy task to create a top-level location hierarchy.
2. As you complete the task, consider:

Option	Description
Name	Workday creates an effective date for the name when you create a location hierarchy. You can change the name and apply effective dating by selecting Organization > Edit Name from the related actions menu of the organization.

Option	Description
Visibility	When determining who can view an organization, Workday prioritizes organization visibility over the access rights of the worker's role-based security group.

3. (Optional) Specify which organizations that you can assign to a worker's position restriction for the location on the Organization Assignments tab. You should assign organizations to the lowest level of a hierarchy so that locations on that hierarchy inherit the assignments.

Next Steps

Access the View Organization report to view the locations in your location hierarchy. You can create a subordinate of a location hierarchy by selecting Reorganization > Create Subordinate from the related actions menu of the hierarchy.

Access the Maintain Organization Subtypes task to edit or create location hierarchy subtypes.

Related Information

Tasks

Add Organizations to Hierarchies on page 939

Set Up Supervisory Organizations on page 840

Reference

Reference: Hierarchies on page 941

Concept: Locations and Location Hierarchies

When you configure locations and location hierarchies, you can:

- Assign locations to supervisory organizations.
- Assign roles at the location hierarchy level.
- Designate geographical areas within a location.
- Specify a location on a job or a position restriction.

Locations

Locations are similar to organizations. You can:

- Set up locations with a hierarchical structure without including them in a location hierarchy.
- Create work space levels to give you more control over how you track the location of a worker or business asset. Work space levels are hierarchical and must roll up to a location marked as a Business Site.
- Use locations to set default item such as data values, date formats, and time zones.

Location Hierarchies

A location hierarchy is an ordered structure of locations. Workday automatically includes workers as members of location hierarchies when the hierarchy includes the location of their position. You can:

- Assign roles on a location hierarchy.
- Use location hierarchies to define geographical regions for regulatory reporting.

Example: You create a location hierarchy for California and configure San Francisco, Los Angeles, and San Diego as subordinate locations. The California location hierarchy is a subordinate of the Western U.S. location hierarchy.

Worker Locations

A worker's location is an attribute of their position or job. A worker's location must be a business site or subordinate to a business site. You can use a worker's location in eligibility rules and intersection security groups.

Work Spaces

Work spaces are specific locations, such as a desk, office, or cubicle, related to each worker's position. You can create work spaces as part of a location hierarchy. A work space must be subordinate to another location within a location hierarchy. You can access the Maintain Localization Settings task to enable, hide, or require this prompt according to country-specific settings.

Related Information

Concepts

Concept: Security Groups

Tasks

Create Organization Hierarchies on page 937

Maintain Localization Settings

Reference: Location Usages

Setting up locations and location usages extends your ability to manage and report on business facilities, equipment, and the people who use them. Location usages determine which location attributes are available for you to configure.

When you create a location, you can select these location usages:

Usage	Functional Areas	Examples
Business Asset	Financial	The physical location where you store an asset or where it's in use.
Business Site	• Financial • HCM	The physical location of a business. For business site locations you can: • Assign workers. • Configure time zones. • Define work hours. • Manage organizations and positions. • Provide contact information. • Track and assign resources. Workday determines the currency and language based on the business site location usage. Business sites must include: • *Address.* • *Time Profile.*

Usage	Functional Areas	Examples
		You can't simultaneously use business sites as: • Job posting locations. • Off-site recruiting locations. • Training rooms. • Work spaces.
Campus	Student	The physical grounds and buildings at a location for your academic institution. You can't set up a location as a campus and an instructional site simultaneously.
Housing	Student	A residential site for students. You can view and report on housing data within Workday or build integrations with Workday and your current housing software. Must include an *Academic Unit*.
Instructional	Student	A location in which learning events like classes, activities, and assessments take place. Example: • Classroom. • Lecture hall. • Lab. Must include: • *Owning Organization* • *Capacity* You can't set up a location as an instructional site and a campus simultaneously.
Inventory	• Financial • Procurement • Supply chain management	A location where you stock inventory or a group of stocking locations that you manage as a unit. Example: You set up a warehouse as an inventory location and designate a large aisle as a stocking location to store goods. You can't set up a location as an inventory location and a par location simultaneously.

Usage	Functional Areas	Examples
Job Posting	HCM	A job-posting location where you don't have an existing business site. Must include an address. You can't set up a location as a job-posting site and a business site simultaneously.
Off-Site Recruiting	• Financial • HCM	External locations that are typically temporary, such as hotels or convention centers, where you can host recruiting events. You can set a date to inactivate the location when it's no longer needed. You can't set up a location as an off-site recruiting site and a business site simultaneously.
Par	• Financial • Procurement • Supply chain management	A location where you can manage periodic inventory. Example: Cabinets or storage carts. Must include an address. You can't set up a location as a par location and an inventory location simultaneously.
Payroll Tax	• HCM • PAY	Location where you tax multistate workers according to each location where they work. If your location is a payroll tax site, you must enter additional information. Must include at least 1 *Location Mapping*.
Ship-To	• Financial • Procurement • Supply chain management	Shipping locations used to associate ship-to addresses with deliver-to locations. Must include an address.
Training Room	HCM	A reusable room at a business site for instructor-led classroom training lessons in learning courses. When adding training rooms, you must select a business site as the Superior Location. You can't set up a location as a training room and a business site simultaneously.
Work Space	HCM	Spaces within a business site or another work space. Example: Building, floor, cubicle, or desk.

Usage	Functional Areas	Examples
		Work space locations can't be a top-level location. Work spaces must be subordinates of a work space or business site. You can't set up a location as a work space and a business site simultaneously. To remove a work space as a location usage, you should inactivate the location and create a new one.
~Extended Enterprise Affiliation~	HCM	A location that you can use to: • Assign workers to roles that manage and report on specific affiliations. • Establish hierarchies within affiliations. • Group extended enterprise learners.

Related Information

Tasks

Create Locations on page 925

Steps: Maintain and View Student Housing Assignments

Steps: Set Up Extended Enterprise Affiliations

Steps: Set Up External Career Sites

Steps: Set Up Instructional Locations

Steps: Set Up Inventory Locations

Steps: Set Up Learning

Steps: Set Up Par Locations

Steps: Set Up Asset Tracking

Hierarchies

Setup Considerations: Hierarchies

You can use this topic to help make decisions when planning your configuration and use of hierarchies. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Using hierarchies, Workday establishes parent-child relationships or reporting relationships between organizations. Hierarchies are structural attributes of Workday objects, but they don't store definitions of individual objects, such as positions, workers, or accounts. Along with organizations and roles, hierarchies are part of the foundation that provides configurable and contextual security within Workday. The way that you structure your hierarchies influences many important Workday functions, especially role assignments, planning, and reporting.

Business Benefits

Hierarchies are designed to evolve as your company, business needs, and locations grow. Setting up hierarchies helps streamline business process routing, security, analysis, and reporting. You don't assign hierarchies to workers. The hierarchies are inherited from the worker's organization. You can configure security so that subordinates of a role at a higher level in a hierarchy automatically inherit the role, which eliminates additional configuration as your organization grows. You can set up hierarchies so that subordinate hierarchies automatically inherit business processes from parent hierarchies, but you can also configure unique processes for any subordinate.

Hierarchies don't always indicate a subordinate relationship. In many instances, setting up hierarchies simply groups entities and enables you to eliminate redundant steps. Example: Instead of assigning roles individually, you can assign roles once at a higher level and organizations that are included in that hierarchy can inherit the role assignments.

Use Cases

Workday has 2 types of hierarchies, superior-subordinate and roll-up. Superior-subordinate hierarchies define the common organizational structures. Example: Management chains. Roll-up hierarchies support multidimensional reporting and are typically used for grouping and reporting. Example: District > Stores.

These organization types have a corresponding hierarchy in Workday. Example: Academic Unit has a corresponding Academic Unit Hierarchy:

- Academic Unit
- Business Unit
- Company
- Cost Center
- Fund
- Gift
- Grant
- Location
- Program
- Project
- Region

Product or Feature	Use Case
Academic units.	Create academic unit hierarchies to: • Support roll-up reporting. • Enable academic appointment business processes. • Provide for business process and role inheritance.
Funds for education and government.	Group related funds into hierarchies to: • Define which roles can view fund details. • Easily navigate between related awards.

Product or Feature	Use Case
	• Generate reports on grouped funds.
Grants.	Group related grants into hierarchies to: • Enhance reporting. • Route grants for approval. • Assign roles to grants.
Locations for financial management.	Set up location hierarchies to: • Align physical locations with geographical reporting requirements. • Assign storage locations for shipping goods and for procuring services. • Match locations with regulatory regions.
Management-level hierarchies for Human Capital Management (HCM).	Set up management level hierarchies to: • Categorize job profiles based on management types. • Compare similar roles across an organization.
Project hierarchies for financial management.	Configure project hierarchies to: • Streamline project creation by eliminating manual configuration steps. • Generate detailed reports that enable you to compare costs, revenue, time, and progress for projects.
Spend category hierarchies.	Create spend category hierarchies to: • Simplify procurement and expense searches. • Generate reports and complete analysis. • Model spend categories based on industry standard taxonomies.

Questions to Consider

Questions	Considerations
Would your company benefit by grouping office locations geographically for reporting, financial, or regulatory purposes?	If you need to assign roles by location, set up location hierarchies. The first level should be a one-to-one mapping of location hierarchy to each physical location. The second level can group each location into logical groups that can roll up to the global level.
Would your organization benefit from having a consistent automatically applied organizational hierarchy?	Configure your organization hierarchies so that: • Subordinates of a role at a higher level in a hierarchy automatically inherit the role. • Subordinate hierarchies automatically inherit business processes from parent hierarchies.

Questions	Considerations
	• You can also set up unique processes for any subordinate hierarchy in instances in which inherited processed aren't relevant.
Does your company have locations in more than 1 country?	Consider setting up company hierarchies and virtual plan hierarchies to plan for and report on transactions in multiple currencies across subordinate companies.

Recommendations

Use these calculated fields to work with data in your tenant:

- Lookup Hierarchy: Displays data with a hierarchical structure and the hierarchy node in a single instance.
- Lookup Hierarchy Rollup: Displays hierarchical data for analysis.

Use these search prefixes in prompts and global searches:

- cch: For cost center hierarchies.
- loch: For location hierarchies.

Requirements

No impact.

Limitations

- Organizations can’t roll up to more than 1 hierarchy if they eventually roll up to a common hierarchy because the organizations would then be counted more than once.
- When a hierarchy structure is in effect, you can only create subordinate organizations of subtypes that are valid within the hierarchy structure.

Tenant Setup

You can set access restrictions for organization hierarchies by selecting Restrict Org Hierarchical Prompt to Visibility > Everyone on the Edit Tenant Setup - System task. When you select this check box, the *Active Organizations by Hierarchy* option on organization prompts display only hierarchies with visibility of everyone.

Security

Configure at least one of these domains:

Domains	Considerations
Business Process Administration in the System functional area.	Enables you to edit the *Create Project Hierarchy* business process.
Create: Company in the Organizations and Roles functional area.	Enables you to create companies and company hierarchies.
Create: Cost Center in the Organizations and Roles functional area.	Enables you to create cost centers and cost center hierarchies.
Create: Region in the Organizations and Roles functional area.	Enables you to create regions and region hierarchies.

Domains	Considerations
Manage: Grant Hierarchies - Create domain in the Grants Management functional area.	Enables you to create and edit grant hierarchies and assign related roles.
Manage: Location Hierarchy in the Organizations and Roles functional area.	Enables you to create location hierarchies and maintain location hierarchy organization assignments.
Set Up: Academic Unit Hierarchies domain in the Academic Faculty functional area.	Enables you to maintain academic unit hierarchies.
Set Up: Spend Categories domain in the Common Financial Management functional area.	Enables you to setup spend categories and view related reports.

Business Processes

No impact.

Reporting

Reports and Report Fields	Considerations
View in Tree Viewer report	Enables you to view organizations, organization details, and levels within a hierarchy in a single view.
Hierarchies with Duplicates Exception Audit report	Enables you to view organizations included multiple times within the same hierarchy.
Reports: • View Company • View Company as Of • View Cost Center • View Cost Center as Of • View Region • View Region as Of	Enable you to navigate organization hierarchies 1 level at a time, making it easier for you to find a specific organization.
Prompt - Cost Center Hierarchies and Subordinates report field	Enables you to select a cost center hierarchy in custom reports.
Prompt - Location Hierarchies and Subordinates report field	Enables you to select a location hierarchy in custom reports.

Integrations

No impact.

Connections and Touchpoints

Hierarchies interact with nearly every Workday feature. Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Concepts

Setup Considerations: Organizations on page 832

Tasks

Create Organization Hierarchies

Prerequisites

Security: At least 1 or more of these domains in the Organizations and Roles functional area:

- *Create: Company*
- *Create: Cost Center*
- *Create: Region*
- *Manage: Location Hierarchy*

Context

Hierarchies establish parent-child relationships or reporting relationships between organizations. They're part of the foundation that provides configurable and contextual security within Workday.

Each organization hierarchy has roles that represent the support groups assigned to it. Supporting roles have responsibilities within a functional area. Example: Compensation partner or HR partner. Each organization hierarchy has 1 Leadership role. The assignee of the Leadership role is the manager of the organization. Workday associates roles with role-based security groups when you configure the security group to inherit, which determines access to information about that organization hierarchy, business process routings, and notifications.

Steps

1. Access 1 of these tasks:
    - Create Company Hierarchy
    - Create Cost Center Hierarchy
    - Create Region Hierarchy
    - Create Location Hierarchy
2. As you complete the Assign Roles grid, consider:

Option	Description
Role	The prompt only displays roles that you're enabled to assign. Configure security groups that can assign the role on the Maintain Assignable Roles task.
Restricted to Single Assignment	Indicates that you can only assign the role to a single worker.
Assigned To	Select positions or position restrictions to assign to the role.

Next Steps

Create subordinate hierarchies by selecting Reorganization > Create Subordinate from the related actions menu of any level of the hierarchy.

Access the Organization Hierarchy report to view a hierarchy. To view and navigate a hierarchy, select Location Hierarchy > Navigate Storage Location Hierarchy from the related actions menu.

Related Information

Concepts

Concept: Reorganizations

Tasks

Change Organization Visibility on page 847

Create Location Hierarchies on page 927

Maintain Sort Order

Context

Workday enables you to assign a sort order to selected subordinates and included items in a hierarchy. You only need to assign a sort order to the subordinates or included organizations that you want to display first. Example: Your organization has 100 subordinates, and you want to display the 5 most important ones at the top. You specify sort orders for only those subordinates.

Note: This feature controls the order that items display in the organization chart and certain custom reports, but Workday doesn't use the sort order for any other purpose.

Workday sorts hierarchies and business processes similarly. You control the sort order by entering 1 or more alphanumeric characters, considering:

- Workday sorts numbers sequentially, not numerically. Example: 10 sorts before 2. We recommend you use letters to control the sort order, rather than numbers.
- Workday displays lowercase before uppercase letters but displays orderable items in no particular order regardless of case.
- When you use the same string for orderable items, you create a group of orderable items. Workday sorts items within the group in no particular order, but ensures that the group as a whole displays in its appropriate location in the resulting set of ordered items.
- You can skip letters. Example: a, c, d, f.
- Items with 2 letters display after the single-letter item. Example: Item ca displays after item c. Workday recommends using this method to insert a step without having to change the order designation of subsequent steps. Example: a, b, ba, bb, d.

Steps

1. Navigate to the organization that you want to assign a specific order for and select subordinates or included organizations.
2. From the related actions menu of the organization, select Sort Order > Maintain Sort Order.
3. As you complete the grid, consider:

Option	Description
Order	Enter the alphanumeric sorting character to define the order to display this hierarchy in relation to others in the grid.
Orderable Item	Select the item to sort. You can select past or future subordinates and included organizations.

Related Information

Tasks

Create Organization Hierarchies on page 937

Reference

Reference: Hierarchies on page 941

Add Organizations to Hierarchies

Context

You can add an organization to a hierarchy to create relationships for reporting purposes without assigning a superior or creating a subordinate organization.

Note: If an assignable role is defined for a specified hierarchy and organization and its security group is set to inherit, roles are inherited from the hierarchy to the organization.

Steps

1. From the related actions menu of the hierarchy, select:
    - Reorganization > Assign Included Organizations to add companies, cost centers, or region hierarchies.
    - Reorganization > Assign Locations to add locations to a location hierarchy.
2. Select the appropriate reorganization event from the prompt.
3. Select the:
    - Includes Organizations prompt to add companies, cost centers, or regions.
    - Locations prompt to add locations to a location hierarchy.

Result

Workday displays associated workers as members of the hierarchy or location hierarchy.

Related Information

Concepts

Concept: Reorganizations

Move Organizations in Hierarchies

Context

You can change the position of organizations in hierarchies to match changes to an organization's reporting structure.

Steps

1. From the related actions menu of an organization you want to move, select Reorganization > Assign Superior.
2. Select the Effective Date of the assignment.
3. Select the superior organization to assign to the selected organization from the Superior prompt.

Next Steps

Move the manager of the supervisory organization by selecting Reorganization > Move ~Workers~ (By Organization).

Correct Hierarchy Structure Exceptions

Prerequisites

Create a hierarchy structure on a top-level hierarchy.

Security: *Set Up: Organization* domain in the Organizations and Roles functional area.

Context

You can view and correct exceptions on a hierarchy structure. You can enforce a hierarchy structure if it has no exceptions.

Steps

1. Select Hierarchy Structure > View Exceptions from the related actions menu of the hierarchy structure.

   Workday displays hierarchy nodes that are invalid on or after the effective date according to the hierarchy structure.
2. Use 1 of these methods to correct exceptions on the hierarchy structure:

Objective	Navigation	Action
Change the hierarchy structure to match the existing hierarchy.	Select Hierarchy Structure > Edit from the related actions menu of the hierarchy structure.	Configure the Levels to match the organization subtype order within the hierarchy.
Change the organization subtypes within the hierarchy to match the hierarchy structure.	Select Organization > Edit Organization from the related actions menu of a hierarchy node in the Exceptions grid.	Change the Subtype to the appropriate level according to the hierarchy structure.
Remove invalid organizations from the hierarchy.	Select Reorganization > Assign Superior from the related actions menu of a hierarchy node in the Exceptions grid.	Clear the Superior field.

Next Steps

Enforce the hierarchy structure.

Concept: Hierarchy Structures

Workday enables you to define a hierarchy structure for certain types of hierarchies to ensure the hierarchy has logical levels. It enables you to control their order and is useful in roll-up reporting. You can only define a hierarchy structure on the top-level node and you can't inactivate or assign a superior to a top-level node with a hierarchy structure defined.

Hierarchies for organizations use organization subtypes as their level identifiers. Use the Maintain Organization Subtypes task to create available subtypes. Only valid subtypes or level identifiers for the hierarchy type of the top-level node are displayed in the prompt.

Workday enables you to specify whether a hierarchy structure is enforced. When you enforce a hierarchy structure, you require a level identifier to have the organization subtype immediately above in a hierarchy structure as its superior.

The hierarchy structure is enforced from the effective date onward to enable you to ignore past invalid data. You won't be able to enforce it if it's invalid on or after the effective date. Use the Hierarchy Structure Exceptions report or select Hierarchy Structure > View Exceptions as a related action from the hierarchy structure to identify invalid hierarchy structures.

You're creating a global location hierarchy. Your organization subtypes for location hierarchy include:

- Global World
- Continent
- Country
- State
- City

Global World is the top-level node of your location hierarchy and has no superior or organization subtypes. Configure the organization subtypes as levels in descending order. If you select the Enforce check box, Workday won't enable you to assign a location hierarchy with a subtype of City as the superior of a location hierarchy with a subtype of Continent.

If you select the Allow Skip Levels check box, a location hierarchy with an organization subtype of City can have a superior whose subtype is State, Country or, Continent. If you don't select the Allow Skip Levels check box, a location hierarchy with an organization subtype of City can only have a superior whose subtype is State.

Reference: Hierarchies

Hierarchies establish relationships between organizations in Workday. You can include organizations in any member of a hierarchy. Hierarchies don’t store definitions of individual objects but members of included organizations will roll up to the hierarchy. Example: Positions, workers, or financial accounts.

Roles can inherit from a hierarchy to a specified organization if a role is defined for both organization types and the security group inherits. When a role belongs to a security group with sufficient rights, you can assign the role at a higher level in a hierarchy. Subordinates can also inherit the role. You can make role assignments at any level. When a role-based security group has access rights to Applies to Current and All Subordinates, Workday treats the objects in the subordinate hierarchy as subordinates.

Some business object types support custom business processes. Example: Company is the primary business object for Financials. You can define business processes for a parent company and subordinate companies can use those business processes definitions. You can also define unique business processes for any subordinate company.

Note: Included organizations can also inherit business processes definitions. When you include an organization in multiple hierarchies that have business process definitions, Workday randomly selects 1. To avoid confusion, Workday recommends that you define business processes on only 1 hierarchy of a specific type.

Organization Hierarchies

You can configure these organization hierarchy types on the Maintain Organization Types report:

- Supervisory: You define the organization and place it in a hierarchy simultaneously. Each supervisory organization can:
    - Have only one superior organization.
    - Have many subordinate organizations.
    - Exist in a single hierarchy only.
- Custom: You can configure to include a hierarchy and optionally include nonhierarchical organizations.

You can use other hierarchy types to include nonhierarchical organizations, and a single organization can exist in multiple hierarchies. However, 1 organization can only be included in 1 hierarchy organization in 1 hierarchy structure. Example: A cost center can exist in multiple cost center hierarchies. When you include a cost center in multiple cost center hierarchies, it inherits the union of inherited role assignments from all hierarchies it exists in.

You can:

- Use these hierarchies for reporting to reflect different organizational structures.
- Change how you structure organization hierarchies at any time and can have multiple views of your data.

Viewing Hierarchies

To easily identify the hierarchy structure, you can navigate it without displaying organization membership by selecting Hierarchy > Navigate Hierarchy from the related actions menu of the organization.

Each node displayed in the hierarchy includes both subordinates and included organizations. The node displays the total count of these items. For supervisory organizations, the node displays the member count. In addition to the organization name, each card displays:

- Assignees in a Manager role or a role marked as 'Is Leader.'
- The organization type.
- The organization subtype.

The organization type and subtype only display for these hierarchy types:

- Cost Center Hierarchy
- Company Hierarchy
- Custom Organization Type Hierarchy
- Location Hierarchy
- Region Hierarchy
- Supervisory Organization

To display a hierarchy in tree form, access the View in Tree Viewer report and select Hierarchy > View as Tree from the related actions menu of these organization types:

- Cost Center
- Cost Center Hierarchy
- Company
- Company Hierarchy
- Custom Organization Type Hierarchy
- Location
- Location Hierarchy
- Supervisory
- Matrix

Use the View in Tree Viewer report to:

- Render all organization levels in a hierarchy, expanding 1 level at a time.
- Drill down on hierarchy details of an organization.
- View the number of organizations included in each level.
- Display details about each organization.

Related Information

Tasks

Create Academic Unit Hierarchies

Maintain Sort Order on page 938

Business Processes

Business Process Framework Concepts

Setup Considerations: Business Processes

You can use this topic to help make decisions when planning your configuration and use of business processes. It explains:

- Why to set them up.
- How they fit into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What They Are

As the cornerstone of many applications, Workday business processes route tasks to authorized users based on their membership in security groups and organization hierarchy. You can also configure conditional logic to scale business processes globally using localized content.

Business Benefits

Workday business processes:

- Make it easy to connect people, applications, and services by enabling you to set up configurable process flows.
- Enable administrators to configure all aspects of business processes without help from information technology staff or other consulting resources.
- Save time and speed adoption by enabling you to copy and modify over 550 preconfigured business processes.
- Ensure that each decision maker has access to the latest data by easily integrating with third-party applications as part of your workflow.
- Supply an audit trail after a business process completes.
- Speed up communications with business process participants by using business process notifications.
- Use business process security policies to determine who can participate and the actions they can perform.

Use Cases

Business processes can cover a wide range of scenarios to help you:

- Standardize and track any kind of request or approval.
- Create separate hire business processes for various positions within an organization.
- Track purchasing requests from planning to completion and provide a record of who completed each transaction in the process.
- Track changing issues and attitudes in your organization by distributing questionnaires and collecting the results.
- Automate any contract process by distributing documents for review and electronic signature.
- Automate assessments of student applications for admission.

Questions to Consider

Questions	Considerations
What kinds of procedures would you like to automate using a Workday business process?	You can create your own business process, or you can copy a Workday delivered default business process for a particular function and customize it. Example: The Hire, Change Legal Name, and Change Job default business process definitions.
What types of electronic signature would you like to use?	Workday offers its own electronic signature option as well as the Adobe Sign and DocuSign.
What type of requests, approvals, and request reporting would you find helpful?	You can consolidate the request processes (Example: purchasing, employee time off, building maintenance) across your organization, eliminating requests submitted over the phone, email, messaging, or word-of-mouth. Workday offers delivered reports and custom reporting when you use the *Request* business process.
What types of business process notifications would you find helpful?	You can create notifications triggered by the status of the business process as a whole (Example: completed, denied), or when the business process enters or exits a step. You can also delay when a custom notification is sent by configuring a notification delay on your business processes.
What kinds of reports do you wish you had?	You can report on completed business processes, provide an audit trail of changes, and report on business processes awaiting action.

Recommendations

Copy a default business process definition to any supervisory organization and tailor it as necessary. You can create different versions of the same business process for different organizations. Business process logic is inherited, so a subordinate organization uses the business process definition of the superior organization unless you specify a custom definition for the subordinate organization.

For optimal business process performance, Workday recommends that you limit the number of steps on a business process definition.

We support a maximum of 72 consecutive, non-manual steps on a business process. A non-manual step is a step that's automatically processed by the system without user interaction. Example: Not required steps, an *Integration* step, or a *Report* step. If you have business processes with 72 consecutive, non-manual steps, Workday recommends that you evaluate the business process definition to reduce the number of these consecutive steps or configure a rule-based business process definition with conditional steps.

You can use rule based business processes that select a routing structure based on the goal of the business process, the role of the initiator, or another condition.

Set up your organization structure to optimize business process routing, security, analysis, and reporting. Workday routes business process steps according to:

- Organizations: Groups of workers, cost centers, and other resources.
- Roles: Responsibilities assigned to a worker.
- Hierarchies: Structural attributes that establish parent-child relationships or reporting relationships between organizations.

- Locations: Geographic attributes.

Use the Tenant Analyzer report to verify your tenant configuration against Workday recommendations.

Use the Business Process Exception Audit report to find all business process definitions with critical errors.

Requirements

Configure and maintain the business process definition features you want to use:

- Approvals and actions.
- Related links.
- Rule-based business processes.
- Condition rules for step or validation requirements.
- To Do tasks and checklists.

Limitations

You can't associate all step types or actions with any business process. Access the Business Process Configuration Options report to determine which step types and actions you can associate with a business process.

Tenant Setup

Use the Edit Tenant Setup - Business Process task to manage settings for:

- Attachments
- Comments
- Delegation
- Electronic signatures
- End dates

Use the Edit Tenant Setup - Notifications task to manage settings for notifications.

Use the Edit Tenant Setup - System task to manage business process time zones.

Security

Workday doesn't secure business processes to domains, but each business process definition has its own business process security policy that determines who can:

- Start the business process.
- Perform action steps within the business process.
- Perform actions on the entire business process.
- Approve, correct, cancel, and rescind steps.
- Reassign tasks.

Each step within a business process definition is associated with a security group that defines who is responsible for that step.

To view the security policy for a business process, select: Business Process Policy > View from the related actions menu for a business process definition.

Business Processes

Workday delivers a wide range of preconfigured business processes. Access the Business Process Definitions report to view business processes in your tenant.

Reporting

Reports	Considerations
Business Process Configuration Options	Determine which steps and actions you can associate with a business process.
Find Events	Search and filter business process events by: • Business process type. • Initiating worker. • Organization. • Status.
Business Process Cycle Times	Monitor the average process time (days) for business process types and steps.
From the related actions menu for any business process event select: Business Process > > Full Process Record	Access business process details: • Process step history. • Associated events. • Notifications.

Business Process Transactions Awaiting Action	View all business processes for:
	• Awaiting Persons.
	• Days since initiation.
	• Days past due.
	• Ad hoc:
	  ◦ Approval Count.
	  ◦ Approval Requestors.
	  ◦ Approval Recipients.

Pending Business Process Notifications	View pending business process notifications. You can drill down into specific business processes for a functional area, including the recruiting functional area. If you currently use the report to identify pending recruiting notifications, you can select all recruiting business processes in the Recruiting prompt option.

Integrations

You can set up an *Integration* step on a business process that launches an *Integration Process* event. The event launches an integration system associated with one or more business processes. You can select from a list of integrations.

Workday Web Services (WWS) and REST APIs are available to help with integrations.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Concepts

Concept: Business Processes on page 954

Concept: Integration Business Processes

Create Integration (Step) on page 1018

Steps: Configure Business Process Definitions on page 996
Edit Business Process Security Policies
FAQ: Business Processes on page 1201
Workday Community: Business Process Administration
Workday Community: Workday Web Services (WWS)

Reference

Reference: Edit Tenant Setup - Business Processes on page 27
Reference: Edit Tenant Setup - Notifications on page 107
Reference: Edit Tenant Setup - System on page 164

Concept: Business Processes and Organizations

To define a custom business process, you must first associate it with a *business object* (typically an organization). The business process definition is then available within that organization and, if that organization has a hierarchy, all organizations beneath it. To determine which organization types you can associate with a business process, run the Business Process Configuration Options report.

If you're in a supervisory organization and its parent organization has a business process defined, you can use that business process. However, you can create your own version of that same business process in the child supervisory organization. When you do, the version associated with the parent organization is no longer available.

You can't have 2 versions of the same business process in the same organization. If you need a variation, either use conditions or create another organization for the second version of the business process.

The business process definition that Workday selects is based on the initiation date of the event, not the event effective date. Example: You update the *Change Job* business process definition for an organization, effective 2020-08-10. When you initiate a *Change Job* event before 2020-08-10, Workday uses the old version of the business process definition, regardless of the event effective date.

When you initiate a business process, Workday identifies which version of the business process to run by looking at the organizations associated with the object of the business process. Example: For business processes that act on employee job records, the target is a job or a position assigned to an organization.

An exception is a business process that handles a worker's person-related data, as this information isn't associated with a specific organization. In this case, Workday selects the business process definition for the organization related to the worker's primary job or international assignment, if they have one. This exception is important because workers with more than 1 job (a primary job and an additional job or jobs) might be assigned to more than 1 organization.

When you initiate a business process but you save it for later instead of submitting it, the business process definition that Workday uses is set at the time you click the Save for Later button. Also, Workday uses the information that's available upon saving the event. When there are fields tied to conditions that are on a rule-based business process definition and the fields don't contain data that satisfy any of the conditions when you save the event for later, Workday bypasses the rule-based business process definitions and uses the default business process definition.

Related Information

Concepts

Reference: Organization Types and Subtypes on page 853

Concept: Find Events

Use the Find Events report to search and filter business process events by various criteria, such as business process type, initiating worker, organization, and status.

You must select a Business Process Name.

When you select a value for any filter category, or facet, the Find Events report dynamically updates the resulting list of business process events and facet value counts. The facet value counts indicate the number of business process events that satisfy the current filter criteria and help you narrow your search criteria.

Facets and Facet Values

Workday displays the following search facets on the Find Events report:

- About Worker
- Business Process Type
- Initiating Worker
- Organization
- Status

Facets are non-tenanted and correspond to generic categories. Each facet contains one or more facet values; these are tenanted and correspond to specific values in your tenant. For example, the Initiating Worker facet displays values for workers in your organizations.

The number in parentheses indicates how many business process events have that facet value. For example, if a worker named John Smith initiated twenty business processes, the Initiating Worker facet would display a facet value of *John Smith (20)*.

By default, no facet values are selected. As you narrow your search, Workday dynamically updates the facet value count numbers for other facet values. When a facet value count is reduced to zero, Workday hides it. If all values for a facet are reduced to zero, Workday hides the entire facet.

For each facet, Workday displays the facet values with the most business process events. Click more... to display additional values. For facets with many possible values, a prompt enables you to select an additional facet value.

Search Results

Click Previous or Next to page back and forth. The Excel icon applies only to the search results currently displayed. Workday displays 50 events at a time in the search results.

Facet Search Index Updates

Workday displays 50 events at a time in the search results. Click Workday updates the search index when any business process event is initiated or changes status, ensuring that the facets reflect the most current information.

Search Security

The Find Events report is secured to the *Business Process Administration* and *Business Process Reporting* domains. Individual facets are secured by the domain of their underlying report fields. Without view access to a facet's domain, Workday doesn't display that facet on the Find Events report. Even if you have access, Workday only includes those employees whose data you have permission to see. For example, you have permission to see the About Workers facet, but only for certain employees. The facet value counts for the ratings will only include the appropriate employees.

To determine how a facet is secured in your tenant, search for the facet's associated report field and select Security > View Security as a related action. The View Report Field report also provides a brief description of the report field's (and facet's) purpose.

To identify the facet report fields, copy the Find Events report and view the Facet Options on the Advanced tab.

Workday does not support aggregation, intersection, and segment-based security groups for the Find Events report.

Saving Your Search

You can save Find Events searches to use at a later time. These are for your personal use and not available to others.

You can Clear All, Open, or Save a search. Clicking Open presents additional options that enable you to:

- Continue your last search, if there was a previous search during the same signin session.
- Select a search from a list of saved searches. The search options are displayed in alphabetical order.
- Manage saved searches. This option enables you rename or inactivate any saved searches. You cannot change the criteria of a saved search.

Custom Search Reports

You can create a custom version of the Find Events report using the Workday Report Writer. A custom search report enables you to control the available search facets, the order, and the fields that display in the search results.

To simplify your effort with a custom search report, select Standard Report > Copy as a related action on the delivered Find Events report, then modify the report to meet your needs. If you want the custom report to replace the standard version of Find Events, use the Hide Workday Delivered Report task to remove the standard report from menus and search results.

When you hide standard reports using the Hide Workday Delivered Report task, Workday doesn't display them in searches. If you can't find a specific report, access the Hide Workday Delivered Report task to determine if you hid it.

Note: When you copy the standard Find Events report to a custom report, the report definition of the custom report must contain a prompt to filter the results.

Concept: View Business Process Details

There are several ways to view the details of business process instances that are currently under way. Workday uses the terms business process instance and business process event interchangeably.

- View the Full Process Record for process details and information about the process-related instances.
- View the business process transactions awaiting action reports.

When you have modify permissions on the *Business Process Administration* domain, you can view all business process instances in Workday.

Full Process Record

The full business process record displays information about an instance of a business process. You can access it by selecting Business Process > Full Process Record from the related actions menu for any business process instance.

Workday displays different data according to the business process and the default definitions. Many of the data points provide related action menus that enable you to get more information or perform related actions.

Tab	Description
Details	Provides information about this instance of the business process and varies for every business process. Depending on the process, some information might not display until certain steps finish.

Tab	Description
Process	Lists each step in the process, when it's due, when it was completed, and by whom. You can click Remaining Process or select Business Process > View Remaining Process from the related actions menu of the business process event to view all remaining business process steps for that event. The Process tab displays a For column when a person takes action on a business process event that isn't assigned to them. Example: If a second recruiter moves a candidate forward to another recruiting stage on behalf of the original recruiter, Workday displays *Reassigned* in the Status column and the name of the original recruiter in the For column of the tab. Similarly, if an administrator reassigns a candidate from one recruiter to another, Workday displays *Reassigned* in the Status column and the name of the original recruiter in the For column of the tab. The Person (Up to 5) column displays up to 5 awaiting persons. Workday lists the names alphabetically along with their role. The All Persons column displays the total number of awaiting persons. You can click the number to view a list of all awaiting persons and their roles. When a step: • Completes, we display a 1 in the All Persons column. • Is unassigned, we display a zero in the All Persons column. Note: If a step in a business process is completed by a service center representative, the name of the service center is displayed in the Person (Up to 5) column. If you're secured to the *Manage: Service Center* domain (Example: If you're a security administrator or a service center administrator), the name of the service center representative is displayed in the Service Center Representative column. The Process tab displays all comments, if any. Workday hides comments and details from only the person an event is for when you select these check boxes on the business process security policy: • Hide Comments from Person • Hide Details from Person • Hide Process History from Person

Tab	Description
	This occurs when the person is a worker or a non-worker (such as an integration user or implementer). When there's no worker associated with the event target and you select the check boxes, Workday won't hide comments and business process details from non-workers who have access to the event. When a worker initiates an event and a step is sent back to the worker, the worker can view the send back comment. The worker won't see comments on approvals or denials. The Hide Details from Person check box overrides the Hide Comments from Person check box. Meaning, if you only select the Hide Details from Person check box, Workday hides both comments and details of the event.
Comments	Displays any comments added to the process, who added them, and when.
All Events	Displays all the events that occurred in connection with this instance of this business process. An event is anything that happens within your company that Workday manages or records. Example: You hire someone, create an account, or change payroll data. When you enable notifications for a business process, Workday displays all notifications that Workday sent for this business process instance in the All Notifications grid. When you configure a custom notification with a notification delay, we display all pending notifications in a Pending Notifications grid. In the grid, we display information such as: • Delayed Until. When the notification is scheduled to be sent. • The Recipient. • Trigger on Workflow Step. We display the delayed business process step in the Trigger on Workflow Step column when you select these notification triggers: On Entry, On Exit, On Ad Hoc Approve, and On Shared Participation Step. • Trigger on Status. In the All Notifications grid, the: • SMS Message column enables you to view details of custom business process notifications sent through the SMS messaging channel. Workday doesn't create a notification event if the recipient

Tab	Description
	didn't opt in to SMS with their mobile phone number. When there's an email and SMS message on the same notification, Workday creates the notification event with the Email Body column populated but the SMS Message column is empty. • Channel Sent On column enables you to audit all of the notification delivery channels that sent out custom and system business process notifications that are triggered by the business process. We don't display My Tasks as a notification delivery channel in the column. Example: We don't enable you to view non-informational notifications that display under the My Tasks icon. • Workflow Notification Disposition Reason column enables you to view the disposition reason configured on the recruiting business process. You can only configure a custom notification to trigger on a disposition reason for recruiting business processes.
All Actions	Displays the actions that ran as part of this business process. If any of these actions triggered another business process, Workday displays any actions that ran as part of those business processes. The tab includes the results, dates, and related information. The By column displays either: • Who completed the step. Example: A *To Do* step was completed by a manager. • Who is supposed to act on the step. Example: An *Approval* step is awaiting action from/by HR Partner. When you reassign a step, we display the latest date and time when the reassignment successfully completes in the Event Record Moment column. When you reassign an unassigned task and the business process administrator approves the reassignment, we update the Event Record Moment to reflect when the awaiting person is assigned to take action on the task. Workday doesn't update the Event Record Moment if the reassignment is: • *Canceled*. • *Denied*. • *Pending*. Example: Your company uses a third-party system to track when a business process task is reassigned in Workday. You want to know:

Tab	Description
	• When the reassignment occurred with the latest timestamp (date and time). • Who is now assigned to the task to take action. In order for your third-party system to capture real-time reassignment changes that occurred in Workday, the third-party system pulls the latest timestamp of the reassignment change from the Event Record Moment on the Full Process Record in Workday. For audit reporting, you can tag instances of business processes. When a business process definition goes in error status, an audit trail entry isn't created. However, if the business process definition is in error and an event is created, Workday creates an audit trail entry.
Documents	Displays all uploaded documents, whether or not the documents have been signed, and if the document was redirected. If a document is redirected, Workday displays this information in the Reviewed Documents grid: • Declined • Date Declined • Declined by Workday displays the Documents tab when: • The business process definition contains a *Review Documents* step. • There's a distribution event.

Delegation and Exclude Business Process Steps

You can view the Full Process Record for process details and information about the process-related instances when you delegate a task that's configured to exclude business process steps.

When you delegate a task from the related action:

- The Process tab displays the delegate in the Person column.
- The All Actions tab displays the delegate in the Awaiting and Event columns.
- The All Actions tab doesn't display the Excluded from My Tasks column.

When you delegate a task using the Manage Delegation Settings task, and the Retain Access to Delegated Tasks within My Tasks check box is selected:

- The Process tab doesn't display the delegator in the Person column.
- The All Actions tab displays the delegate in the Awaiting column.
- The All Actions tab displays both the delegate and delegator in the Event column.
- The All Actions tab doesn't display the delegator in the Excluded from My Tasks column.

When you delegate a task using the Manage Delegation Settings task, and the Retain Access to Delegated Tasks within My Tasks check box isn't selected:

- The Process tab displays the delegate in the Person column.
- The All Actions tab displays the delegate in the Awaiting and Event columns.

- The All Actions tab doesn't display the Excluded from My Tasks column.

Business Processes Awaiting Action

These reports display business process instances that are awaiting action:

- Business Process Transactions Awaiting Action - Displays all instances that are awaiting action.
- Business Process Transactions Awaiting Action for X Days - You can specify how long they have been waiting.
- Business Process Transactions of Type Awaiting Action - You can specify which business processes to display.

Related Information
Concepts

Concept: Exclude Business Process Steps from the My Tasks on page 1065

Concept: My Tasks on page 1209

Edit Business Process Security Policies

Steps: Set Up Auditing on page 696

Concept: Business Processes

A business process in Workday is a set of tasks that people initiate, act upon, and complete in order to accomplish a desired business objective. When you initiate a business process, Workday routes the tasks to the responsible roles (users who are capable of completing the tasks based on their membership in security groups) and enforces security and business rules throughout the business process.

Any user with the appropriate role can initiate a business process. Once initiated, the business process notifies users in the responsible roles as it processes each step and receives feedback when each step is complete, so it can move on to the next step. Note that steps in a business process can be conditional.

All business processes are based on a business process definition; you can't create a business process in Workday without first defining it. Workday's default business processes are delivered definitions and can be customized to meet your needs. You can copy the business process to any supervisory organization and tailor it as necessary, creating different versions of the same business process for different organizations. The business process logic is inherited, so a subordinate organization uses the business process definition of the superior organization unless you specify a custom definition for the subordinate organization.

If a business process doesn't have a default definition, you can use the Create Business Process Definition (Default Definition) task to create and configure the default definition.

The Business Process Types with Default Definitions in Use report displays default business processes that are in use.

The Business Process Configuration Options report displays which organization types you can associate with a business process.

Example

Hire is a simple 2-step business process:

1. A person with the appropriate role (such as a manager or HR Partner) initiates the business process by completing the Hire Employee task in Workday.
2. Workday routes the *Propose Compensation* step to the person with the appropriate role (such as a manager or HR Partner) to propose compensation for the candidate.

The business process is *complete* when either the final step (*Propose Compensation*, in this case) or the designated completion step is carried out.

Business Process Definitions

The business process definition is the list of steps (tasks) that comprise the business process and the roles responsible for completing them.

For optimal business process performance, Workday recommends that you limit the number of steps on a business process definition.

We support a maximum of 72 consecutive, non-manual steps on a business process. A non-manual step is a step that's automatically processed by the system without user interaction. Example: Not required steps, an *Integration* step, or a *Report* step. If you have business processes with 72 consecutive, non-manual steps, Workday recommends that you evaluate the business process definition to reduce the number of these consecutive steps or configure a rule-based business process definition with conditional steps.

Workday provides a read-only graphical view of business processes. You can use this graphical view to communicate designs, confirm designs, and confirm workflow changes. To view the diagram of a business process, either click View Diagram on the View Business Process Definition page, or from the related actions menu of the business process, select Business Process > View Diagram.

You can't change the step type of existing steps when you edit a business process definition. If you want to change the step type, you can remove the step and add a new step with a new step type on the business process definition.

When you copy or link to a business process definition, you can't set an effective date that's before the original business process creation date.

To view a list of business processes in Workday, you can:

- Run the Business Process Definitions report.
- Select Business Process > Business Process Definitions for Business Object as a related action on a supervisory organization. Workday displays business processes associated with the selected organization.

For audit reporting, you can tag instances of business processes. This enables you to track and report on business process configuration changes in your tenant such as changes made to a business process definition. Note that you can't apply an audit tag to dynamic business processes. As a result, audit trail entries won't be created in the Audit Trail Report for dynamic business processes.

The Inactivate Orphaned Business Process Definitions task enables you to filter and inactivate business process definitions that are active but orphaned. Meaning, the business process definition:

- Isn't set as a default definition.
- Doesn't have organizations associated with them.
- Isn't part of a rule-based business process definition.

On the Inactivate Orphaned Business Process Definitions task, the Business Process Definitions to Inactivate field displays orphaned business process definitions that you can inactivate. When you select the Confirm check box and then OK, Workday inactivates the listed business process definitions. If you don't see business process definitions listed in this field and you select the Confirm check box, no changes are made to the tenant because there are no active but orphaned definitions to inactivate.

For certain steps of manually advanceable business process types, you can mark them as Do Not Advance. You can use this feature to eliminate the risk of fraud in cases where a user may advance an event to completion without approval. By marking critical steps in a business process definition as Do Not Advance, you also reduce the risk of accidental manual advancement of an event. An event cannot be advanced from or through a step that is marked as Do Not Advance including methods such as the Advance Manually related action on a business process event, or through the Advance Business Process Mass Operation Management type. This functionality is only available for steps that you can assign to a security group. Steps that you can't assign to a security group, with the exception of a *Report* step, can't be marked as Do Not Advance.

Business Processes and Security

Each step within a business process definition is associated with a security group that defines who is responsible for that step. In addition, the business process definition is governed by a business process security policy that determines who can:

- Start the business process.
- Perform action steps within the business process.
- Perform actions on the entire business process.
- Approve, correct, cancel, and rescind steps.
- Reassign tasks.

When you access and view a business process security policy and there are unexpected security groups in any of these business process actions, we display a warning message that identifies the security groups and the business process action they are configured on:

- Ad Hoc Approve
- Deny
- Deny (Web Service)
- Manual Send Back
- Request Reassignment

This enables you to identify the invalid security groups and remove them from the security policy and ensure the right person has access to business process allowed actions.

If a business process security policy has existing unexpected security groups configured for any of the 5 business process actions and you make any changes to the security policy, you can still save your changes. Workday displays the warning message about the unexpected security groups. If you see the warning message, Workday recommends that you thoroughly test your configuration to ensure that it doesn't cause any unintended access to data and the routing rules behave as expected.

If you see unintended data access in your tenant, we recommend that you remove the security group from the business process security policy. When you remove unexpected security groups from any of the above business process actions and save your changes, you won't be able to add the security groups back to those business process actions. You also won’t be able to search for the security group in any of those 5 business process action prompts.

To identify unexpected security groups on business process security policies, you can access the Security Exception Audit report to view audit entries on these tabs:

- Business Process Security Policy Exceptions
- Security Group Exceptions

When you tag a business process and make changes to a business process security policy, audit trail entries are created. In the Audit Trail Report:

- When you edit a business process security policy for the first time and save it without making any changes, Workday adds multiple entries to the report.
- An audit trail entry is created in the report when a security change is made to business process security policy even before you activate the change.
- When you update security policy permission prompts, the Lineage column of the report displays the path to the section on the business process security policy, but doesn't specify the actual prompt that was changed.

When you have inactive security groups in your tenant and the security groups are associated with allowed actions that are no longer available on the business process security policy, you can remove the inactive security groups. Any user with permission on these domains can remove the inactive security groups by accessing the Remove Inactive Security Groups from Unavailable Actions task:

- *Business Process Administration*
- *Security Activation*

- *Security Configuration*

The Remove Inactive Security Groups from Unavailable Actions task helps you identify and remove inactive security groups.

Note: Before you run the Remove Inactive Security Groups from Unavailable Actions task, Workday highly recommends that you access the Activate Pending Security Policy Changes task to confirm and activate existing security changes. After you run the Remove Inactive Security Groups from Unavailable Actions task, you must access the Activate Pending Security Policy Changes task again to complete the process. If you don't see the business process type on the Activate Pending Security Policy Changes task, continue to confirm the pending security policy changes. Determine if you need to remove inactive security groups in your tenant before you proceed.

Once you remove the security group and access the Security Exception Audit report, Workday won't display the security group on the Business Process Security Policy Exceptions tab. The Remove Inactive Security Groups from Unavailable Actions task doesn't address audit items that might display on these Security Exception Audit report tabs:

- Domain Security Policy Exceptions
- Security Group Exceptions

Share Your Business Process Definitions

You can use the Business Process Definition data source to share information about your business process definitions with key stakeholders. Example: You can create a custom report that displays a selected set of business process definitions, along with the initiating security groups, the individual workflow steps, and the custom notifications that comprise each definition. This report can be shared or exported for use by upper management, project managers, or customer managers.

The Business Process Definition data source is secured by the *Manage: Business Process Definitions* security domain.

Related Information
Concepts

Concept: Business Processes and Organizations on page 947

Concept: Custom Reports

Steps: Configure Business Process Definitions on page 996

Edit Business Process Security Policies

Steps: Set Up Auditing on page 696

Concept: Effective Dates

The effective date for a *business process definition* is the date a proposed change in the business process becomes available. If you set an effective date in the future, the change doesn't take effect until that date. Effective dates apply to items such as business processes, consolidated approvals, step conditions, and so on. You can use an item after its effective date until it's superseded by a version with a new effective date.

Workday asks you to specify an effective date and, optionally, a time zone, whenever you create or edit one of these elements. When you open an item, use the present date to see the current version and a future date if you know that there’s a version not yet in effect.

Workday evaluates user permission when taking action on a business process event as of the current date in order to process the event. This action doesn't affect the effective date of the business process definition or its related elements.

When actually running a business process, the effective date is the date when the event will take effect. Example: For a business process that gives a pay raise, the effective date is when the raise begins. For hiring a new employee, the effective date is the first work day.

You can also select a time zone for the effective date. Select the *Business Process Configuration Time Zone* option on the Edit Tenant Setup - System task. The default time zone is the current time zone.

- If you enter the current date in the specified time zone, the changes take effect immediately. Users in other time zones see the changes immediately.
- If you enter a future date in the specified time zone, the changes take effect at midnight on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.
- If you enter a past date in the specified time zone, the changes take effect at 23:59:59 on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.

The Due Date Is Based on Effective Date column for a business process step doesn't refer to the effective date for the business process definition. It refers to the date that the process initiator specified when starting the business process.

Subprocesses of a business process use the effective date of the parent business process by default. You can use the Maintain Business Process Definition Selection report to change the effective date of a subprocess to the date the parent business process initiates it. This report enables you to fix errors in subprocesses after you initiate a business process without stopping and restarting the business process.

Concept: Time Zone and Due Date

You can set a due date for the business process as a whole, or on each business process step. The due date is the elapsed time from when the step starts until the step is complete. When you view the business process history, you can determine if appropriate action was taken on a step and if the step completed on time.

When you configure a due date on a business process step, Workday displays the due date of the step in the user's local time zone if the user is located in UTC-1 or greater. Example: Ireland and Australia. This doesn't apply to users located in time zones of UTC-2 or less. Example: Canada and New York

To determine a step's due date, Workday uses the end of day (23:59:59) in the Pacific Time Zone (UTC-8) of the system and converts the due date to the user's local time zone.

We display the user's local time zone for the due date in the:

- Awaiting Your Action section on the Workday Home page.
- My Tasks item.
- My Tasks item's Process History.
- Up Next message.
- You have submitted dialog box.
- Due Date column on the View Event page.

The functionality only applies to how we display the due date and not how the system calculates the due date.

If you set a due date on a business process step and you select the Due Date Is Based On Effective Date check box on the step or the business process definition as a whole, Workday might add 1 additional day to the due date based on how the system persists the effective date of the business process.

Example 1:

Betty is based in San Francisco, California and she initiates a business process on 07/14/2024. On the business process definition, a *To Do* step has a due date of 1 Day which means the due date is 07/15/2024. The *To Do* step is assigned to Yumiko. She is located in Tokyo, Japan. Based on the UTC offset, Japan is in UTC+9. On the View Event page, we display the Due Date as 07/16/2024 to Yumiko. If Betty views the event, Workday displays 07/15/2024 as the due date for the *To Do* step.

Example 2:

The *Title Change (Default Definition)* business process definition has an Effective Date of 06/13/2024. On the *Approval* step, the:

- Due Date field is 1 Day.

- Due Date Is Based On Effective Date check box is checked.
- Step is assigned to the HR Partner security group. James is an HR Partner based in Singapore. Singapore is in UTC+8.

Mike is located in Pleasanton, CA. On 06/13/2024, he initiates the *Title Change* business process. Workday sets the persisted effective date of the business process as 06/13/2024. The *Approval* step's due date is calculated as end of day on 06/14/2024 in Pacific Time Zone. When we reach the *Approval* step, Workday converts the due date to the local time zone for James in Singapore.

In Workday, we display the *Approval* step due date as:

- 06/15/2024 for James in his local time zone, Singapore.
- 06/14/2024 for the business process administrator in Pacific Time Zone.

In some cases we might add 1 extra day to the due date if the business process is initiated in a non Pacific Time Zone and the initiator selects a business process effective date. In the above example, a worker in Singapore initiates the *Title Change* business process and selects an effective date of 06/14/2024. Workday persists 06/14/2024 as the business process effective date. When viewing the event in Workday, we display the *Approval* step's due date as:

- 06/15/2024 to a user in Pacific Time Zone. (06/14/2024 plus 1 day.)
- 06/16/2024 to a user in Singapore. (06/15/2024 plus 1 day.)

Related Information
Tasks
Edit Business Processes on page 1005

Concept: Order of Execution

You can specify the order in which certain items occur within a business process, including:

- The order of business process steps.
- The order of rules in a condition.
- The order of To Dos in a checklist.
- The order Workday processes step help.

Order is set by entering one or more alphanumeric characters in the order column. We recommend using letters, because Workday sorts numbers sequentially, not numerically; 10 sorts before 2.

Workday enforces the English language for workflow step display and processing.

Lower-case letters display below their upper-case versions, but Workday processes business process steps with the same letters in parallel, in any order, regardless of letter case. Workday completes all parallel steps before starting the next step.

In business processes, the *Initiation* step is always a lower-case a. Edit the Order fields to use only character strings starting with b through z (upper- or lower-case). Using an upper-case A (or any numbers or special characters) generates a warning that the *Initiation* step must be the only first step.

Use the same string for business process steps that can be completed in parallel. Order of completion for business process steps with the same string doesn't matter, except that they must all be complete before the next step can start. For condition rules, don't specify steps with the same character strings in the Order column.

You can skip letters. Example: Order designation of a, b, c, d, f is fine.

If you add an item with 2 letters, such as ca, it runs after step c. You can use as many letters as you want to insert separate steps. Use this method to insert a step without having to change the order designation of subsequent steps. Example: a, b, c, ca, cb, cc, d....

Related Information
Concepts
Define Order of Parallel Steps in My Tasks on page 1048

Concept: Step Conditions

A condition is part of a business process step and consists of 1 or more rules. When the condition consists of more than 1 rule and any of them is false, the entire condition is false.

Note: Conditions aren't evaluated when a business process runs from a web service or EIB and is set to automatically complete.

You can optionally define entry conditions for any steps, except *Initiation* steps. For *Approval Chain* and *Consolidated Approval Chain* steps, you can also define while-running conditions and exit conditions. In addition, *Initiation* steps and *Action* steps can also include validation conditions where you set the severity of the validation to either block a step from exiting or allow a step to continue.

To add or change the condition associated with a business process step, select Business Process > View Definition as a related action on the business process, and then select Business Process > Maintain Step Conditions as a related action on the desired business process step.

You can't take this action from the Edit Business Process Definition page of a business process.

For audit reporting, you can tag instances of business processes. This enables you to track and report on business process configuration changes in your tenant such as adding step conditions to a business process step. When you add a step condition to a step, an audit trail entry is created in the Audit Trail Report. You might see additional entries in the report for each step that you add a step condition to.

Workday prompts you to select an effective date for the step condition. The default effective date is the current date.

If you remove condition rules when there are existing initiated events, the condition rules still trigger. However, condition rules won't trigger on new events. The effective date you specify on the Maintain Step Conditions task is respected. Example: You remove a condition rule on an *Action* step with an effective date of 2024-01-19. Workday won't trigger the condition rule on events initiated on or after 2024-01-19 in the tenant's time zone.

You can also select a Time Zone for the step condition only if you enable the Business Process Configuration Time Zone check box on the Edit Tenant Setup - System task. The default time zone is the user's current time zone.

Select the Business Process Configuration Time Zone option on the Edit Tenant Setup - System task to override the default time zone on a step condition. When you enter:

- The current date in the specified time zone, the changes take effect immediately. Users in other time zones see the changes immediately.
- A future date in the specified time zone, the changes take effect at midnight on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.

  Example: It's 9:00 AM PST on 2024-01-22. On a business process definition, a business process administrator accesses the Maintain Step Conditions task to remove an entry condition on an *Approval* step. The business process administrator selects:

  - 2024-01-24 in the Effective Date field.
  - Singapore Standard Time (SST) in the Time Zone field.

  The condition rule on the *Approval* step won't trigger for new events starting at midnight SST on 2024-01-24.
- A past date in the specified time zone, the changes take effect at 11:59:59 PM on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.

Validation Conditions

Initiation steps and *Action* steps can have a validation condition. The Maintain Step Conditions related action allows you to set 1 of these severities on a validation condition:

- Warning: When any condition rule is true, Workday displays the error and you can still continue to move to the next business process step even if there are errors in the step.
- Critical: When any condition rule is true, the step is blocked from exiting. You won't be able to continue to the next business process step until validation errors are fixed. Workday sets the validation condition to Critical by default.

When you configure a validation condition, the Validation column in the business process definition displays the name of the condition rule and whether it's Critical or a Warning.

When all conditions are false, the step will exit and the process will continue.

Validation conditions are only available on *Initiation* steps when the ability to revise the associated business process is built into the Workday-delivered business process or step. This ability is required to send the step back to the user's My Tasks when a validation condition is encountered.

To add a validation condition to an *Action* step, you must add the validation condition directly to the *Initiation* step of the business process definition associated with that *Action* step.

On an *Action* step, you can enable the Enable Validation Conditions for Add Approvers check box on the Maintain Step Conditions task. When you select the Enable Validation Conditions for Add Approvers check box on the *Action* step, and if any of the validation conditions are true, Workday triggers validation messages when a reviewer adds approvers and clicks Approve and Send to Approvers on the My Tasks item. When the validation condition is a:

- Critical severity, Workday won't add additional approvers and the event has a status of Saved for Later. The reviewer won't be able to add approvers to the *Action* step until the reviewer fixes the validation errors. Once the reviewer corrects the data and clicks Approve and Send to Approvers, Workday re-evaluates the validation condition. If the validation condition is false, Workday continues to add additional approvers to the step.
- Warning severity, Workday displays the warning message and the reviewer can still proceed to add approvers to the *Action* step. When the warning message triggers, the reviewer would need to add the approver again and click Approve and Send to Approvers. Workday then adds the additional approver to the step and the workflow continues.

When you select the Enable Validation Conditions for Additional Approvers check box on an *Action* step that's already in-progress, Workday won't trigger validation conditions on the step when a reviewer adds additional approvers on the step.

To determine if a business process or step can be revised, run the Business Process Configuration Options report:

- If the Approval Options column includes Send Back, the business process can be revised, and you can configure a validation condition on the *Initiation* step.
- If the Options on Save column in the Allowed Actions section includes Send Back, the step can be revised, and you can configure a validation condition on that step.

Roles with permission to initiate a business process that uses a defined template (such as *Change Job*) must also have View All permission on the business process security policy to ensure that Workday evaluates validation conditions.

Entry Conditions

All types of steps can have an entry condition, except *Initiation* steps. If the condition is true, the step runs. If the condition is false, the step is skipped.

Some *business process definition* steps have Workday-supplied entry conditions for *Action* steps, which you can’t edit. However, you can specify additional entry conditions for these steps. Both the Workday conditions and your conditions are evaluated when the business process runs. Workday skips any step that doesn’t satisfy all the entry conditions.

When a web service automates a business process, such as in an EIB spreadsheet upload, Workday automatically skips *Approval* steps, but continues to evaluate entry condition rules for *Integration* steps, *Service* steps, and *Action* steps that initiate sub-events.

While-Running Conditions

Only *Approval Chain* and *Consolidated Approval Chain* steps can have a while-running condition.

This condition works like an entry condition for each approval level in the chain. It compares the next approver to a value and if the condition is true, the step routes to that approval level. If the condition is false, it skips the current approval level and moves on to evaluate the next approval level in the chain.

When you use an *Approval Chain* or *Consolidated Approval Chain* step type for a worker with multiple managers for a single position, Workday randomly selects a person in a level and checks the while-running condition to see if that person meets the condition. If the person in the level meets the condition, the step routes to them. However, if the randomly selected person doesn't meet the condition, Workday marks everyone in that level as not required and proceeds to the next level. Before moving to the next level, Workday checks the exit condition. In scenarios where the exit condition isn't met yet, Workday continues to move up the chain. If 1 person in the previous step meets the exit condition, the approval chain exits.

Workday recommends that you don't configure a while-running condition when there are multiple managers in an approval chain.

You can use calculated fields in a while-running condition rule to determine the next approver in the approval chain when in a current step.

When you also have routing restrictions on a step, this can reduce the number of possible approvers that the while-running condition evaluates. Workday evaluates the while-running condition in each approval level first. If the while-running condition is met, we proceed to evaluate the routing restriction.

The while-running condition checks an approval level even though you might have set a routing restriction to exclude prior approvers.

Example: An *Approval Chain* step has a while-running condition to check for a manager and a routing restriction to exclude prior approvers. A manager, Betty, approves the step in a previous approval level. In a subsequent level, Betty is also an approver. The while-running condition still evaluates this approval level even though the routing restriction is to exclude prior approvers. The step goes unassigned if there isn't anyone else in the approval level to approve besides Betty.

Exit Conditions

Only *Approval Chain* and *Consolidated Approval Chain* steps can have an exit condition.

For these steps, this condition evaluates the approver who just completed this level of the chain and if the condition is true, the step exits. Like the while-running condition, an exit condition is also working while the *Approval Chain* or *Consolidated Approval Chain* is running. The difference is that when the condition is met, the exit condition exits the step; when the while-running condition isn’t met, it skips to the next level in the chain.

Starting at the second approval level, Workday evaluates the exit condition at each level including approval levels that are skipped as a result of routing restrictions and while-running conditions that might be configured on the step.

When the exit condition is never met, the *Approval Chain* or *Consolidated Approval Chain* step exits after reaching the highest approver in the management hierarchy.

Related Information
Concepts

Create Business Process Condition Rules on page 1011

Steps: Set Up Auditing on page 696

Concept: Completion Steps

When the *Completion* step or steps finish, the business process is listed as *complete*, even when there are more steps to do. Example: A person can be listed as *hired* even if the steps for having the new employee enter personal information and the W-4 form aren't yet done.

Completion makes the data for this business process available to other Workday products, like Payroll or Financial Accounting.

On the View Business Process Definition page, you can set a step as a *Completion* step by selecting Business Process > Set as Completion from the related actions menu of the business process step. To remove the completion step setting, you can select Business Process > Remove as Completion from the related actions menu.

If you want to set a new step as a *Completion* step, you can edit the business process definition to add the new step. Then on the View Business Process Definition page, set the step as a *Completion* step.

For the step that's set as the *Completion* step, we display Yes in the Complete column on the business process definition. This helps you easily identify when a step is a *Completion* step.

When there aren't any *Completion* steps, the business process is considered complete when the last step finishes. You can set an *Approval* step as a *Completion* step on the business process. When you don't set an *Approval* step as a *Completion* step, then the *Approval* step must come before *Completion* steps on the business process.

You can make *Completion* steps parallel by assigning the same Order to multiple steps, which enables Workday to trigger them at the same time. When a business process progresses past its *Completion* steps, the business process completes, even when some *Completion* steps aren't triggered by entry conditions.

When a business process runs as a subprocess of another business process, the parent business process can continue after the subprocess finishes its *Completion* steps.

Related Information

Concepts

Concept: Effective Dates on page 957

Concept: Approval Chain Routing

You can add these steps to a business process definition:

- *Approval Chain*
- *Consolidated Approval Chain*

When your tenant includes complex supervisory organization structures, make sure approval chain steps route to the appropriate people to take action. You might want to route approval chain steps up a supervisory organization structure instead of a management chain.

You can configure *Approval Chain* and *Consolidated Approval Chain* steps to route based on:

- Management hierarchy. Workday routes approvals using position-based routing.
- Organization hierarchy. Workday routes approvals using organization-based routing.

By default, Workday uses position-based routing to route approval chain steps if you don't enable organization-based routing.

If you want to route approval chain steps using the enhanced position-based routing functionality, you can enable the Enable Enhanced Position-Based Approval Chain Routing check box on the Edit Tenant Setup - Business Processes task. When you select the check box, Workday consistently evaluates all approvers in each level of an *Approval Chain* or *Consolidated Approval Chain* business process step when a person reports to 1 or more managers in their position. Workday recommends that you consider enabling this enhanced position-based approval chain routing functionality even if people in your organization might not have multiple managers.

Based on the configuration you set, Workday determines the next-level approver of the step and assigns the approvals.

For *Approval Chain* and *Consolidated Approval Chain* steps, you can define while-running conditions and exit conditions. On a business process definition, you can add or change the condition associated with *Approval Chain* or *Consolidated Approval Chain* steps. From the related actions menu of the step, select Business Process > Maintain Step Conditions.

Route by Organization Hierarchy

You can use organization-based routing to route approvals to leaders who might manage multiple areas beyond their direct reporting structure. Example: You use organization-based routing for these processes:

- Hire request.
- Merit increase.
- Supplier invoice.

Workday routes the step to the manager of the person's organization, and then to the manager of the second-level organization. If necessary, Workday next routes the step to the manager of the third-level organization, and so on, up the organization hierarchy.

To use an organization-based hierarchy, access the Maintain Advanced Routing task from the related actions menus of the business process step. When you select the Organization-Based Routing check box, you:

- Can only select constrained role-based security groups for the *Approval Chain* and *Consolidated Approval Chain* steps. Workday recommends that you select a security group that has access rights configured for the current organization and unassigned subordinates. Otherwise, the approval chain step might go unassigned or route to all assignees at a higher level in the organization structure.
- Can't later change the step to another step type on the business process definition.

When you don't enable organization-based routing, Workday uses position-based routing for approval chain steps.

Use Case	Details
When a person and their manager have 1 position, and their positions are in different organization hierarchies, we route the approval chain step to the top of the person's organization hierarchy chain.	You configure a business process definition with an *Approval Chain* step that uses organization-based routing. Your company uses this hierarchy: • Organization AAA is the superior organization of Organization AA. Organization AA is the superior organization of Organization A. • Organization BBB is the superior organization of Organization BB. Organization BB is the superior organization of Organization B. • James is a worker in Organization A and reports to Betty. Their positions are in different organization hierarchies. • Betty is a manager in Organization A, and the position reports to Logan in Organization BB. • Logan is a manager in Organization BB, and the position reports to Steven in Organization BBB.

Use Case	Details
	• Tony is a manager in Organization AA, and the position reports to Chris in Organization AAA. For business processes related to James that use organization-based routing, Workday routes the *Approval Chain* step to Betty, Tony, and Chris.
When an approver is in multiple organization levels and someone else approves the step, the approver still receives the approval step in a subsequent level.	On a business process definition, step *c* is an *Approval Chain* step with organization-based routing. An approver is in organization levels 1 and 3. Workday routes the step to: • Betty and Max in the first level. Max approves the step. • Logan in the second level. Logan approves the step. • Betty and Steve in the third level. Betty and Steve receive the task in My Tasks.
When an approval chain step is in progress and the organization reduces the number of levels in the hierarchy, Workday skips a level of approvers.	An organization hierarchy has this structure of approvers: • Level 1: James • Level 2: Betty • Level 3: Logan • Level 4: Steve James approves an *Approval Chain* step and it's awaiting action from Betty in level 2. Betty approves the step. Halfway through the approval chain process, the organization hierarchy changes to a new structure: • Level 1: James • Level 2: Logan • Level 3: Steve Since James and Betty initially approved the step, Workday routes the step to Steve. Logan doesn't receive the step.
When the number of approvals increase in an organization hierarchy, an approver might receive the approval step again. But the step won't be required.	An organization hierarchy has this structure of approvers: • Level 1: James • Level 2: Logan • Level 3: Steve James approves an *Approval Chain* step and it's awaiting action from level 2, Logan. Logan approves the step. Halfway through the approval chain process, the organization hierarchy changes to a new structure that includes a new organization level: • Level 1: James • Level 2: Betty • Level 3: Logan

Use Case	Details
	• Level 4: Steve Since James and Logan initially approved the step, Workday routes the step to Logan in level 3 and marks the step as *Not Required*. Betty doesn't receive the step. Workday recommends that you not change the organization hierarchy when an approval chain event is in progress.

Route by Management Hierarchy

Position-based routing enables you to route *Approval Chain* and *Consolidated Approval Chain* steps by the management hierarchy of a supervisory organization.

Workday routes all events based on the person's position.

Use Case	Details
Workday routes the step to the manager of the person's position, then to the manager of the person's manager in the position, and so on.	A business process definition includes an *Approval Chain* step. You don't configure organization-based routing. Your company uses this hierarchy: • Organization AAA is the superior organization of Organization AA. Organization AA is the superior organization of Organization A. • Organization BBB is the superior organization of Organization BB. Organization BB is the superior organization of Organization B. • James is a worker in Organization A and reports to Betty. Their positions are in different organization hierarchies. • Betty is a manager in Organization A, and the position reports to Logan in Organization BB. • Logan is a manager in Organization BB, and the position reports to Steve in Organization BBB. • Tony is a manager in Organization AA, and the position reports to Chris in Organization AAA. For business processes related to James that use position-based routing, Workday routes the *Approval Chain* step to Betty, Logan, and Steve.
When you select the Enable Enhanced Position-Based Approval Chain Routing check box on the Edit Tenant Setup – Business Processes task to use the enhanced routing functionality, Workday consistently evaluates approvers in the approval level and routes the business process step.	Fred is in Organization 7100, and he reports to James and Betty. The management hierarchy levels are: • Level 1: James and Betty. James also reports to Betty. • Level 2: Betty and Yumiko. Betty reports to Yumiko in Organization 7000.

Use Case	Details
	• Level 3: Yumiko and Jake. Yumiko reports to Jake in Organization 2000. • Level 4: Jake and Steve. Jake reports to Steve in Organization 1000. • Level 5: Steve is the CEO. Using the enhanced position-based routing, Workday routes the *Approval Chain* step to each level for approval. In level: • 1: James and Betty receive the step. James approves the step, and it routes to the next level. • 2: Betty and Yumiko receive the step. Yumiko approves the step, and it routes to the next level. • 3: Only Jake receives the step. The step doesn't go to Yumiko because she previously approved. Jake approves the step, and it routes to the next level. • 4: Only Steve receives the step. The step doesn't go to Jake because he previously approved. Steve approves the step, and the approval chain ends. If the management hierarchy changes while an *Approval Chain* or *Consolidated Approval Chain* step is in progress, an approver might be skipped. Workday recommends selecting a constrained role-based security group for *Approval Chain* and *Consolidated Approval Chain* steps on your business process definition if you enable the enhanced position-based routing functionality.

When you enable the Enable Enhanced Position-Based Approval Chain Routing check box and use these report fields in a report, we process and return values consistently:

- Workers Possibly Assigned Next. Example: The report field returns the same set of managers based on how Workday routes the *Approval Chain* step.
- Workers Possibly Assigned Next Excluding Delegates.
- Workers Possibly Assigned Next On Behalf Of.
- Workers Possibly Assigned Next On Behalf Of with Retained My Tasks Access.

Workday recommends that you update condition rules, if needed, based on the values these report fields return.

Not Required Approval Chain Steps

When an approver approves an *Approval Chain* or *Consolidated Approval Chain* step in a previous level and the approver is also an approver in a later level, Workday marks the step as *Not Required*. Workday doesn't generate a custom business process notification for the *Not Required* step.

Related Information

Concepts

Concept: Approval Chain Step on page 973

Concept: Consolidated Approval Chain Step on page 979

2022R2 What's New Post: Organization-Based Routing for Approval Chains

Reference: Actions Available on Business Processes

You can take a variety of actions on business processes in Workday. You typically initiate these actions when you receive an item in your My Tasks. However, you can also initiate an action directly from the business process itself.

These task actions can be available for your My Tasks items. This table doesn't list actions that are related to approval steps for specific business processes (such as *Title Change)*.

Task Actions	Description
Fix	The business process definition isn't valid. Create a new business process definition or fix the existing business process definition, and then click Restart Business Processes in Error.
On Hold	The business process is on hold and can't be processed. This might occur when you have another event that must be completed before you can complete this event. The only action that you can take after opening the business process is to open the other event.
Reassign	There isn't a worker to perform the current step because the role required by the business process definition is unfilled. You must reassign specific steps in the business process definition so that the business process has valid role assignments for each step. You can reassign the unassigned task directly to a worker, or you can assign a worker to the role. You can reassign business process steps to a person with a non-worker role, such as a student or extended enterprise learner. You can also reassign a step to a terminated worker if they have an active Workday account. But you can't reassign steps to a person that doesn't have an active Workday account, like a candidate. If a user wants to reassign a business process step directly to another worker, but doesn't have the appropriate security group membership to reassign tasks, they can access the Request Reassignment task.
Skip This Task	When you skip a business process step, Workday doesn't process any data as part of that step. If you complete an Optional step and the business process is sent back and this step is skipped, any data you entered as part of this step isn't processed. When a business process step is saved for later, you won't be able to use the Skip This Task action on the step.

These actions are available directly from a business process, either by clicking a button on a business process step or as a related action on the business process itself. This table doesn't list actions that are related to approval steps for specific business processes (such as *Title Change*).

Action Available from Business Process	Description
Approve	Approves the previous step in the business process. The business process then continues to the next step.

Action Available from Business Process	Description
	An approver of a business process can add additional approvers to an event while the business process is in progress only when: • The business process allows ad hoc approval. • Security groups are configured for the Ad Hoc Approve action on the business process security policy. On the toolbar of a My Tasks item, you can click the 3 dots and select Add Approvers to add additional approvers to a business process step. In the Additional Approvers prompt, you can select 1 or more users who you want as approvers for the event (in addition to yourself). Note: The prompt displays all role types, such as a Service Center Representative and Student. This enables you to select a wider range of roles applicable to your organization to approve a business process step. You can only select users that belong to security groups granted permissions to the Ad Hoc Approve action on the business process security policy. The contextual security groups displayed in the prompt are context-sensitive to the event target, not to the user taking action on the business process. The Ad Hoc Approve action is available on review steps of a business process in which you can add or change data, as well as *Action*, *Approval*, and *Consolidated Approval* steps of a business process. The Add Approvers option isn't available on *Approval Chain* and *Consolidated Approval Chain* business process steps. On the business process definition, you can access the Maintain Step Conditions task from the related actions menu of an *Action* step to enable the Enable Validation Conditions for Add Approvers check box. If you select the check box on an *Action* step, Workday triggers validation conditions when reviewers add additional approvers on the step. Selecting the check box provides you with the ability to maintain data integrity and prevent additional approvers from approving incorrect information. To trigger the validation conditions, there must be: • A security group for the Ad Hoc Approve action on the business process security policy. • At least 1 validation condition for the *Action* step. If you currently use report fields in a validation condition rule that requires reviewers to add an approver before submitting an *Action* step, don't select the Enable Validation Conditions for Add Approvers check box on the *Action* step. Example: Ad Hoc Approval Count report field. If you want to enforce this rule, Workday recommends that you select the check box on the *Action* step and remove the validation condition that uses those report fields. After the *Action* step, configure an *Approval* step with a report field that requires an additional approver in an entry condition rule.
Cancel	Immediately ends the business process. To restart the business process, you must submit the process again and redo all previously completed steps. Canceling a subprocess after the completion step of the parent business process immediately ends the subprocess, but the parent business process continues to run. Use the Rescind action to cancel a business process after the completion step.

Action Available from Business Process	Description
Close	Closes the business process window after you've taken an action, such as Approve, Deny, or Submit.
Correct (Related Action)	Enables you to correct the details of a business process event to fix data entry errors or react to changes. You can correct a business process event as many times as needed. In many cases, you can correct a business process event out of order without rescinding subsequent business process events as long as you keep the sequence of events in the same order.
Deny	Immediately ends the business process. To restart the business process, you must submit the process again and redo all previously completed steps. When you deny a subprocess before the completion step of the parent business process, both the subprocess and the parent business process are immediately ended. Denying a subprocess after the completion step of the parent business process immediately ends the subprocess, but the parent business process continues to run. You can deny a business process or task only when: • The business process allows the Deny action. • Security groups are configured for the Deny action on the business process security policy.
Don't Accept	Forwards the step to a reviewer who then decides if the process goes back to a previous step for revisions or moves forward and skips the user who didn't accept. This action is only available when you configure redirect on a *Review Documents* step on the *Offer* business process. When you click Don't Accept on the My Tasks item, the security group or configured user receives a redirected My Tasks item and can select a redirect action.
Reassign Steps	Reassigns the business process step (or steps) to a worker in the appropriate role.
Rescind (Related Action)	Reverses a completed business process. When you rescind a business process, it also rescinds any other business processes that were called as actions. All data is restored to the state they were in before this business process instance ran.
Save for Later	Save input for this business process step so that it can be reviewed or changed later. The data you entered reappears when the business process step is reopened. However, the data isn't submitted until you click Submit. If you save the business process step for later, Workday removes the My Tasks item from all other recipients.
Send Back	Members of a designated security group can send the current step back to: • A prior *Action* step. • The *Initiation* step in the parent business process. • Prior *Approval* steps in business process types for which *Allow Send Back to Prior Approval* is enabled. • Prior *Generated Documents* steps. • Prior *Review Documents* steps.

Action Available from Business Process	Description
	• Prior *Questionnaire* steps. A step can also be sent back to the *Initiation* step of any sibling of the current business process. When you send back an event to a worker that has a future-dated business process that changes their worker type, such as from a contingent worker to an employee, Workday sends the event back to the assigned worker. The step doesn't go unassigned. Example: James is a contingent worker and his contract ends on 2023-09-10. The company submits the business process to hire him as a staff employee. The hire process completes and effective 2023-09-15, his role changes to a staff employee. On 2023-09-08, James submits an I-9 form. On 2023-09-14, an HR Partner sends back the I-9 form to James to correct. He receives the sent back task on 2023-09-15.

Related Information

Concepts

Concept: Business Process Management on page 1055

Tasks

Reassign Tasks on page 1053

Configure Redirect on Business Process Steps on page 1001

Business Process Step Types

Concept: Action Step

An action is a separate business process or review that initiates when a step runs. In the Action/To Do/Checklist/Integration column, use the prompt to select one of the business processes available to this organization.

The processes from which you can select vary, depending on the business process you are editing. Only actions that make sense are available. The action you specify here has to complete before the next step can start.

Note:

If a business process launches more than 25 subprocesses of the same business process, Workday runs these subprocesses in batches of 25 at a time. Although Workday assigns the next step to the appropriate worker when the subprocesses have completed running, the Next Step on the confirmation page is not displayed if all of the subprocesses have not yet completed running.

This issue can occur when running the *Move Workers* business process, but might occur in others depending upon how you configure your business processes.

You can use an *Action* step to create documents such as employment agreements and offer letters using customizable templates. When you add an *Action* step to the business process definition, you can select Generate Document as an allowed action from the Specify prompt. When you generate documents, you can also use a *Review Documents* step to distribute them. Each *Review Documents* step enables you to distribute 1 generated document. When you add a *Review Documents* step, the *Action* step must precede it in the business process definition. You must configure the *Action* and *Review Documents* steps when you add them to a business process definition. You can assign the *Generate Document* action step to any security group that is on the initiating actions of the business process where a *Generate Document* action step is added.

You can't include *Generate Document* in *Consolidated Approval* and *Consolidated Approval Chain* step types.

You can add a *Generate Document* action step to model business processes that you create in Workday Extend.

Note: To enable Workday Extend, contact your Customer Base Account Executive. Workday Extend is a separate product (SKU) that requires a separate license. Workday Extend enables you to build, deploy, and share apps that run on Workday and are tailored to the specific business needs of your enterprise.

A Review action is similar to an approval, except that the reviewer can make changes to the business process. See Concept: Approval Step.

An *Action* step can have a validation condition where you set the severity of the validation to either block a step from exiting or allow a step to continue. To add a validation condition to an *Action* step, you must add the validation condition directly to the *Action* step of the business process definition.

You can configure validation conditions on an *Action* step by accessing the Maintain Step Conditions related action.

On the Maintain Step Conditions task, you can enable the Enable Validation Conditions for Add Approvers check box. When you select the check box on the *Action* step, Workday triggers validation conditions if reviewers add additional approvers on the step. Selecting the check box provides you with the ability to maintain data integrity and prevent additional approvers from approving incorrect information. To trigger the validations conditions, there must be:

- A security group for the Ad Hoc Approve action on the business process security policy.
- At least 1 validation condition for the *Action* step.

If you currently use report fields in a validation condition rule that requires reviewers to add an approver before submitting an *Action* step, don't select the Enable Validation Conditions for Add Approvers check box on the *Action* step. Example: Ad Hoc Approval Count report field. If you want to enforce this rule, Workday recommends that you select the check box on the *Action* step and remove the validation condition that uses those report fields. After the *Action* step, configure an *Approval* step with a report field that requires an additional approver in an entry condition rule.

You can configure an *Action* step so that it doesn't deliver notifications to My Tasks by accessing the Maintain My Tasks Display related action. The Maintain My Tasks Display task enables you to configure a business process step you identify as high-volume from displaying in My Tasks.

Related Information

Concepts

Concept: Step Conditions on page 960

Concept: Exclude Business Process Steps from the My Tasks on page 1065

Concept: Manage a Worker's My Tasks Items on page 1064

Concept: Review Documents Step on page 985

Tasks

Configure Generated Documents on page 1122

Concept: Add Documents Step

Workday enables you to add documents as attachments to the *Employment Agreement* and *Offer* business processes to distribute to selected candidates. Example: Health insurance package. The attachments will be part of the business process and don't require you to preconfigure them in the business process configuration.

Employment Agreement and *Offer* are currently the sole business processes supporting the *Add Documents* step.

Key Features	• Requires you to enable attachments in the Edit Tenant Setup - Business Processes task. • Requires you to configure each *Add Documents* step before the *Review Documents* step in the business process. Example: *Add Documents*: Step b, *Review Documents*: Step c. • Workday doesn't support Adobe Sign or DocuSign eSignature integrations types for the *Add Documents* step. • Any instructional text from the Add Documents task will overwrite the preconfigured text in the Review Documents configuration. • You can purge Add Documents attachments associated with a candidate profile or job application.

The *Add Documents* inherits the security policy from the *Initiation* step of the parent business process. Users with permission to edit in the Attachment Settings in BP Toolbar section have access to the supplementary documents.

If you cancel the parent business process of an *Add Documents* step, either while the step is in progress or after completion, Workday also cancels the *Add Documents* subprocess.

Delegation and Reassignment

You can delegate an *Add Documents* My Tasks item to another user according to your tenant delegation settings if the security policy of the parent business process enables delegation. If you delegate your entire My Tasks, your delegate will receive the *Add Documents* task in their My Tasks as long as the security policy of the parent business process enables delegation.

You can use the Manage Delegations task to delegate the *Employment Agreement* or *Offer* business process with the *Add Documents* step. The selection of available delegates depends on your tenant delegation settings and security.

You can request reassignment of an *Add Documents* My Tasks item to another user. They must belong to a security group that has access to the *Initiate* action on the parent business process.

To use the Reassign Task for *Add Documents*, you must be a:

- Business Process Administrator.
- Member of a security group with access to the Reassign Tasks action on the security policy of the parent business process type.

Related Information

Reference

2023R1 What's New Post: Add Documents to Offers and Employment Agreements

Examples

Example: Add Documents to Job Offer

Concept: Approval Chain Step

An *Approval Chain* step is a sequence of approvals on a business process that starts with an individual, then routes to the selected role for that person. The approval continues up the chain until the step reaches the top of the chain or meets an exit condition.

To determine the next-level approver of the step, you can configure the *Approval Chain* step to route based on:

- Management hierarchy. Workday routes the step to the manager of the person's position, then to the manager of the person's manager in the position, and so on. Workday bases all event routings on the person's position. By default, Workday uses position-based routing to route approval chain steps if you don't enable organization-based routing.

  On the *Approval Chain* step, select the role-based security group that the approval chain follows. Workday notifies everyone in the role specified in that security group that they have a task to approve.

  You can enable the Enable Enhanced Position-Based Approval Chain Routing check box on the Edit Tenant Setup - Business Processes task to consistently evaluate all approvers in each level of an *Approval Chain* business process step when a person reports to 1 or more managers in their position. Workday recommends that you consider enabling this enhanced position-based approval chain routing functionality even if people in your organization might not have multiple managers. When you configure an *Approval Chain* step on your business process definition, select a constrained role-based security group for the step.
- Organization hierarchy. Workday routes the step to the manager of the person's organization, and then to the manager of the second-level organization. Workday then routes the step to the manager of the third-level organization, and so on, up the organization hierarchy.

  To configure organization-based routing, access the Maintain Advanced Routing task from the related actions menu of the business process step. On the task, select the Organization-Based Routing check box. On the *Approval Chain* step, you can only select constrained role-based security groups. Workday recommends that you select a security group with access rights configured for the current organization and unassigned subordinates.

When an approver selects:

- Deny, Workday terminates the business process and doesn't save any changed data.
- Send Back for an *Approval Chain* step, Workday sends the step back to a specific person in the approval chain. You can send the step back to any step that preceeds the *Approval Chain* step.

When you use an *Approval Chain* step, you typically select *Manager* in the security group for that step. When you create a custom business process notification for the *Approval Chain* step, select *Awaiting Persons* from the Recipients prompt. When you select *Manager* as the recipient, Workday sends a notification to the employee's manager for every approval chain level. By selecting *Awaiting Persons* instead of *Manager*, you force the notification to move up the approval chain.

Workday marks the approval chain step as *Not Required* when:

- You enable organization-based routing.
- An approver approves an *Approval Chain* or *Consolidated Approval Chain* step in a previous level.
- The assignee is also an approver in a later level.

Workday doesn't generate a custom business process notification for the *Not Required* step.

When you need a series of approvals not included in the same approval chain, use separate, sequential *Approval* steps.

When the management chain changes after you initiate an event, Workday routes the approval to the next person in the updated management chain.

Approval Chain for Multiple Managers

Workday routes the *Approval Chain* step up the management chain of all of the person's managers, regardless of which manager initially approves the step, when:

- You don't enable organization-based routing on the step.
- The person has multiple managers for a single position.

- You select *Manager* in the security group for the step.

Workday recommends that you don't configure a While-Running condition when an approval chain includes multiple managers.

Example: Albert has a position that reports to 2 managers, Bob and Brenda. Bob reports to Carla, and Brenda reports to Donald.

- When Bob initially approves the step, Workday routes the approval chain to both Carla and Donald.
- When Brenda initially approves the step, Workday routes the approval chain to both Carla and Donald.

If a person has multiple positions, and you select *Manager* in the security group for the *Approval Chain* step, for position-based routing:

- Without a routing modifier configuration, Workday routes the *Approval Chain* step up the management chain of the primary position, additional positions, or all positions. Workday routes the step depending on the position-based routing configuration. If you don't enable position-based routing, Workday routes the *Approval Chain* step up the management chain of all positions.
- With a routing modifier configuration, Workday routes the *Approval Chain* step up the management chain of that position.

When a person has multiple positions and you enable organization-based routing, Workday routes the *Approval Chain* step to all managers for the organization unless you configure a routing modifier on the step.

Approval Chain for Managers with Multiple Positions

Workday routes the *Approval Chain* step to the manager of the person's position, then to the manager of the manager's position that manages the person, and so on when:

- You don't enable organization-based routing on the step.
- The person's direct manager has multiple positions. Example: The manager is on an international assignment.
- You select *Manager* in the security group for the step.

Workday bases all event routings on the person's position.

Workday routes the approval chain based on the position of the manager assigned to the person's organization's manager role. Example: The manager is on an international assignment and manages a person in their host country. If the manager's home country position has been assigned to their host country person's organization, Workday routes the person's *Approval Chain* step to the manager's home country but not to their host country.

Workday applies the approval chain routing to all security groups with Approve permission on the business process security policy of the event.

When a person has a manager with multiple positions and you enable organization-based routing on the step, Workday routes the *Approval Chain* step to the person's manager in the organization. Then, it goes to the manager in the next level of the organization, and so on.

Related Information

Concepts

Concept: Approval Chain Routing on page 963

Concept: Consolidated Approval Chain Step on page 979

Reference

2022R2 What's New Post: Organization-Based Routing for Approval Chains

Concept: Approval Step

Approval

An *Approval* step gives the designated approver the opportunity to approve or deny the entire business process. You can use the Business Process Steps tab when you edit a business process definition to configure approval settings. Use the Group column to control which security group (usually a role-based security group) performs the approval. Workday notifies everyone in that group that they have an approval.

Note: You must check the All check box for an *Approval* step or the notification disappears from everyone's My Tasks when 1 person in the role approves of the request.

When 1 person approves all *Approval* steps, Workday displays *Automatic Approval* for the remaining steps.

Example: Step b is an *Approval* step. Step c is also an *Approval* step. Both steps are awaiting Betty to approve. When Betty approves step b, Workday displays step c as *Automatic Approval*.

When an approver selects:

- Deny, Workday terminates the business process and restores the changed data to its original state.
- Send Back for an *Approval* step, Workday displays options to send the step back to prior steps in the parent process including the *Initiation* step and *Approval* steps in business process types for which Allow Send Back to Prior Approval is enabled. Approvers also can send the process back to the *Initiation* step of any sibling of the current process. Example: A manager wants to send back an item to an employee during the performance appraisal process.

  When a parent process is sent back to a step before the subprocess step, Workday changes the status of the subprocess to *Revised*. You can't send a business process step back to the *Parent* of the parent process or to a particular step in a sibling process.

When you send back a step, the comment you enter displays for the prior approver.

You can use Routing Restrictions in the business process to exclude Prior Approvers or the Event Subject, but you can't reroute the step to someone else. When you configure the restrictions to skip everybody eligible to receive the step, Workday skips the step and specifies it as *Not Required*.

When you enable delegation for the sent back step, Workday sends the step back to the delegate, not to the delegator. Similarly, when you reassign a step, Workday reassigns the step to the previous assignee.

You can configure an *Approval* step so that it doesn't deliver notifications to My Tasks by accessing the Maintain My Tasks Display related action of the business process step.

Additional Approvers

An approver of a business process can add additional approvers to an event while the business process is in progress only when:

- The business process allows ad hoc approval.
- Security groups are configured for the Ad Hoc Approve action on the business process security policy.

Example: A manager's Manager approving a new position as part of the *Create Position* business process might decide that they need to send this particular request to the General Manager for additional approval to create this position.

On the toolbar of a My Tasks item, you can click the 3 dots and select Add Approvers to add additional approvers to a business process step. In the Additional Approvers prompt, you can select 1 or more users who you want as approvers for the event (in addition to yourself).

Note: The prompt displays all role types, such as a Service Center Representative and Student. This enables you to select a wider range of roles applicable to your organization to approve a business process step.

You can only select users that belong to security groups granted permissions to the Ad Hoc Approve action on the business process security policy. The contextual security groups displayed in the prompt are context-sensitive to the event target, not to the user taking action on the business process.

The Ad Hoc Approve action is available on review steps of a business process in which you can add or change data, as well as *Action*, *Approval*, and *Consolidated Approval* steps of a business process. The Add Approvers option isn't available on *Approval Chain* and *Consolidated Approval Chain* business process steps.

Added approvers can perform these actions on business process steps:

- Deny.
- Delegate.
- Reassign.
- Send Back. An added approver can send back a task to an *Action* step and to *Approval* steps in business process types for which Allow Send Back to Prior Approval is enabled. When an added approver sends back a task, the original approver must manually add the added approver back to the workflow as an ad hoc approver for the second iteration of the business process.

Consolidated Approval

A *Consolidated Approval* means approving 1 or more selected steps at a time. Unlike the other approvals, it doesn't approve the entire business process. Configure the *Consolidated Approval* step after you add it to a business process definition. You can configure the step by selecting Business Process > Configure Consolidated Approval from the related actions menu of the step.

Mass Approval

This type of step is only available for business processes that deal with multiple organizations. Examples include Accounting Journal Intercompany Event, Create Project, and Spend Authorization. With the *Mass Approval* step, the approver gets 1 My Tasks approval notification for all the organizations, and can select individual organizations to approve or deny.

Related Information

Concepts

Concept: Step Conditions on page 960

Concept: Exclude Business Process Steps from the My Tasks on page 1065

Tasks

Set Up Multiple Position Routing on page 1046

Edit Business Process Security Policies

Concept: Batch/Job Step

You can specify that a batch process or a job run as a business process step by adding a *Batch/Job* step type and specifying which batch process or job to run.

You can only configure a *Batch/Job* step on business process definitions that allow it. Example: The *Close Job Requisition (Default Definition)* business process. As an HR Administrator, you want to close a job requisition that still has several active candidates. On the *Close Job Requisition (Default Definition)*, the business process administrator configures a *Batch/Job* step and specifies the Decline Remaining Candidates for Close Job Requisition batch process. Workday automatically declines all the unhired candidates when you close the job requisition.

By default, batch processes and jobs are set to run synchronously, which means that the associated business process step doesn't complete until the batch process or job completes. However, you can configure the batch process or job to run asynchronously. In this case, the step is considered complete when it is reached, allowing the subsequent step to execute before the batch process or job completes.

To configure a *Batch/Job* step for asynchronous execution, select Business Process > Configure Batch/Job Step from the related actions menu of the business process step, and then select Don't wait for this step to complete, move immediately to the next step.

Concept: Checklist Step

A *Checklist* is a type of step in a business process. It’s a group of *To Dos*, or external tasks for users in specific security groups. Example: You can create a checklist for a new hire's first day at your organization with mandatory tasks for managers and the Facilities team. These items might include assigning a desk to the new hire, or sending a Welcome announcement.

A *Checklist* step can be optional or mandatory to continue to the next step in a business process.

When you create or edit a business process, and you specify a *Checklist* step type in the Type column, you can either select an existing *Checklist* or create your own using the Create Checklist task.

Concept: Complete Questionnaire Step

Use the *Complete Questionnaire* step type to distribute questionnaires to users as part of a Workday business process. This enables you to gather relevant information during the business process.

Users receive questionnaires as My Tasks items.

When you add a *Complete Questionnaire* step to a *business process definition*:

- You can select any security group to assign to the step.
- You must assign at least 1 security group to the step.

Click the Configure Questionnaire button on the *Complete Questionnaire* step to select a questionnaire and associate it with that business process step.

To distribute a questionnaire to multiple teams, add a *Complete Questionnaire* step for each team and route each step to the appropriate security group.

When a business process definition contains a *Complete Questionnaire* step that hasn't been configured, Workday displays an error message prompting you to run Configure Questionnaire.

When you enable autocomplete on a business process definition, Workday skips the *Complete Questionnaire* step.

Questionnaire Administrators determine which questionnaires can be associated with a business process while they are creating or editing a questionnaire. Selecting the appropriate Questionnaire Type and Allowed on Business Process options makes a questionnaire available in the corresponding business processes.

- Workday prompts you to select an Effective Date when you configure the *Complete Questionnaire* step. The default effective date is the current date.

  Workday also prompts you to select a Time Zone if you selected the Business Process Configuration Time Zone option on the Edit Tenant Setup - System task. The default time zone is the user's current time zone.

  - When you enter the current date in the specified time zone, the changes take effect immediately. Users in other time zones see the changes immediately.
  - When you enter a future date in the specified time zone, the changes take effect at midnight on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.
  - When you enter a past date in the specified time zone, the changes take effect at 11:59:59 PM on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.
- Questionnaires associated with a different business process type are not available from the prompt.

- Select Allow Questionnaire Response Correction to enable subsequent participants in the business process to correct responses to the questionnaire. This option is only available if the functionality is enabled by Workday for that business process type.
- You can enter a Step Label Override for Workday to display in the My Tasks of any users who must complete the questionnaire as part of the business process. The Step Label Override is also displayed when you view the Process History of the business process.

When you copy a business process definition that includes *Complete Questionnaire* steps, Workday copies the *Complete Questionnaire* steps as well as the step configurations and the associated questionnaires to the new business process definition. However, if a questionnaire is inactive or isn't allowed for that business process, Workday doesn't copy the questionnaire or the step configuration to the new business process definition.

The user can edit their existing answers before they resubmit the questionnaire when the user:

- Clicks Save for Later before completing all of the answers in a questionnaire.
- Completes all of the answers in a questionnaire and the business process is sent back.

Completed questionnaires are archived in a user's My Tasks after the questionnaire is submitted or skipped, or if the business process is canceled or rescinded.

Editable questionnaires that are associated with a *Complete Questionnaire* step in a business process definition can no longer be edited after an event is initiated.

Related Information

Concepts

Concept: Questionnaires on page 1110

Tasks

Steps: Configure Questionnaire Security Segments on page 1109

Configure Questionnaires and Questions on page 1105

Concept: Consolidated Approval Chain Step

A *Consolidated Approval Chain* step combines the properties of a *Consolidated Approval* step and an *Approval Chain* step. You can add the step to a business process definition and configure it by selecting Business Process > Configure Consolidated Approval from the related actions menu of the step.

When you configure a *Consolidated Approval* step or a *Consolidated Approval Chain* step, Workday displays a critical exception if the approval policy of related subprocesses don't include the same security groups as the consolidated approval step. You can run the Business Process Exception Audit report to view a list of critical exceptions and take action to resolve them.

To determine the next-level approver of the step, you can configure the *Consolidated Approval Chain* step to route based on:

- Management hierarchy. Workday routes the step to the manager of the person's position, then to the manager of the person's manager in the position, and so on. Workday bases all event routings on the person's position. By default, Workday uses position-based routing to route approval chain steps if you don't enable organization-based routing.

  You can enable the Enable Enhanced Position-Based Approval Chain Routing check box on the Edit Tenant Setup - Business Processes task to consistently evaluate all approvers in each level of a *Consolidated Approval Chain* business process step when a person reports to 1 or more managers in their position. Workday recommends that you consider enabling this enhanced position-based approval chain routing functionality even if people in your organization might not have multiple managers. When you configure a *Consolidated Approval Chain* step on your business process definition, select a constrained role-based security group for the step.

- Organization hierarchy. Workday routes the step to the manager of the person's organization, and then to the manager of the second-level organization. Workday then routes the step to the manager of the third-level organization, and so on, up the organization hierarchy.

  To route with an organization-based hierarchy, you can access the Maintain Advanced Routing task from the related actions menu of the business process step. On the task, select the Organization-Based Routing check box. On the *Consolidated Approval Chain* step, you can only select constrained role-based security groups. Workday recommends that you select a security group for the step that has access rights configured for the current organization and unassigned subordinates.

Related Information

Concepts

Concept: Approval Chain Step on page 973

Concept: Approval Chain Routing on page 963

Reference

2022R2 What's New Post: Organization-Based Routing for Approval Chains

Concept: Edit Additional Data Step

To update effective-dated custom objects on effective-dated business objects, you can include *Edit Additional Data* steps in any of these business processes:

Business Object	Business Process
Academic Appointment Track	*Add Academic Appointment* *Update Academic Appointment*
Employee Contract	*Edit Employee Contract Additional Data Event* *Employee Contract*
Job Requisition	*Edit Job Requisition Additional Data* *Job Requisition* *Job Requisition Change*
Learning Course	*Manage Course*
Learning Course Offering	*Manage Course Offering*
Learning Program	*Manage Program*
Position Restrictions	*Create Position* *Edit Position Restrictions* *Edit Position Restrictions Additional Data*
Worker	*Change Job* *Contract Contingent Worker* *Edit Worker Additional Data Event* *End Contingent Worker Contract* *Hire* *Termination*

When *Edit Additional Data* is a step within an overall business process, Workday creates event lites under the new event lite type of Custom Object Effective-Dated Change. When an action event contains 1 or more *Edit Additional Data* work flow steps:

- Before the event completes, Workday creates 1 event lite and 1 corresponding transaction log lite with an entry moment that matches the parent event when the event completes, regardless of how many steps you include.
- After the event completes, Workday creates 1 event lite and 1 corresponding transaction log lite with an entry moment of the step when it completes. Post completion *Edit Additional Data* steps have a different entry moment than the parent event.

When you correct an *Edit Additional Data* step, Workday creates 1 event lite entry and a corresponding transaction log lite entry.

Workday creates an event lite in the transaction log when you update effective-dated custom objects using a standalone business process.

When you correct the effective date of a business process event, Workday creates an additional Transaction Log Lite entry with the previous effective date and the entry moment. The original correction entry with the new effective date remains in the transaction log.

To verify or audit the values of Workday custom objects, use the transaction log to find instances of Custom Object Non-Effective-Dated Change - Event Lite Type. The event lite type includes the changed custom object name, the owning instances, and who changed the custom object and when the change occurred. It doesn't include details describing the actual changes to the custom object data.

If you need to retrieve custom object data from Workday for use in an external system, you can query the transaction log for current custom fields values.

Using Business Processes and Custom Objects

Use a business process to edit custom field data on effective-dated custom objects. You can only select custom objects that support effective-dated business objects.

To view or update effective-dated custom objects on a business object outside of staffing business processes, use 1 of these standalone business processes:

- *Edit Employee Contract Additional Data Event*
- *Edit Job Requisition Additional Data*
- *Edit Position Restrictions Additional Data*
- *Edit Worker Additional Data Event*
- *Update Academic Appointment*

Set up an *Edit Additional Data* step for each effective-dated custom object. You can only route this business process step to security groups that have permission to access the selected custom object.

- When you have the required business process security, select Additional Data > Edit Effective-Dated Custom Object from the related actions menu of the Workday object. Enter an effective date. Workday applies the date to all custom objects that you add or update.
- To view the effective-dated custom objects, select Additional Data > View All As Of from the related actions menu of the Workday object.

Note: You can configure step label overrides on *Edit Additional Data* business process steps.

For *Edit Additional Data* steps routed to you:

- You can edit only active custom fields for a custom object.
- When you submit the *Edit Additional Data* step, Workday evaluates any custom object validations. When it detects invalid data, it displays an error message.
- You can only delegate an *Edit Additional Data* step to a member of a security group that has permissions on the security domains that secure the custom object. On the *Edit Additional Data* items in My Task, the delegate can view details of the event by clicking View Details in the gear icon.

Workday skips the *Edit Additional Data* steps when you submit 1 of these business processes through either:

- A web service with auto-complete enabled.
- An EIB using the Automatic Processing option.

You can modify the custom field data while the business process is in progress. To modify the data after the business process is complete, select Business Process > Correct Additional Data from the related actions menu of the business process. To modify data, you must have permissions on the:

- *Correct* action in the business process security policy.
- Security domains that secure the custom object.

Snapshots for Effective-Dated Custom Objects

Individual custom objects don't have separate snapshots. Workday stores the data for all custom objects for a business object on the same snapshot. When a new effective-dated snapshot is created, Workday copies the data from the previous snapshot as a starting point. Workday copies the data for all custom objects even when the custom object has a step in the business process that creates a new effective-dated snapshot.

When a later-dated effective date for custom data exists, your changes aren't carried forward to it. Make the same changes for every subsequent effective date. When Workday displays an alert warning you of a later-dated effective date, apply the same changes to the effective date indicated in the alert.

When a business process event invokes an *Edit Additional Data* step, Workday creates an effective dated snapshot. When multiple business processes that update custom data are in process at the same time for the same business object, some changes might be lost if these are in conflict:

- Event effective dates.
- Snapshot creation time.
- Event completion order.

When you rescind any *Edit Additional Data* events, ensure that custom data is restored correctly by rescinding the events in reverse effective-date order. Example:

1. Rescind the latest effective date first, including future-dated events.
2. Rescind subsequent events that updated 1 or more custom objects from the latest date backwards.
3. If any events completed with an out-of-order effective date, reapply updates to custom data after all the events back to the latest effective date are rescinded.

The value of an inactive or removed field remains in existing snapshots, but the value is not copied to new snapshots and will not be visible on a new snapshot. Note that a new snapshot can be created by a different business process that updates the custom objects.

Use the View Out of Order Custom Object Changes task to:

- Compare custom data across multiple effective dates.
- Identify effective dates added or updated when a later effective date with custom data already exists.
- Update incorrect custom data by using the links provided in the grid.
- View custom data for out-of-order effective-dates.

The View Out of Order Custom Object Changes task is secured to the *System Auditing* domain, but you must also have view access for the domains that secure the custom objects to see the details when you click the links in the grid. Details for custom objects that you don't have view access to won't be visible.

Concept: Initiation Step

A business process always starts with an *Initiation* step. These options are available:

- Submit: Records the current actions taken for this step and enables the business process to continue to the next step.
- Cancel: Cancels the current actions associated with the step and Workday doesn't save or submit data. The step still displays in your My Tasks.
- Save for Later: Saves input for this step for review or changing later. Workday saves data temporarily so that it reappears when you reopen the step. However, Workday doesn't submit the data until you click Submit.

  Example: You might enter a hire date for a new employee that you aren't sure is correct. You can save the step for later and return to it once you've verified the date.

  If you save the business process step for later, Workday removes the My Tasks item from all other recipients.

An *Initiation* step can have a validation condition where you set the severity of the validation to either block a step from exiting or allow a step to continue. Validation conditions are only available on *Initiation* steps when the ability to revise the associated business process is built into the Workday-delivered business process or step.

You can configure validation conditions on an *Initiation* step by accessing the Maintain Step Conditions related action.

Related Information

Concepts

Concept: Step Conditions on page 960

Concept: Integration Step

An integration is a Workday operation that generates an integration file (such as a payroll integration file) for future use by an external trading partner's application, or by another integration. A business process integration step always launches an associated *Integration Process Event* business process for that integration system. When you edit a business process definition with an effective date that's in the future, you can add an *Integration* step but you won't be able to configure the step.

You can select from a list of integrations. Each integration is configured for you and your trading partner. Refer to the integration team that configured your integrations for more information.

When an *Integration* step fails, the entire business process that the *Integration* step belongs to is automatically terminated unless you configure redirect. Example: A network error occurs between your Workday tenant and your integration system. If you don't want the failed *Integration* step to terminate the business process, you can configure redirect on the step. If the step fails, based on the redirect configuration, Workday can either route it to a configured user to take action or advance the business process automatically to the next step. You can set up a redirect on an *Integration* step by accessing the Maintain Redirect related action.

Related Information

Tasks

Create Integration (Step) on page 1018

Configure Redirect on Business Process Steps on page 1001

Concept: Report Step

You can specify that Workday runs any standard or custom report as a business process step by adding a *Report* type step and specifying which report to use.

When the business process runs, the security associated with the report is enforced (that is, the report displays only the information that is secured to the recipient). Therefore, if 2 recipients have access to different report data, then 1 recipient could receive a report with different data than the other recipient.

To specify the output type of the report:

1. Select Business Process > Configure Report Step as a related action on the *Report* step of the business process.
2. Enter the Effective Date. The default effective date is the current date.

3. Enter the Time Zone. The default time zone is the user's current time zone.

   You can only enter a time zone if you selected the Business Process Configuration Time Zone option on the Edit Tenant Setup - System task.

   - If you enter the current date in the specified time zone, the changes take effect immediately. Users in other time zones see the changes immediately.
   - If you enter a future date in the specified time zone, the changes take effect at midnight on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.
   - If you enter a past date in the specified time zone, the changes take effect at 23:59:59 on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.
4. Click the Output tab. These output types are available:

   - Excel
   - Report (PDF)
   - Business Form (PDF)

     If you select Business Form (PDF) as the output type, select the report layout to use from the drop-down list.

You can select both report designs, in the form of Report Designer design files or XSLT-based layouts from the drop-down list. However, note that Workday plans to retire XSLT layouts for custom reports in favor of report designs created in Report Designer in Workday Studio. For more information, see the *Retired Functionality Reference* on Workday Community.

When a report runs as a business process step, its output is sent automatically to My Reports, rather than being displayed immediately. You can optionally create a *To Do* step within the business process that consolidates the links to one or more reports within a single *To Do* step. On the business process definition, add the *To Do* step after the *Report* step. Both *Report* and *To Do* steps should route to the same person, otherwise the report won't display to them. Make sure that you select a To Do that has the Show Report Document check box selected. When the check box is enabled, Workday provides a link to reports and displays the report on the *To Do* step. You can edit an existing To Do by accessing the Maintain To Dos task.

You can also configure the business process not to wait for a *Report* step to complete, but to move immediately to the next step in the business process.

Concept: Report Group Step

Workday provides a *Report Group* step to enable users to share instances of reports or tasks among other users. The business process follows the report group configuration to select the users to share the reports or tasks with, as well as the output type.

When you add a *Report Group* step to a *business process definition*, you need to select or create a Report Group.

When you select a Report Group, the business process generates one instance of each report that is contained within the group. Each report instance is then associated with the appropriate security group that should have contextual access to the report output. In addition, the Run As User value is populated with the owner of the Report Group.

You can't configure the security group to which a *Report Group* step can be routed.

To configure a Report Group step:

1. Select Business Process > Configure Report Group Step as a related action on the business process step.

2. Enter the Effective Date. The default effective date is the current date.

   When you first configure a *Report Group* step, you can't change the effective date. However, you can select an Effective Date on any subsequent occasion when you configure the *Report Group* step.
3. Enter the Time Zone. The default time zone is the user's current time zone.

   You can only enter a time zone if you selected the Business Process Configuration Time Zone option on the Edit Tenant Setup - System task.

   - If you enter the current date in the specified time zone, the changes take effect immediately. Users in other time zones see the changes immediately.
   - If you enter a future date in the specified time zone, the changes take effect at midnight on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.
   - If you enter a past date in the specified time zone, the changes take effect at 11:59:59 PM on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.

On the Report Criteria tab, you can select the Value Type and Value for each report field. On the Output tab, select the number of days after which the report output file is deleted, and whether or not to output an empty report.

You can also configure the business process definition to not wait for a *Report Group* step to complete, but to move immediately to the next step in the business process.

Related Information
Tasks
Group Reports

Concept: Review Documents Step

The *Review Documents* step type enables you to use a business process to distribute documents to workers.

All documents distributed by Workday business processes are effective dated. Example: A document is effective as of the original hire date for a worker. You upload a first version of the document for 2022 and a second version that's effective as of January 1, 2023. Workday displays the original version of the document for workers hired in 2022, even when they view the document in 2023.

You can use the Relaunch Review Documents task (secured to the *Business Process Administration* domain in the System functional area) to relaunch any *Review Documents* step with a status of In Progress or Failed.

Select this task as a related action from a business process with an awaiting *Review Documents* step configured for an eSignature Integration. Then select the *Review Documents* step to troubleshoot. This task:

- Cancels completed eSignatures, deactivates links to documents on the eSignature provider server, and cancels documents for that step on the eSignature provider server.
- Resends the documents to the eSignature provider server, and restarts the integration beginning with the first signature group.

Add Documents to Workday

Use the Create Document task to add documents to Workday. The task enables you to:

- Upload a document directly as an attachment.
- Create a template for a dynamically generated document.
- Link to a document on an external site.
- Verify that the content and URL on the external site are current.

Workday recommends that you avoid using attachments to process Personally Identifiable Information (PII). You can't purge attachments.

Each *Review Documents* step enables you to distribute multiple static documents and 1 generated document.

When you configure a *Review Documents* step on a business process definition and enable the Attachment Required option, a document is required for the step. After a document is added during the *Review Documents* step and the event is completed, canceled or rescinded, the business process administrator can select Business Process > Manage Attachments from the related actions menu of the event to manage attachments. The business process administrator can remove the document. However, when a document is required the business process administrator must add another document to replace it.

Workday enables you to:

- Obtain acknowledgments or electronic signatures from workers for documents.
- Enable or require a worker to upload a document to Workday.
- Add conditions to determine when a document is available for review.
- Report on the status of documents in a business process.
- View all uploaded documents on the Documents tab of the Full Process Record of the business process.

Documents workers upload are only available in the Worker Document File when the worker has electronically signed them and the distributing business process is worker-related. Example: *Hire*, *Onboarding*, and *Request Leave of Absence*.

Obtain Electronic Signatures

Workday captures this information when you electronically sign a document without using an eSignature Integration Type:

- The worker who submitted the *Review Documents* step.
- The date and time when you submitted the My Tasks task.

Workday logs this information in the Full Process Record of the business process step and also in the Worker Document File for worker-related business processes. Workday doesn't store the IP addresses of users submitting My Tasks tasks.

For verification reasons, email addresses ending in .edu and other school-issued domains can cause problems when attempting to sign documents through Adobe on the *Review Documents* step. If a signer is unable to access or sign a document, Workday recommends they provide a different account email address, or sign the document outside Workday and process the document manually.

Include Report Output

You can include report output as part of a *Review Documents* step by selecting a custom or standard report from the Document prompt.

You can only select 1 report output type document per *Review Documents* step. When you select a report output type document, you can select the Report Criteria, Output Type, and Report Output Sharing options. You can also select Report Tags and specify a system user with access to the report to generate the report output.

Specify a system user on the Run As User tab to provide the correct access for report generation when you configure the *Review Documents* step with a report and either:

- Route the step to the Candidate as Self security group.
- Use an eSignature integration type.

You can share the report output with other users in constrained security groups. When the business process reaches the *Review Documents* step, the report runs using the permission of the recipient on the *Review Documents* step. Workday stores the resulting document in the Worker Document File for the recipient.

Authorized users belonging to a security group you configure on the *Review Documents* step can access the report output in the recipient's Worker Document File when the recipient:

- Acknowledges or signs the report output.
- Is the subject of the business process event.

If you sign in to Workday as a proxy, you can't access the report output in the Worker Document File of the recipient. Only authorized users can access the Documents tab of the Full Process Record of the parent business process event.

Configure Review Document Steps to Redirect a Declined Document

Workday enables you to redirect a *Review Documents* step only from certain business processes. For these business processes, you can enable users to decline a *Review Documents* step. When users decline, Workday redirects the documents to a configured security group for review. The reviewer selects whether to move the documents forward to the next step or send them back to a previous step for revision. Example: Changes to an offer letter or employment agreement.

Use the Business Process Configuration Options report to verify that a business process enables redirect for *Review Documents* steps.

Configure Review Documents Step to Use E-sign by Adobe Sign

You can configure documents for Adobe Sign in the *Review Documents* step by selecting E-sign by Adobe Sign as the eSignature Integration Type. The data retention period for Adobe is independent of Workday. Workday recommends that you set the retention period to at least 6 weeks. Otherwise, when the retention period expires, the documents will be purged from Adobe storage cloud and will no longer be retrievable by Workday.

You can't add condition rules to a document that you configure for Adobe Sign.

You can't delegate, but you can reassign *Review Documents* steps configured to use Adobe Sign. You can view these steps in the Business Process Tasks not Delegated report.

When you reassign a *Review Documents* step that's configured to use Adobe Sign:

- Workday removes the My Tasks task from the My Tasks of the initial assignee, and disables their signing URL.
- Adobe generates a signing URL for the new assignee.
- Workday adds the My Tasks item with the newly generated signing URL to the new assignee's My Tasks.
- Workday updates the Full Process Record and the Worker Document File to reflect the new assignee as the signer of the document if they sign the document.
- Workday replaces the initial assignee with the new assignee on the Check eSignature Status task.

You can't reassign a task when all the roles in a signature group are unassigned. Assign the role, and then access the Relaunch Review Documents task to restart the process. Reassignment isn't retained after you run Relaunch Review Documents. Workday returns the task to the initial assignee's My Tasks.

Any user to whom you reassign the task must have an email address in Workday. More than 1 signer on the step can't use this email address. You can't reassign a task:

- More than once.
- To a user who is already part of a signature group for that step.
- From a user who is part of a prior signature group for that step.
- In which a user has signed but not yet submitted a document.

When you manually advance a *Review Documents* step configured for Adobe Sign, Workday disables the signing URL and cancels the document with Adobe.

If you select the Remove Documents Awaiting eSignature When Document is Canceled option on the Edit Tenant Setup - Business Processes task, Workday removes the document from the Adobe server.

When you manually advance a business process to completion past a *Review Documents* step configured for Adobe Sign, Workday doesn't send the document to the Adobe server, and Adobe doesn't generate a signing URL.

When you electronically sign a document using Adobe Sign, Adobe stores your IP address in its signature log.

If there are multiple documents on a single Review Documents step, you can't electronically sign each document using Adobe Sign.

When your administrator uploads multiple files to send in one distribution, merging of files can occur depending on your Adobe Sign configuration. This means that, when you configure multiple documents on a single *Review Documents* step, Workday appends the eSignatures only to the last document of the series as it is displayed at the time of signing. If you want a signature on each page, Workday recommends that you add Adobe signature tags to every document on the step to ensure that every document that requires a signature has one (See Adobe Sign's documentation regarding text tags for more information). Adobe Sign offers various configuration options regarding signing multiple documents in one transaction. Please refer directly to Adobe's documentation for more information about this functionality.

When you merge a candidate with a worker and the candidate has a pending Review Documents task, Workday removes the pending Review Documents task if you're using E-sign by Adobe Sign as the eSignature Integration Type. Workday recommends that after a merge, you use the Review Documents task to add the step again.

Configure Review Documents Step to Use E-sign by DocuSign

You can configure DocuSign on the *Review Documents* step by selecting E-sign by DocuSign as the eSignature Integration Type.

You can't add condition rules to a document that you configure for E-sign by DocuSign.

You can delegate a business process that has *Review Document* steps with E-Sign by DocuSign configured. The delegated user receives a My Tasks notification and can switch accounts, but they cannot sign the documents.

Example: In their My Tasks, a manager can switch accounts to a worker who has a *Review Documents* step that has E-Sign by DocuSign configured and is awaiting action. The manager can view the My Tasks item, but they cannot sign the document.

When you manually advance a business process to completion past a *Review Documents* step configured for DocuSign, Workday doesn't send the document to the DocuSign server, and DocuSign doesn't generate a signing URL.

Related Information
Concepts

Concept: Action Step on page 971

Tasks

Configure Redirect on Business Process Steps on page 1001
Set Up DocuSign on page 1338
Set Up Adobe Sign on page 1337
Set Up Review Documents Steps on page 377

Concept: Service Step

A *Service* step is similar to an *Action* step in that it creates a separate processing thread. For example:

- The *Auto-Manage Business Processes* service enables you to configure Workday to automatically take action on business processes based on the rules you define for the step. You can add this service step multiple times, and on these business processes:
  - *Change Job*
  - *End Contingent Worker Contract*
  - *Request Leave of Absence*
  - *Termination*
- The *Create Workday Account* service automatically creates a user account from the User Name Rule and emails a temporary password to the new user.
- The *Create Case* service automatically creates and assigns a Workday Help case.
- The *Document Delivery* service transports an integration output file to an external server.
- The *Step Configuration Placeholder Service* is a generic step that you can add to your business process definition. This step is useful when you want to add a step delay, configure custom notifications, or add other configurations before or after another step that doesn't allow certain configurations.

  Example: There are 3 steps in a business process definition: *Initiation*, *To Do* (assigned to the HR Administrator group), and *Approval* (assigned to the Security Administrator group). An HR administrator completes the *To Do* step. They are in the Security Administrator security group, so the *Approval* step is approved automatically. In this case, the business process administrator wants to prevent automatic approval, so they add a *Step Configuration Placeholder Service* service step between the *To Do* step and the *Approval* step.

Related Information

Concepts

Concept: Auto-Manage Business Processes for a Worker on page 1063

Tasks

Steps: Set Up Auto-Manage Business Processes Service Step on page 1049

Concept: Shared Participation Step

Shared participation steps enable specific participants to perform actions in a business process step without moving the business process to the next step. Only roles with access to the controller action in the business process security policy can move the business process to the next step. Shared participation steps also enable improved collaboration between participants for business process types that have this functionality enabled.

The role assigned to the shared participation step (the controller) in the *business process definition* performs the participant control event. Each participant performs a participant detail event.

When a shared participation step is launched, participants are notified of their involvement in the business process. Depending on each participant's role, they might be required to perform specified actions. Each of these actions is a participant detail event. But completing any or all of the participant detail events doesn’t move the business process forward to the next step. The controller must submit the participant control event to move the business process to the next step.

You can add a shared participation step to a business process definition only if Workday has configured at least 1 allowed action for that business process type to enable participant-based workflow. When you add a shared participation step to a business process definition:

- You can only specify allowed actions for which participant-based workflow is enabled.
- You can only add security groups configured for the controller action in the business process security policy.

After you save a business process definition that contains a shared participation step, click Configure Participation to select:

- The Effective Date. The default effective date is the current date.

- The Time Zone. The default time zone is the user's current time zone.

  You can only enter a time zone if you selected the Business Process Configuration Time Zone option on the Edit Tenant Setup - System task.

  - If you enter the current date in the specified time zone, the changes take effect immediately. Users in other time zones see the changes immediately.
  - If you enter a future date in the specified time zone, the changes take effect at midnight on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.
  - If you enter a past date in the specified time zone, the changes take effect at 23:59:59 on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.
- The Organization Type to Use.

  This option isn't available if:

  - Workday hasn't specified an Organization type for shared participation steps.
  - Custom organizations aren't allowed.
- The security Group of the participants who perform the participant detail events. The prompt displays only groups with Modify permissions on the domain security policy of the Participant Domain, configured by Workday for that business process type.

  This option isn't available if:

  - Workday hasn't specified an Organization type for shared participation steps.
  - Custom organizations aren't allowed.

You can also:

- Specify that all participants who meet these criteria must complete the participant detail event.
- Add a step label override that displays in My Tasks items of the participants.

Under Participant Detail Step Delay, you can select for participant detail events:

- A report field that the Delay Is Based On.
- An Additional Calculated Delay.

If you copy a business process definition that contains a shared participation step, Workday also copies the participant configuration for that step.

If you change a shared participation step to another step type (such as an *Action* step or an *Approval* step), Workday deletes the participant configuration for that step.

You can use the Maintain System Notifications task on the Notifications tab on the business process definition to disable system notifications on shared participation steps. This prevents Workday from sending system notifications to the controller or to participants. Workday displays notifications that are associated with a participant detail event on the Full Process Record of that participant detail event, not of the participant control event.

You can configure shared participation steps to have future effective dates, and apply condition rules to shared participation steps.

You can configure help text on a shared participation step. You can either:

- Select Business Process > Maintain Help Text as a related action on the business process definition.
- Select Business Process > Maintain Step-Help Text as a related action on the shared participation step.

You can specify if you want help text to display on the participant control event or the participant detail event, and define different help text for the controller and for participants.

The controller can use My Tasks delegation to delegate the participant control event to another user according to their tenant delegation settings. Access the Manage Delegations task to select a delegate and configure the delegation. Workday sends a system notification to the delegate to let them know they're acting on behalf of the delegator.

The controller can also:

- Submit the step and move the business process forward even if all participant detail events aren't submitted.

  The state of tasks that aren't submitted is shown as Manually Advanced on the Details tab of the events, and each task is removed from the participant's My Tasks.
- Cancel the step. All participant detail events are canceled including the tasks that are submitted.

  The state of each task is shown as canceled on the Details tab of the event, and each task is removed from My Tasks of the participant.
- Pull Forward a participant detail event that isn't submitted.

  The state of the task is shown as Manually Advanced on the Details tab of the event. And the task is removed from My Tasks of the participant.

Members of security groups with permission to Reassign Tasks in the business process security policy can reassign participant detail events for users they support. Business Process Administrators can also use Reassign Tasks to reassign participant detail events on behalf of other users.

Participants in a shared participation step can use the gear icon in the My Tasks item to:

- Delegate a participant detail event to another user according to their tenant delegation settings. Workday sends a system notification to the delegate to let them know they're acting on behalf of the delegator.
- Reassign the task to other users in the configured security group for the shared participation step. Recipients of a reassigned task receive the task in their My Tasks. But they can only see other participants who they're contextually secured to view.

After a participant in a shared participation step submits a participant detail event, the event displays on the Archive tab of the participant's My Tasks. When selected, Workday displays a detail view of the participant detail event.

If the controller or another user pulls forward a participant detail event or submits the participant control event:

- All participants can view the participant detail event on the Archive tab of their My Tasks.
- The controller can't view the pulled forward participant detail event on the Archive tab of their My Tasks.

If a business process definition contains a shared participation step, and you enable the Disable Comments option on the business process security policy:

- Workday suppresses comments in the business process toolbar when you submit the shared participation step or any participant detail events.
- Workday doesn't suppress Activity Stream comments for participant detail events.

When the Disable Comments setting is different on the Edit Tenant Setup - Business Processes task and the business process security policy, Workday will honor the most recent setting change that was made to either the Edit Tenant Setup - Business Processes task or the business process security policy.

Example: On 2020-05-16, you access the Edit Tenant Setup - Business Processes task and clear the Disable Comments check box. On 2020-06-15, you access the business process security policy and select the Disable Comments check box. Then, on 2020-06-20, you edit a field on the Edit Tenant Setup - Business Processes task. Workday will respect the Disable Comments setting on the Edit Tenant Setup - Business Processes task because this task was most recently updated. This means disabling comments won't be enabled.

When you make changes to the Edit Tenant Setup - Business Processes task, the business process security policy audit trail doesn't display any changes made to the Edit Tenant Setup – Business Processes task. Similarly, when you make changes to the business process security policy, the Edit Tenant Setup - Business Processes audit trail doesn't display changes made to the business process security policy.

Workday recommends that you review both the Edit Tenant Setup - Business Processes task and business process security policy audit trails so you can see all changes made to these settings.

Related Information

Tasks

Maintain Step Delay on page 1015

Concept: Tasks Step

The *Tasks* step type enables you to configure multiple relevant tasks in a single step, and presents these tasks as separate sections on a single screen.

To add a *Tasks* step to a business process, all of the tasks in the business process step must be available in both guided and summary editor modes. Guided and summary editor modes refer to a guided style of user interaction, in which an overall task is used to direct multiple tasks into a single user experience.

Note: Internal tasks related to Guided Editor and Summary Editor toolbar actions might display in the results when you run an Audit Trail Report.

To add or remove a task from a *Tasks* step, select Business Process > Configure Step Tasks from the related actions menu of the step.

Workday prompts you to select an Effective Date for the *Tasks* step. The default effective date is the current date.

Time Zones

Workday also prompts you to select a Time Zone if you selected the Business Process Configuration Time Zone option on the Edit Tenant Setup - System task. The default time zone is the user's current time zone.

- If you enter the current date in the specified time zone, the changes take effect immediately. Users in other time zones see the changes immediately.
- If you enter a future date in the specified time zone, the changes take effect at midnight on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.
- If you enter a past date in the specified time zone, the changes take effect at 11:59:59 PM on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.

Help Text

Although you can configure help text on the overall *Tasks* step by selecting Business Process > Maintain Step-Help Text from the step's related action menu, you can also configure help text and instructional text for each individual task using the View Business Process Template report:

- Click the Configure Help Text button for the appropriate section on the Section Groups tab.
- Click the Configure Instructional Text button on the Instructional Text tab.

If a condition rule is configured on a specific task, you can view a description of the condition rule for that task in the Comments column of the appropriate section on the Section Groups tab.

Related Information

Concepts

Concept: Business Process Templates on page 1024

Concept: To Do Step

A *To Do* is an independent task that you can add as a step to a business process. Example: As part of the hiring process, a new hire completes and submits a W-4 form.

You can group *To Dos* into *Checklists* and add them as steps to business processes.

Use the Maintain To Dos task to create, edit or delete a *To Do*. You can also use this task to change the To Do's instructional text, which Workday displays in the My Tasks item.

You can use the Edit To Do task to directly edit To Do details. You can access it from the Maintain To Dos task or the To Dos report by selecting To Do > Edit from the related actions menu on any To Do item.

You can use the To Dos report to view each defined *To Do* and where it’s used. You can also use a mass action to cancel *To Do* steps.

Note: You can only delete *To Dos* that aren’t currently being used by a business process.

You can use the Maintain To Dos task to associate a Security Assertion Markup Language (SAML) configuration with a *To Do*. When you add a *To Do* step to a business process definition, you can only select these *To Dos* from the prompt:

- To Dos without an associated SAML configuration.
- To Dos with an associated SAML configuration that doesn’t require context (the Business Object to Evaluate Fields for SAML Attributes prompt is empty on the Edit SAML SSO Link task).
- To Dos with an associated SAML configuration that does requires context, which is available for that business process type.

Use the Maintain My Tasks Display related action to configure a *To Do* step so that it doesn't deliver notifications to My Tasks.

Select the Show Report Document check box to provide a link to reports initiated by business process steps. If you want to use this setting on a *To Do* step, add the *Report* step before the *To Do* step on the business process definition. Make sure both steps route to the same person, otherwise the report won't display to them.

Related Information
Concepts
Concept: Exclude Business Process Steps from the My Tasks on page 1065

Customize Business Processes

Setup Considerations: Hide Business Process History Details from Person

You can use this topic to help make decisions when planning your configuration and use of the Hide Business Process History Details functionality. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

What It Is

Workday enables you to hide business process history details from the person associated with the business process, such as an internal employee. Other users, such as their manager, can still view the business process history as long as they aren't the person associated with the business process.

When the Hide Process History from Person check box on the business process security policy is checked, Workday doesn't display the business process history to the person associated with the business process on the:

- My Tasks item that the person receives.
- Process history that's embedded in documents, such as an expense report.
- Process tab on the View Event page.
- View Remaining Process page. (We won't display Business Process > View Remaining Process from the related actions menu of the event.)

Workday hides the process history for business processes that are:

- Completed.
- In progress.

When you select the Hide Process History from Person check box on the business process security of a:

- Parent business process, we only hide the process history of the parent business process. We continue to display the process history of subprocesses. If you access the process history of the parent business process, in some cases we hide the process history of subprocesses. Example: You enable the functionality on the *Start Performance Review* business process but not on its subprocesses. The person associated with the performance review can view the process history on the *Complete Manager Evaluation for Performance Review* subprocess but not the details of the *Start Performance Review* business process.
- Subprocess, we only hide the process history of the subprocess. We continue to display the process history of the parent business process. Example: On the *Start Performance Review* business process, you enable the functionality on subprocesses such as the*Complete Self Evaluation for Performance Review*. But you don't enable the functionality on the parent *Start Performance Review* business process. The person that's associated with the performance review can't view the *Complete Self Evaluation for Performance Review* subprocess history but can still view the *Start Performance Review* business process details.

Business Benefits

The Hide Business Process History functionality helps prevent:

- The person that's associated with the business process from viewing sensitive information and details that might be captured in the business process history.
- Potential legal issues in your organization when users view sensitive information in their My Tasks item or in the event details.

Use Cases

- An HR partner doesn't want internal employees viewing information related to their performance review and the action managers might have taken on the business process.
- Internal audit might need to review expense reports for potential fraud or other non-compliance reasons. For expense reports that are under investigation, you don't want the expense payee (the person associated with the business process) to see who is reviewing their expense report.
- Your organization doesn't want candidates viewing information in the Offer business process.

Questions to Consider

Do you want to prevent users associated with a business process from viewing sensitive information in their My Tasks item or in the event details? On the associated business process security policy, consider selecting the Hide Process History from Person check box. By default, the Hide Process History from Person check box is unchecked.

Recommendations

When you enable the Hide Process History from Person check box on business process security policies, make sure you activate the security policy changes immediately. Otherwise, Workday displays a Hide Process History from Person entry on the Pending Changes for Business Process Security Policy report until you access the Activate Pending Security Policy Changes task to activate the changes.

To hide business process history details from the person associated with subprocesses in a parent business process, make sure you select the check box on the subprocess security policy.

Requirements

To enable this functionality for a business process, you must:

- Select the Hide Process History from Person check box on the business process security policy.
- Access the Activate Pending Security Policy Changes task to activate the change.

Limitations

The hide business process history functionality doesn't work with model component business processes that you create in Workday Extend.

When the event isn't about a person and the Hide Process History from Person check box is checked on the business process security policy, we won't hide the business process history. Example: You select the check box on the *Job Application* business process security policy. Since the *Job Application* business process is about the application and not a person, Workday displays the business process history.

For some business processes, we might not hide the business process history from the person that the business process is about even when you select the check box.

Note: If you enable this functionality on a business process and the person associated with the business process can still view the process history, contact Workday Support.

Tenant Setup

No impact.

Security

To hide business process history details from the person associated with the business process, you must select the Hide Process History from Person check box on the business process security policy and then activate the pending security policy changes.

Business Processes

To use the functionality, select the Hide Process History from Person check box on the business process security policy. By default, the check box isn’t checked

Reporting

You can use these report fields in custom reports:

- Hide Process History from Person Enabled: To report on business process security policies that have the check box enabled.
- Person Related to Event: To report on the person associated with the business process and the process history is hidden from.

Integrations

No impact.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Steps: Configure Business Process Definitions

Context

A *business process definition* is the list of tasks that comprise a business process in addition to the roles responsible for completing each task. Depending on your scenario, you might want to set up additional configurations on your business process. Example: When your business process definition includes an *Approval* step, you might want to configure a custom notification on the *Approval* step so that Workday notifies approvers of their action.

Steps

1. Edit Business Processes on page 1005.
2. From the related actions menu of the business process, select Business Process > Rule Based Calendar Configuration.

   Configure calendars and condition rules to determine which calendars Workday uses when you initiate a business process. When you select a work schedule and a holiday calendar, Workday considers holidays when calculating due dates.

   Security: *Business Process Administration* domain in the System functional area.
3. Configure Redirect on Business Process Steps on page 1001.
4. From the related actions menu of a *Consolidated Approval* or *Consolidated Approval Chain* step, select Business Process > Configure Consolidated Approval.

   Select the steps that you want to include on the approval page.

   Security: These domains in the System functional area:

   - *Business Process Administration*
   - *Manage: Business Process Definitions*
5. From the related actions menu of a *Mass Approval* step, select Business Process > Configure Mass Approval.

   Select Wait for All Events when you don't want the My Tasks notification to display until all prerequisite events are complete. When you leave this box unchecked, the approval notification displays immediately, but organizations with incomplete events display as *In Progress*.

   Security: These domains in the System functional area:

   - *Business Process Administration*
   - *Manage: Business Process Definitions*
6. Create Business Process Condition Rules on page 1011.
7. (Optional) From the related actions menu of an *Action* step, select Business Process > Maintain Step Conditions.

   Select the Enable Validation Conditions for Add Approvers check box. If the *Action* step supports ad hoc approvers, Workday triggers validation conditions when reviewers add additional approvers on the business process step. To trigger validation conditions when a reviewer clicks Approve and Send to Approvers in the My Tasks item, there must be:

- A security group for the Ad Hoc Approve action on the business process security policy.
- At least 1 validation condition for the *Action* step.

When you don't select the Enable Validation Conditions for Add Approvers check box on the step, and if reviewers add additional approvers on the business process step, Workday continues to add the approvers. Validation conditions won't trigger.

The Enable Validation Conditions for Add Approvers check box isn't available for *Action* steps that initiate a subprocess.

Security: These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*

8. From the related actions menu of the business process step, select Business Process > Maintain Step Delay.

   Configure the delay time for the step.

   Security: These domains in the System functional area:

   - *Business Process Administration*
   - *Manage: Business Process Definitions*
9. Hide or Require Optional Fields on page 1020.
10. From the related actions menu of the business process step, select Business Process > Maintain Advanced Routing.

    Configure advanced routing options for the step.

    To route *Approval Chain* and *Consolidated Approval Chain* steps with an organization-based hierarchy instead of by management hierarchy (position-based routing), select the Organization-Based Routing check box.

    Security: These domains in the System functional area:

    - *Business Process Administration*
    - *Manage: Business Process Definitions*
11. From the related actions menu of the business process, select Business Process > Maintain Help Text.

    Select a step and enter the help text. Select a condition rule to display different help text to different audiences.

    To configure help text on a business process step, the functionality must be enabled on the business process. You can access the Business Process Configuration Options report and view the Allows

Help Text column to determine if the business process allows configuring help text. You can configure help text on the following business process step types:

- *Action*
- *Approval*
- *Approval Chain*
- *Checklist*
- *Consolidated Approval*
- *Consolidated Approval Chain*
- *Edit Additional Data*
- *Initiation*
- *Review Documents*
- *Shared Participation*
- *Tasks*
- *To Do*

Security: *Business Process Administration* domain in the System functional area.

12. Create Custom Notifications on page 1091.
13. From the related actions menu of a validation message, select Validation > Configure Validation Message.

    Enter validation text to display to users. Validation messages only display on steps that have condition rules.

    Security: These domains in the System functional area:

    - *Business Process Administration*
    - *Manage: Business Process Definitions*
14. Select either:
    a) Business Process > Maintain Related Links by Definition from the related actions menu of the business process.
    b) Business Process Type > Maintain Related Links from the related actions menu of the business process type.

    Configure related links. Include *http://* or *https://* in the URL.

    Security: These domains in the System functional area:

    - *Business Process Administration*
    - *Manage: Business Process Definitions*
15. Embed Related Worklets in Business Processes on page 1018.
16. From the related actions menu of the business process step, select Business Process > Maintain Step Label Override.

    Enter a new label for the step.

    Security: These domains in the System functional area:

    - *Business Process Administration*
    - *Manage: Business Process Definitions*
17. Access the Maintain Business Process Definition Selection report.

    To change a subprocess effective date to the date the business process initiates the subprocess, select a business process and click Enable Subprocess Definition Selection. The subprocess effective date is the effective date of the parent business process by default.

    Security: *Business Process Administration* domain in the System functional area.

Next Steps
(Optional) To hide business process history details from the person associated with the business process, such as an internal employee, access the business process security policy and select the Hide Process History from Person check box. Then, activate pending security policy changes.

Note: The hide business process history functionality doesn't work with model component business processes that you create in Workday Extend.

Example: An HR partner wants to prevent internal employees from viewing information related to their performance review and the action managers may have taken on the business process. The business process administrator configures the *Start Performance Review* business process to hide the business process history. When a step in the business process is awaiting the employee in My Tasks, Workday doesn't display the process history when the employee views the item.

Related Information
Concepts
Concept: Order of Execution on page 959

Steps: Set Up Rule-Based Business Process Definitions

Prerequisites

Security: *Business Process Administration* domain in the System functional area.

Context

You can create business process definitions that:

- Are based on condition rules.
- Aren't constrained solely by organizations.

Workday selects the appropriate business process definition based on your configuration. You can configure rule-based business process definitions to:

- Follow a different path depending upon the role of the initiator.
- Support different process flows for different functional situations.

Rule-based business process definitions enable you to:

- Update a specific business process definition without affecting any of the other definitions for that business process.
- Optimize business process definitions to meet specific business requirements.

You can create a hierarchy of condition rules that determine which rule-based business process definition Workday selects at runtime. Workday stops processing condition rules when the first rule is satisfied.

Steps

1. From the related actions menu of the business process, select Business Process > Copy or Link Business Process Definition.

   Select the Rule Based Workflow Definition Name option, and enter a name for the rule-based business process definition.

   Security: *Business Process Administration* and *Manage: Business Process Definitions* domains in the System functional area.
2. Edit Business Processes on page 1005.

   Create a custom definition for the rule-based business process.

3. Select either:
    - Business Process > Rule Based Business Process Configuration from the related actions menu of the business processes.
    - Business Process Type > Rule Based Business Process Configuration from the related menu of the business process type.

    Select or create a condition rule and select the rule-based workflow definition that Workday uses when the condition rule is satisfied.

    Security: *Business Process Administration* and *Manage: Business Process Definitions* domains in the System functional area.

Result

Workday evaluates each condition rule in order beginning with the first.

- Workday uses the corresponding rule-based business process definition when the condition rule is satisfied.
- Workday evaluates the next condition rule when the condition rule isn't satisfied.
- Workday uses the business process definition configured for the organization to which the event target belongs when no condition rule is satisfied.

Related Information
Concepts
Concept: Rule-Based Business Process Definitions on page 1026
Tasks
Steps: Set Up Auditing on page 696
Reference
The Next Level: Rule Based Business Process

Steps: Set Up Task Consolidation

Context

Set up task consolidation security so you can consolidate tasks into a single workbook and complete them at once.

Example: You want to consolidate offer and propose compensation events.

When you consolidate tasks into a workbook, Workday prevents you from accessing those tasks in My Tasks. If you delete a task from a workbook, Workday makes it available in My Tasks again.

You can't consolidate tasks that another person has delegated to you, or that you've delegated to another person.

If a workbook contains purged candidates or job applications, Workday hides any personally identifiable data related to candidates and business process comments.

Steps

1. Edit Domain Security Policies.

    Grant security groups Modify access for these domains in the System functional area:

    - *Consolidate Tasks*, for Public Groups and Unconstrained Groups.
    - *Drive*, for All Role-Based Groups, Public Groups, and Unconstrained Groups.

    Grant security groups View and Modify access on the *Worksheets* domain for All Role-Based Groups, Public Groups, and Unconstrained Groups.

2. Edit Business Process Security Policies.

   Select the Consolidate Tasks check box to enable task consolidation on the business process security policy.
3. Activate Pending Security Policy Changes.

Next Steps

Access the Consolidate Tasks report to consolidate available tasks.

Related Information

Concepts

Concept: Managing Workbooks

Tasks

Steps: Set Up Task Consolidation for Offers

Steps: Set Up Task Consolidation for Employment Agreements

Reference

Reference: Workbook Actions Available Based on Permissions

2020R1 What's New Post: Consolidated Tasks for Employment Agreements

Workday 33 What's New Post: Consolidated Tasks for Offers

Configure Redirect on Business Process Steps

Prerequisites

Permissions for the Redirect action in the Who Can Do Actions on Entire Business Process section of the business process security policy for appropriate security groups.

Security: These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*

Context

You can route failed or rejected business process steps to a specified security group.

When you set up redirect on:

- An *Integration* step, Workday either routes the step to a configured user or advances the business process automatically to the next step when the step fails. For redirected *Integration* steps, Workday won't automatically terminate the business process when the step fails. Example: The step fails because a network error occurred between your Workday tenant and your integration system.
- A *Review Documents* step, Workday routes the step to a configured user when a user selects Don't Accept on the step. You can use redirect on *Review Documents* step only on the *Offer* business process. Example: The candidate declines an offer letter.

Steps

1. From the related actions menu of an *Integration* or *Review Documents* step, select Business Process > Maintain Redirect.
2. As you complete the task, consider:

Option	Description
Send Back	Send the business process back from the redirected step to a prior step. The business process restarts from that step.

Option	Description
	Example: You send back a redirected *Review Documents* step to a prior *Action* step. This Send Back option isn't available for *Integration* steps that are after a *Completion* step.
Move to Next Step	Enables security group members to advance the business process to the next step.
Terminate Business Process	Terminate the overall business process, including subprocesses. This option isn't available for a *Review Documents* step and dynamic business processes. Example: *Job Application*.
Rerun Integration	Rerun the *Integration* step that failed. Workday re-evaluates all condition rules on the *Integration* step before rerunning the step.
Security Groups	Workday routes the step to the specified security groups to take action. Workday displays security groups with permissions for the Redirect action on the business process security policy.
Advance Automatically	Workday automatically advances the business process to the next step if an integration fails. This option isn't available for a *Review Documents* step and dynamic business processes. Example: *Job Application*.

Result

When Workday redirects a step, the security group or configured user receives a My Tasks item and can select a redirect action.

When an *Integration* step fails and you have configured manual redirect options such as *Send Back*, *Move to Next Step*, *Terminate Business Process*, or *Rerun Integration*, the Process History displays these entries:

- The *Integration* step that failed displays a status of Failed.
- The new *Redirect: Integration* step displays a status of Awaiting Action.

When an *Integration* step fails, and you configured the *Automatically Advance* redirect option, the Process History displays these entries:

- The *Integration* step that failed displays a status of Failed.
- The new *Redirect: Integration* step displays a status of Automatic Complete. In this case, the process automatically moves to the next step.

When a *Review Documents* step is declined and you have configured redirect, the Process History displays these entries:

- The *Review Documents* step that was declined displays a status of Redirected.
- The new *Redirect: Review Documents* step displays a status of Awaiting Action.

Next Steps

You can create custom notifications that trigger on any business process step, or on the status of the business process as a whole. If you want to trigger a notification when a business process is terminated, create a custom notification that triggers on a Denied status.

Related Information

Concepts

Concept: Integration Step on page 983

Concept: Review Documents Step on page 985

Tasks

Create Custom Notifications on page 1091

Create Custom Business Processes

Prerequisites

Security: These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*

Context

Define a custom *business process definition* when you need a workflow that's different from the default business process definition. You can base custom business processes on a configurable condition rule or for a specific organization.

To customize business process definitions, you can either:

- Change the default definition.
- Copy and change the default definition.
- Create a rule-based definition.

Workday recommends that you copy and change the default business process definitions to meet your business needs. If a business process doesn't have a default definition, you can use the Create Business Process Definition (Default Definition) task to create and configure the default definition.

For audit reporting, you can tag instances of business processes. This enables you to track and report on business process configuration changes in your tenant such as when you create a new business process definition.

Steps

1. Select Business Process > Create, Copy, or Link Definition from the related actions menu of the organization.

   When you copy or link to a business process definition, you can't set an effective date that's before the original business process creation date.
2. As you complete the task, consider:

Option	Description
Time Zone	You can enter a time zone if you select *Business Process Configuration Time Zone* on the Edit Tenant Setup - System task. When you select: • The current date, the changes take effect immediately. Users in other time zones see the changes immediately.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td></td><td>A future date, the changes take effect at midnight on the specified date. Users in other time zones see the changes at the corresponding date and time in their time zones.
A past date, the changes take effect at 23:59:59 on the specified date. Users in other time zones see the changes at the corresponding date and time in their time zones.</td></tr>
<tr><td>Copy existing Definition</td><td>Select to create an identical copy of the default definition or another custom definition for use as the basis for your custom business process. Workday adds the for <organization name> suffix, and you can't change it.

Example: If you copy the Hire (Default Definition) business process for the Shipping organization, the custom business process is called Hire for Shipping.

When you copy a business process definition to create a new one and apply an audit tag to it, an audit trail entry for the new business process definition displays in the Audit Trail Report. However, there won't be an audit trail entry in the report for the original business process definition.

When you tag the original business process definition only and run the Audit Trail Report for that tag, you won’t see an entry for the copied (new) business process definition.

However, if you run the Audit Trail Report and select both the original business process definition and the copied business process definition audit tags, you'll see audit trail entries for:
The original business process definition.
The copied (new) business process definition, including entries associated with the copying of the business process definition. You will also see changes you might have made to the new business process definition after it was created.</td></tr>
<tr><td>Link existing Definition</td><td>Select to link to the business process definition in another organization of the same type. Changes you make to the linked business process definition affect the source organization.

Workday recommends that you limit the number of linked business processes because</td></tr>
</table>

Option	Description
	their names don't reflect the organizations that are using them. Example: You work in Purchasing and you link to the *Hire for Shipping (Default Definition)*. Workday creates the linked *Hire for Shipping (Default Definition)+1*, which doesn't reflect the department that is using the linked definition.
None of the above	Select to create a custom business process definition with the same name as the default business process. The definition contains only the *Initiation* step.

Result

Workday recommends that Implementers run the Business Process Exception Audit report after loading factory default definitions to identify integration steps requiring additional configuration.

Workday includes changes you make to default business process definitions in any custom business processes you create using that definition. If you change a default definition without creating a custom business process, the default definition might be overwritten during a product update.

Business process definitions are associated with a business process type. Some configuration changes to the business process type can impact associated business process definitions. The Audit Trail Report will display entries for changes tied to the business process type that affected business process definitions. Also, the report displays all updates in the specified date range even if a newly created business process definition isn't active yet.

Related Information
Tasks
Steps: Set Up Auditing on page 696

Edit Business Processes

Prerequisites

Security: These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*

Context

Workday's default business processes are delivered definitions and can be customized to meet your needs. Default business process definitions contain recommended steps and basic configuration. When a business process doesn't have a default definition, you can use the Create Business Process Definition (Default Definition) task to create and configure the default definition.

You can change a *business process definition* when you need a workflow that's different from the default business process definition. You can base custom business processes on a configurable condition rule or for a specific organization.

To customize business process definitions, you can either:

- Change the default definition.
- Copy and change the default definition.

When you edit a default business process definition and use it for all organizations, you might need to add many customizations, which can make the business process complex and hard to maintain. Workday recommends that you copy default business process definitions and change them for each of your organizations. This enables you to better organize different business process definitions in your tenant that meet your business needs.

When you edit a business process definition with a future effective date and add a new step, the Audit Trail Report might display an audit trail entry with the step name and some details on the report as step-.

Example: Today is 2020-07-15. You add a new *Approval* step to a business process definition with a future effective date of 2020-07-30. When you view the Audit Trail Report, you'll see an audit trail entry for the new *Approval* step and you might see some details as step- on the report.

For optimal business process performance, Workday recommends that you limit the number of steps on a business process definition.

We support a maximum of 72 consecutive, non-manual steps on a business process. A non-manual step is a step that's automatically processed by the system without user interaction. Example: Not required steps, an *Integration* step, or a *Report* step. If you have business processes with 72 consecutive, non-manual steps, Workday recommends that you evaluate the business process definition to reduce the number of these consecutive steps or configure a rule-based business process definition with conditional steps.

Steps

1. Select Business Process > Edit Definition from the related actions menu of the business process.
2. Select an Effective Date for when the business process definition changes take effect.
3. Select a Due Date to reflect the elapsed time from business process initiation to completion.
4. (Optional) In the Suppress Channels for Notifications prompt, select the notification channel to suppress from sending custom and system business process notifications.

   When you select the Mobile Push Notifications prompt option, Workday doesn't send a push notification for any custom and system notifications associated with events for the business process definition.

   We display the Suppress Channels for Notifications prompt on business process definitions regardless of whether you configured push notifications on the Edit Tenant Setup – Notifications task.
5. As you complete the task, consider:

Option	Description
Time Zone	You can enter a time zone when you select the Business Process Configuration Time Zone check box on the Edit Tenant Setup - System task. When you select: • The current date, the changes take effect immediately. Users in other time zones see the changes immediately. • A future date, the changes take effect at midnight on the specified date. Users in other time zones see the changes at the corresponding date and time in their time zones. • A past date, the changes take effect at 23:59:59 on the specified date. Users in other time zones see the changes at the corresponding date and time in their time zones.

Option	Description
Order	Enter 1 or more letters to define the workflow of the business process. The *Initiation* step is *a*, and you can't have another step with the letter *a*. When you save the business process definition, Workday sorts the business process steps alphabetically. Workday enforces the English language for workflow step display and processing.
Parallel Step Order in My Tasks	In each step with the same order, enter 1 or more letters to control the order in which parallel steps in a business process display in My Tasks relative to other parallel steps. Example: On the business process definition, the business process administrator sets up parallel steps in this order: • *ca* • *cb* • *cc* Workday displays the tasks in My Tasks in the opposite order specified in the business process definition if you sort your My Tasks by Newest on Top. The older task (or the next task) is at the bottom of My Tasks, and newer tasks display at the top. To match the parallel step order with the order in which the tasks display in My Tasks, sort your My Tasks by Oldest on Top.
Type	Certain step types also require an entry in the Specify column. Additionally, the Batch/Job and Integration step types require that you specify a user ID in the Run as User column. When you select *Consolidated Approval*, you must complete the approval configuration. You can complete the approval configuration after you finish editing the business process. From the related actions menu of the step, select Business Process > Configure Consolidated Approval. When you select *Approval Chain* or *Consolidated Approval Chain*, you can configure the step to route by organization hierarchy instead of by management hierarchy (position-based routing). You can't change the step type of existing steps when you edit a business process definition. If you want to change the step type,

Option	Description
	you can remove the step and add a new step with a new step type.
Specify	Select the appropriate action for the step type.
Optional	Recipients don't have to complete optional steps. The notification message contains a link that the recipient can click to skip the step. The recipient must either skip or complete an optional step to move the process to the next step. When a recipient saves an optional step for later, the recipient can skip that step. When you set up a notification on an optional step, Workday sends a notification to whomever is configured on the custom notification if the recipient skips the step. You can use the Step Skipped report field to create a condition rule to prevent Workday from sending notifications for skipped steps.
Group	Specify the security groups responsible for this step. Workday displays security groups that the security policy enables. When the step is an *Action* step that initiates another business process, the available security groups are defined by the security policy of the subprocess. You can route certain business process steps to organization roles on either the current organization or a proposed organization. When you add an approval chain step and configure the step to route by organization hierarchy, you can only select constrained role-based security groups.
Routing Modifier	Select a routing modifier. Workday displays this column only if the business process has step types that support routing modifiers. You can use specific group routing for any business process step type if the security group has supervisory organization enabled for the assignable role on the Maintain Assignable Roles task.
All	Select when everyone in all of the specified security groups must complete the step.
Due Date	You can set a due date for the business process as a whole, or on each business process step. Set a due date for the step. This is the elapsed time from when the step starts until the step is complete.

Option	Description
	For users located in time zones of UTC-1 or greater, Workday displays the step’s due date in their local time zone. To determine the due date, we use the end of day (23:59:59) in the Pacific Time Zone (UTC-8) of the system and convert the due date to the user's local time zone. Workday displays the user’s local time zone for the due date in the: • Awaiting Your Action section on the Workday Home page. • My Tasks item. • My Tasks item’s Process History. • Up Next message. • You have submitted dialog box. • Due Date column on theView Event page. Note: This doesn’t apply to users located in time zones of UTC-2 or less. We display the due date in Pacific Time. For due dates that Workday calculates in units of days, Workday uses rule-based calendars you configure on the business process definition to calculate the due date. For business process definitions that don't use a rule-based calendar or calculate the due date in units of days, Workday calculates due dates in consecutive days. When a business process runs as a subprocess, Workday uses the rule-based calendars configured on the business process definition of the subprocess. It doesn't use the rule-based calendars on the parent business process.
Due Date Is Based On Effective Date	You can set a due date for the business process as a whole, or on each business process step. Select the check box for Workday to calculate the step due date based on the effective date of this business process instance. Otherwise, Workday calculates the due date from the moment the prior step completes. Example: The date a pay raise takes effect or the starting date for a new employee can be weeks after the business process completes. Note: If a business process step is configured with a Due Date and the Due Date Is Based On Effective Date check box is also selected

Option	Description
	on the step or the business process definition as a whole, Workday might add 1 additional day to the due date based on how the system persists the effective date of the business process.
Do Not Advance	Select this check box to mark certain steps of manually advanceable business process types as Do Not Advance. If selected, an event cannot be advanced from or through a step that is marked as Do Not Advance. You can use this feature to reduce the risk of issues that may arise due to users manually advancing steps to completion. Note: This functionality is only available for steps that you can assign to a security group. Steps that you can't assign to a security group, with the exception of a *Report* step, can't be marked as Do Not Advance .

Result

Changes you make to a business process definition of a parent organization affect any subordinate organizations that don’t have their own custom business process definition.

When you edit a subprocess definition, the changes don't display in the Audit Trail Report for the parent business process. However, when you clear or select the Use Subprocess Initiation Date check box on a business process definition that's tagged for auditing, you might see additional entries in the Audit Trail Report.

Next Steps

After you finish editing the business process, you can further customize your business process definition such as configuring:

- Advanced routing on *Approval*, *Consolidated Approval*, and *To Do* business process steps. From the related actions menu of the step, select Business Process > Maintain Advanced Routing.
- Organization-based routing on *Approval Chain* and *Consolidated Approval Chain* steps. From the related actions menu of the step, select Business Process > Maintain Advanced Routing. Then, select the Organization-Based Routing check box.
- Step delay on business process steps. From the related actions menu of the step, select Business Process > Maintain Step Delay.
- An *Action* step to trigger validation conditions when reviewers add additional approvers on the business process step. From the related actions menu of an *Action* step, select Business Process > Maintain Step Conditions. Then, select the Enable Validation Conditions for Add Approvers check box.
- A step as a *Completion* step. From the related actions menu of the step, select Business Process > Set as Completion. We display Yes in the Complete column on the business process definition.
- Custom notifications that trigger on any business process step, or on the status of the business process as a whole. You can also delay when a custom notification is sent by configuring a notification delay on your business processes. From the related actions menu of a business process definition, select Business Process > Add Notification.

- Hide business process history details from the person associated with the business process, such as an internal employee. Access the business process security policy and select the Hide Process History from Person check box. Then activate the pending security policy change.

  Note: The hide business process history functionality doesn't work with model component business processes that you create in Workday Extend.

Related Information

Concepts

Concept: Completion Steps on page 963
Concept: Configurable Security
Concept: Effective Dates on page 957
Concept: Time Zone and Due Date on page 958
Concept: Order of Execution on page 959
Concept: Step Conditions on page 960
Concept: My Tasks on page 1209

Tasks

Create Custom Business Processes on page 1003
Create Business Process Condition Rules on page 1011
Maintain Advanced Routing on page 1043
Embed Related Worklets in Business Processes on page 1018
Maintain Specific Group Routing on page 1045
Maintain Step Delay on page 1015
Steps: Set Up Auditing on page 696

Examples

Example: Create Business Process Condition Rules on page 1023

Create Business Process Condition Rules

Prerequisites

Security: These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*

Context

Workday enables you to control they way business processes run by providing the ability to configure condition rules. Condition rules consist of 1 or more conditions that Workday examines when you initiate a business process in the order you specify until it finds a match. You can set up condition rules to check for values that you specify and values with relational operators. Example:

- When you use *And* in a condition rule, Workday stops checking the remaining conditions as soon as 1 condition is false, or not passed.
- When you use *Or* in a condition rule, Workday stops checking the remaining conditions as soon as 1 condition returns true, or passed.

You can optimize performance by putting the conditions you think will most likely trigger a response at the top of the list.

There are several types of condition rules, including alerts and delegations. To set up condition rules for:

- Alerts, use the Create Alert Rule task. Example: For business process or task alert notifications.
- Delegations, use the Create Delegation Rule task. Example: To delegate responsibility for starting business processes or completing My Tasks items.

Steps

1. From the related actions menu of a business process, select Business Process > View Definition.
2. From the related actions menu of a step on the Business Process Steps tab, select Business Process > Create Condition Rule.
3. As you complete the Rule Conditions grid, consider:

Option	Description
( )	Use parentheses to indicate precedence when your statement includes a combination of *And* and *Or* conditions. Example: *(A and B) or C*.
Source External Field or Condition Rule	Displays rules for which all fields used in the condition is relevant to the business process. When you apply a condition rule to the *Initiation* step of a business process, Workday recommends that you select a value other than *Initiator* from this prompt. When you select *Initiator* before Workday initiates the business process, the field returns no results. When you use a report field in a condition rule, Workday doesn't check the domain security of the report field. However, Workday evaluates the security of the report field if the security logic is part of the report field itself. This ensures that the processing user (the person that processed the previous step) passes the security before returning the report field results. If the processing user doesn't have access to fields or values in the next step, the step is skipped.
Comparison Value	To compare to the source, enter a value or select a Comparison Value check box. Example: • *equal to*: Field value is equal to the comparison value. For True, select the check box. • *not equal to*: Field value isn't equal to the comparison value. For True, clear the check box.

Next Steps

Access the:

- Rule Tester report to view a full execution flow of the condition rule to help you understand and troubleshoot condition rule results. The report is:
  - Available from the related actions menu of business process events.
  - Not available for Workday-owned condition rules.

- Edit Condition Rule task to edit or delete condition rules, but consider that:
  - When you edit an alert rule, the changes affect processes that already started.
  - You can't edit or delete delegation rules in use (referenced in any delegation).
  - You can't delete rules that:
    - Workday references in an alert notification.
    - Only ran once.
    - Have expired schedules.
- Object Transporter to migrate condition rules from 1 tenant to another. Example: Test alert rules in your Sandbox tenant, then migrate them to your Production tenant.
- Manage Delegation Settings report to identify which delegation rule your users should select when you set up their delegation.

Related Information

Concepts

Concept: Calculated Fields on page 512

Concept: Act On Behalf Of Another User on page 1075

Concept: Object Transporter on page 776

Concept: Step Conditions on page 960

Tasks

Create Integration Notifications

Edit Business Processes on page 1005

Schedule Alert Notifications on page 1097

Steps: Create Calendars on page 459

Delegate My Tasks on page 1082

Maintain Organization Type Precedence

Context

It is possible to have multiple separate but overlapping hierarchies defined in your enterprise. For example, you could have a functional hierarchy that defines organizations of different job types, such as sales and marketing. At the same time you might also have a separate hierarchy of locations, such as by country or continent.

For example, when you hire a sales person, the position may reside in two organizations. The default definition of the *Hire* business process allows the business process to be associated with both types of organizations. Setting the organization type precedence enables Workday to know where to look first for the business process to use. If it does not find a custom business process defined in that organization, it looks in the organization defined next in the precedence list.

You cannot use the *Link Definition* option to create a link to the business process in the other organization, because the link function works only for organizations of the same type. Setting organization type precedence is specifically for organizations of different types.

Not every default business process definition allows the business process to be attached to multiple organization types.

Steps

1. Access the View Organization Type Precedence for Business Process Resolution report. This report shows only the organization types for which you are allowed to create a custom business process.
2. From the related actions menu of the Business Process Type for which you need to specify an organization type precedence, select Business Process Type > Maintain Business Process Definition Precedence.

3. In the Order column to the right of the list of organization types (displayed in the Role Usage column), use letters to specify the order in which the business processes should be used. The highest priority is the letter a.

Result

When you select a business process to run, Workday looks at organization a first to see if a custom business process is defined. If not, it looks at organization b, and so on. If no custom business process is defined, it uses the default business process definition for organization a.

Configure Rule-Based Business Processes

Prerequisites

Security: *Business Process Administration* domain in the System functional area.

Context

Workday enables business process administrators to configure *business process definitions* based on condition rules.

You can create a hierarchy of condition rules that determine which rule-based business process definition Workday selects at run time. Workday stops processing condition rules when the first rule is satisfied.

Steps

1. As a related action on a business process or business process type, select Business Process > Rule Based Business Process Configuration or Business Process Type > Rule Based Business Process Configuration.

   When you add, remove, or update a condition rule on a rule-based business process, the Audit Trail Report displays an audit trail entry for the actual business process definition that you configured the condition rule on.
2. Select an Effective Date. The default effective date is the current date.
3. Enter the Time Zone. The default time zone is the user's current time zone.

   You can only enter a time zone if you selected the Business Process Configuration Time Zone option on the Edit Tenant Setup - System task.

   - If you enter the current date in the specified time zone, the changes take effect immediately. Users in other time zones see the changes immediately.
   - If you enter a future date in the specified time zone, the changes take effect at midnight on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.
   - If you enter a past date in the specified time zone, the changes take effect at 11:59:59 PM on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.
4. Select a condition rule from the Rule prompt or create a new condition rule.
5. Select the Rule Based Workflow Definition that Workday will use if the selected condition rule is satisfied.
6. Select additional condition rules and rule-based business process definitions as needed. You can only select 1 condition rule for each rule-based business process definition.

Result

Workday evaluates each condition rule in order beginning with the first.

- If the condition rule is satisfied, Workday uses the corresponding rule-based business process definition.

- If the condition rule isn't satisfied, Workday proceeds to and evaluates the next condition rule.
- If no condition rule is satisfied, Workday uses the business process definition configured for the organization to which the event target belongs.

When you initiate a business process but you save it for later instead of submitting it, the business process definition that Workday uses is set at the time you click the Save for Later button. Also, Workday uses the information that's available upon saving the event. When there are fields tied to conditions that are on a rule-based business process definition and the fields don't contain data that satisfy any of the conditions when you save the event for later, Workday bypasses the rule-based business process definitions and uses the default business process definition.

Related Information

Concepts

Concept: Rule-Based Business Process Definitions on page 1026

Tasks

Steps: Set Up Auditing on page 696

Reference

The Next Level: Rule Based Business Process

Maintain Step Delay

Prerequisites

Security: These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*

Context

You can add a built-in delay to a business process step. You can add a delay to a business process step to run the business process in the background until the delay is complete. This is useful for business process steps that frequently require a lengthy period to complete. During the specified delay, the remaining steps disappear from My Tasks of any responsible group. The steps then reappear upon completion of the specified delay.

When you use a step delay, Workday enforces step priority as usual. Example: A business process includes 3 steps: steps *a*, *b*, and *c*. If step *b* has a delay of 20 days, step *c* won't run for at least 20 days, the earliest time at which step *b* can be completed.

When you add a step delay to a step that's within a set of parallel steps, Workday delays the step but doesn't delay the other parallel steps. Workday doesn't move to the next step until all parallel steps are complete. Example: A business process has these steps:

- *a*
- *b1* has a step delay.
- *b2*
- *b3*
- *c*

Step *b1* delays but steps *b2* and *b3* continue with no delay. All *b* steps must complete before moving to step *c*.

Steps

1. Access the Edit Tenant Setup - Business Processes task.

2. Select the owner of the Business Process Resume Delayed Steps process from the User for Business Process Time Delay Background Processes prompt. Workday references this user in business process events as having completed tasks.
3. Select the environments in which the Business Process Resume Delayed Steps background process runs in your tenant from the Step Delay Schedule Restrict to Environments prompt. When you don't select an environment, this background process runs in all environments in your tenant.
4. Access the Edit Tenant Setup - System task.
5. As you complete the Business Process Date Calculation Time Zone section, consider:

Option	Description
Workday Default Time Zone Settings (PST)	Workday resumes all delayed steps in Pacific Standard Time (PST).
Tenant Default Time Zone Settings	Workday resumes all delayed steps based on the time zone in the Default Timezone prompt. Example: If you select Japan Standard Time (JST), Workday resumes all delayed steps in JST. When you don't select a value in the Default Timezone prompt, we use PST to calculate the step delay.
Event Related Time Zone	Workday resumes delayed steps based on the time zone in the following order. When the: a. Event is about a worker, we use the time zone of that worker. b. Event isn't about a worker (such as a supplier invoice) but a worker initiates the event, we use the initiator's time zone to calculate when the step delay trigger begins. When the initiating action is delegated, we use the time zone of the delegator and not the delegate's time zone. c. Event isn't about a worker and wasn't initiated by a worker, we use PST.

6. Access a business process definition.
7. Select Business Process > Maintain Step Delay from the related actions menu of the business process step.
8. (Optional) Enter the Time Zone. The default time zone is the user's current time zone.

   You can only select a time zone when you enable the Business Process Configuration Time Zone check box on the Edit Tenant Setup - System task.

   - When you enter the current date in the specified time zone, the changes take effect immediately.
   - When you enter a future date in the specified time zone, the changes take effect at midnight on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.
   - When you enter a past date in the specified time zone, the changes take effect at 11:59:59 PM on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.

9. Under Delay Is Based On, select Prior Step Completion Date or Process Initiation Date. You can also select an external Field, such as Effective Date.

   Date is a static value. Meaning, Workday sets the date when we generate the step delay. Step delay is calculated when the business process transaction reaches the step with the delay. Subsequent changes to the business process, such as correcting the effective date of the business process event, doesn't cause the delayed step to recalculate the delay. When the step delay calculates to a day that's in the past or the current date (today's date), the step delay doesn't occur.

   When you select the Recalculate Delay upon Correct check box, Workday recalculates the step delay when you correct the business process. Workday displays the newly calculated step delay date in the process history of the business process event. For business processes with subprocesses, Workday recalculates the step delay for all of the subprocesses in addition to the parent business process.
10. Specify the Additional Delay in the Calculated Date prompt.

    You can't add step delays for a period of time that is less than a day or a date. Because the step delay background process runs around midnight in the associated time zone you selected, Workday resumes delayed steps for periods of time that can be expressed in units of whole days only.

    For dates that are calculated in units of days, Workday uses the rule based calendars that you configure on the *business process definition*. Otherwise, Workday calculates the step delay based on consecutive days.
11. (Optional) Select the Recalculate Delay upon Correct check box.

Next Steps

To change or cancel the business process instance, force the completion of a step that's within its specified delay period.

1. Access the Reschedule Delayed Business Process Transactions task to select the business process instance.

   When you reschedule a step delay using the Reschedule Delayed Business Process Transactions task in a nonproduction tenant, a background job runs every hour to process the delay. Expect a delay of up to 1 hour. Example: At 5:05 PM, you use the task to reschedule a step delay. The job runs and the step comes off of the delay approximately 1 hour later at 6:05 PM.
2. Select the Business Process Type of the instance you want to reschedule, and a Start Date and End Date that contain the scheduled completion date of the delayed step.
3. In the Reschedule To Date prompt, select the date on which you want the delayed step to complete. This date honors the time zone settings you configured in your tenant.

   Example: You configure your tenant to use Event Related Time Zone. There are delayed steps on the *Hire* business process type for a worker in Japan and a worker in San Francisco.

   When you select 2021-12-15 as the date on which you want the delayed steps to complete:

   - The step for the worker based in Japan completes on 2021-12-15 at 12:00 AM JST.
   - The step for the worker based in San Francisco completes on 2021-12-15 at 12:00 AM PST.

Related Information

Concepts

Concept: Calculated Dates on page 1025

Tasks

Configure Rule-Based Business Processes on page 1014

Embed Related Worklets in Business Processes

Prerequisites

- Enable reports for related worklets.
- Security: Workday worklets display links to reports according to user permissions on the domains securing the reports.

Context

You can embed related worklets in your business process steps to deliver relevant, contextual information as you go through the business process steps. You can embed up to 5 worklets for a step.

Steps

1. Select Business Process > Maintain Related Worklets from the related actions menu of the business process definition.
2. Select the step you want to embed the worklet on and click Maintain Step Related Worklets.
3. Complete the task:

Option	Description
Embedded Worklets Icon or Label	You can enter a maximum of 24 characters for custom labels.

4. Click Add
5. Complete the Worklet section:

Option	Description
Name	Select the custom report you want to embed.
Security Group	(Optional) Remove security groups that have access to the worklet.
Worklet Prompts	When the worklet includes prompts, select the prompt values and related information.

Result

When a user reaches the configured step in the business process, the related worklets icon or label displays. The user can select the icon or label to open the interactive report in a popup window.

Next Steps

Test that the worklets display correctly in the business processes.

Related Information

Concepts

Concept: Related Worklets in Business Processes on page 1026

Tasks

Enable Reports for Related Worklets

Reference

The Next Level: Alerts and Embedded Intelligence

Create Integration (Step)

Prerequisites

Before you set up the *Integration* step, you must create the integration system that the *Integration* step will use.

Context

The *Integration* step launches an *Integration Process* event. The *Integration Process* event then launches an integration system that is associated with 1 or more *Integration Process Event* business processes. When Workday runs the *Integration* step, it selects and executes an associated *Integration Process* event as a subprocess according to these criteria:

- When one of the *Integration Process Event* business processes is associated with the same organization as the parent business process, Workday uses that *Integration Process* event.
- When no *Integration Process* event is specifically associated with the same organization as the parent business process, Workday applies the default *Integration Process* event.

Steps

1. Create or edit a business process.
2. When you add a step on the Edit Business Process Definition page, specify the step type in the Type Column as *Integration* and click OK.
   Workday displays an error indicating that the configuration isn't complete.
3. Switch to the View Business Process Definition page by clicking Done at the bottom of the page.
4. On the View Business Process Definition page, find the *Integration* step and click Configure Integration System or select Business Process > Configure Integration Step from the related actions menu.

   When you edit a business process definition with an effective date that's in the future, you can add an *Integration* step but you won't be able to configure the step.
5. At the Integration System prompt, select the integration system that you want to launch.
6. At the Run As User prompt, select the system user account that the integration should use.
7. Select the method that Workday should use to generate the request name.
   Workday displays the request name in the Process Monitor to represent this integration system.
8. In the Integration Criteria section, if required, enter the date range rules that Workday should follow when selecting data to include in the integration.
9. (Optional) Configure redirect on an *Integration* step.

Configure Consolidated Template Override

Prerequisites

Security: *Business Process Administration* and *Manage: Business Process Definitions* domains in the System functional area.

Context

You can configure the order in which business process types are consolidated within the *Change Job* business process consolidated template, based on the initiating action of the business process.

Steps

1. Run the View Business Process Template report.
2. Select Change Job from the Business Process Type prompt.
3. As a related action on the business process type, select Business Process > Configure Consolidated Template Override.

   This option is available only for business processes with templates.
4. Enter the Effective Date. The default effective date is the current date.

5. Enter the Time Zone. The default time zone is the user's current time zone.

   You can only enter a time zone if you selected the Business Process Configuration Time Zone option on the Edit Tenant Setup - System task.

   - If you enter the current date in the specified time zone, the changes take effect immediately. Users in other time zones see the changes immediately.
   - If you enter a future date in the specified time zone, the changes take effect at midnight on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.
   - If you enter a past date in the specified time zone, the changes take effect at 11:59:59 PM on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.
6. Select the Business Process Type from the prompt.
7. Add a new row beneath Business Process Consolidated Template Override.
8. Select an initiating action from the prompt in the Initiating Actions column.
9. Add a new Business Process Type for Orchestrated Task Item for the initiating action you selected. Repeat this step for each business process type that you want to consolidate with the *Change Job* business process.

Result

For any initiating action, you can configure whether the *Change Job* business process type is consolidated with the *Change Organization Assignments for Worker* business process type, the *Propose Compensation Change* business process type, both, or neither. However, you can't change the order of the *Change Job* business process type or remove it from the consolidated template.

Note: The default business process consolidated template is used for any initiating action that you don't override.

Example

You can initiate the *Change Job* business process by:

- Accessing the Change Job task.
- Accessing the Request Transfer task.
- Selecting Change Job as a related action from a worker, position, or supervisory organization.
- Selecting Change Location as a related action from a worker.

The default configuration of the *Change Job* business process consolidated template consolidates *Change Job* with *Change Organization Assignments for Worker* and *Propose Compensation Change*. If you initiate the *Change Job* business process by selecting Change Location as a related action from a worker, you can configure the *Change Job* consolidated business process template to only consolidate the *Change Job* business process type with the *Propose Compensation Change* business process type.

Related Information
Concepts
Concept: Business Process Templates on page 1024

Hide or Require Optional Fields

Prerequisites

Security: *Set Up: Configure Optional Fields* domain in the System functional area.

Context

To have more control over what users see in your tasks, you can set up optional fields in business processes as:

- Hidden for all users or security groups.
- Required for all users or security groups.
- Not enterable for all users or security groups.

Steps

1. Access the Configure Optional Fields task.
2. Select the task or process from the By Functional Area prompt.
3. As you complete the task, consider:

Option	Description
Field	Available options depend on the business process or task of the functional area that you select.
Criteria	For Security Group, select the groups that the Field is Hidden For or Required For. When a user is member of a security group that doesn't have a field configured as hidden, the field is visible. The field is visible even when Workday hides the field for other security groups that the user is a member of.
Enforce Required in Web Services	This functionality only applies if the functional area implements it. Select to enforce required fields on all web services within the functional area. Clearing this check box enables you to correct data without populating every field on the web service. Example: The *Correct Award* web service enables you to update information in Workday without populating every field. If you select this check box, and leave any required fields blank on the web service, you'll get an error.
Hidden For	Hides the Field from the users and security groups in this field.
Required For	Requires the Field for the users and security groups in this field.
Not Enterable For	Displays the Field for the users and security groups in this field. The field isn't editable. If the task or business process doesn't support view-only fields, Workday displays this grid column but doesn't display a select field.

Related Information

Concepts

Concept: Business Process Segmented Security on page 1027

Tasks

Maintain Localization Settings

Launch Orchestrations on Business Process Status Changes

Prerequisites

- On the Workday Developer Site, create an Extend app.
- In your Workday tenant, create a business process.

Context

You can configure a business process to automatically launch an orchestration when a user takes one of these actions:

- Cancel
- Rescind
- Correct
- Deny

Doing so can help ensure data consistency between Workday and external systems. Example: a new hire business process performs a number of steps in Workday, then launches an orchestration to integrate with an external system that handles access provisioning. If the hire is rescinded, the business process launches a different orchestration that integrates with the external system to revoke the provisioned access.

Orchestrations used in this way must be based on the Workday Business Process template.

Steps

1. On the Workday Developer Site, add an orchestration based on the Workday Business Process template to your Extend app.

   Note: If your orchestration makes API calls, it must use WCPISU authentication.
2. On the orchestration's Business Process Trigger step, configure input parameters to define the values the orchestration can receive from the business process.
3. Add the steps that you want the orchestration to perform when the business process that calls it is canceled, rescinded, corrected, or denied.
4. Deploy the application containing the orchestration to your tenant.
5. In Workday, access the Edit Tenant Setup - Business Processes task. In the User to Perform Orchestration Launches field, specify an individual with the appropriate permissions to access fields and perform actions required by the orchestration.
6. In Workday, from the related actions menu of the business process, select Business Process > Configure Orchestrations.
7. In the Configure Orchestrations task, click Add to begin pairing the business process status change with the orchestration.
8. In the Action field, select the business process status change that launches the orchestration, *Cancel*, *Rescind*, *Correct*, or *Deny*.
9. In the Orchestration field, select *Create Orchestration Launch Configuration*.

   Note: Workday doesn't create orchestration launch configurations automatically. Your orchestration might have successfully deployed to the tenant, but you can't select it here until you create a launch configuration.
10. In the Create Orchestration Launch Configuration task, provide a unique Name for the configuration and select the Orchestration that you deployed.
11. In the Configurable Parameters section, Workday displays the input parameters you configured on the orchestration's Business Process Trigger step. Configure the values that you would like the business process to pass to the orchestration.

12. Back in the Configure Orchestrations task, you can now select the orchestration launch configuration you created.

    You can additional pairings of business process status change and orchestration launch to cover other actions.
13. (Optional) To view the status of an orchestration associated business process, use the Find Events task. Workday displays the orchestration's status on the Orchestrations tab.

    Note: A business process-triggered orchestration is typically launched by the Workday scheduler within 15 minutes. There might be a longer delay in Mass Cancel or Mass Rescind scenarios.

    The time taken for the orchestration status to change from *In Progress* to *Completed* is solely dependent on the orchestration's processing.
14. (Optional) When the orchestration's status changes from *Queued for Launch* to *In Progress*, a Relaunch option becomes available on the Event Canceled, Event Rescinded, Event Corrected, or Event Denied page. Click it to access the Relaunch Orchestration task, where you can adjust launch parameters, if necessary, before relaunch.

    Note:

    The action page displays *Completed* status for the orchestration only if the initiating user has View permission for the event.

Related Information
Concepts
Concept: Workday Extend

Example: Create Business Process Condition Rules

This example shows how to create business process condition rules.

Context

Your company wants to better understand why some new hire employees do not come to their first day of work. In order to help identify recurring trends, you plan to configure the *No Show* business process so that it requires HR Partners to add a comment with any supplementary context when reviewing each *No Show*.

Prerequisites

Security: These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*

Steps

1. Access the No Show business process definition.
2. From the related actions menu of step *b) Action*, select Business Process > Create Condition Rule > See in New Tab.
3. In the Description text box, add *Require context for no shows*.
4. Enter these rule conditions:

Prompt	Select
*Source External Field or Condition Rule	Comments
Relational Operator	is empty
Comparison Type	Value specified in this filter

5. Click OK.

6. Return to the No Show business process definition.
7. From the related actions menu of step *b) Action*, select Business Process > Maintain Step Conditions.
8. Select the current date as the Effective Date in order for the condition rule to take effect immediately. Click OK.

Note: The effective time zone defaults to your current time zone. See Setup Considerations: Time Zones on page 341 for more details.

9. Under Validation Conditions, click Add Row.
10. From the Rule prompt, select the Require context for no shows rule that you created.
11. Click OK.

Result

HR Partners must add a comment in order to review and complete step *b)* of the *No Show* business process .

Next Steps

Related Information

Concepts

Concept: Step Conditions on page 960

Setup Considerations: Business Processes on page 943

Setup Considerations: Time Zones on page 341

Tasks

Steps: Enable Attachments on an Individual Business Process on page 1051

Concept: Business Process Templates

There are 2 types of business process templates:

- Workday delivered templates, which you access through the View Business Process Template report.
- Templates that customers configure. From the related actions menu of the business process, select Business Process > Configure Consolidated Template. This option is available only for business processes with templates. You can consolidate tasks from multiple business process templates to streamline your business processes.

Business process templates enable you to configure help text and instructional text on the component tasks of an overall guided task. Example: The *Onboarding* business process or the Change Job task. To view a Workday delivered business process template, access the View Business Process Template report and select a business process from the Business Process Type prompt.

For each business process template, Workday determines:

- If you can attach documents as a component task of the business process.
- The order in which tasks present to users.
- The tasks included in the template.

On the View Business Process Template report, Workday enables you to configure:

- Help text for section groups on a task.
- Instructional text for the summary page of a task.

On the Instructional Text tab, you can click Configure Instructional Text to add a title (Example: Contact Information) and summary text to the top of the Summary page of the overall task. You can also configure the titles and help text that display on the Welcome page and Welcome Back page. The Instructional Text tab is only visible when the Supports Help Text in Summary Page and Supports Help Text in Welcome and Welcome Back page fields are set to Yes.

On the Section Groups tab, you can click Configure Help Text to add help text for consolidated tasks (section groups) and component tasks (sections) in the business process template.

Workday only displays section group help text that you configure on guided view tasks, or tasks that guide you step-by-step as you complete each component. Workday doesn't display section group help text on summary view tasks, which contain all task components on a single page.

You can optionally use the Translate Business Object report to translate help text into any target language enabled in your tenant. Select the *Workflow Help Text* option from the Translatable Business Object prompt to translate help text on:

- Section groups.
- The Summary page.
- The Welcome page.
- The Welcome Back page.

You can't translate titles on the Summary, Welcome, or Welcome Back pages.

For business processes with defined templates, you can consolidate tasks at the initiation of a business process.

You can only consolidate tasks that are component tasks of guided tasks such as Change Job. Since component tasks of a consolidated template all start together, you can't add validation rules to the *Initiation* step of component tasks that run as subprocesses. Add validation rules to the *Initiation* step of the business process. Example: Add validation rules to the *Initiation* step of Change Job.

When a consolidated template is delegated to another worker, the delegate is able to access all of the component tasks in the consolidated template that the delegator had access to. To delegate the initiating action of a consolidated template to another worker, you must select the component tasks in the For Business Process prompt on the Request Delegation Change task.

Related Information
Tasks
Translate Business Object on page 364

Concept: Calculated Dates

Calculated dates are used to specify dates you want to use as a constant in your business processes.

You can use the Maintain Calculated Dates task to enter the name of a calculated date that you want to display in the Due Date column of a business process step. In the Initial Date/Initial Calculated Date column, you can either select:

Initial Date	Enter a specific date if you want the calculated date to calculate from that date.
Initial Calculated Date	Enter the name of another calculated date. Use if you want this calculated date interval to be added to another calculated date interval.
None of the Above	Use if you want the calculated date to be calculated from the start date for the business process or step.

Workday recommends you set the Pre Increment Amount and Pre Increment Interval fields to specify the amount of time to add to the starting date. Example: If you're creating a calculated date called 1 Fortnight, set the Pre Increment Amount to 2 and the Pre Increment Interval to weeks.

Note: Use either Set to Start of Interval or Set to End of Interval, but not both. These set the calculated date to the start or end of the specified interval.

You can use the Post Increment Amount and Post Increment Interval fields to specify the amount of time to add to the day of the Start or End of an interval.

If you're creating a calculated date called 3 days after the beginning of next month, set the fields as follows:

Column	Value	Explanation
Pre Increment Amount	1	Go forward one...
Pre Increment Interval	Month	Month from now.
Set to Start of Interval	Month	Go to the start of the resulting month.
Set to End of Interval		(You can't use both Start and End.)
Post Increment Amount	3	Go forward another three...
Post Increment Interval	Day	Days from the Start of Interval day.

Related Information
Tasks

Maintain Step Delay on page 1015

Concept: Related Worklets in Business Processes

By embedding related worklets in your business process steps, you can deliver relevant, contextual information as your users perform actions in the processes. More contextual information can lead to more informed decisions and fewer processing mistakes.

Example: When employees request compensation changes, you can embed analytics to help compare employee salaries at your company.

Users can access embedded analytics from the View Related Information window on the upper right corner of the task. The embedded analytics display on a floating panel, which users can manage by:

- Dragging the panel to a new position.
- Expanding and collapsing the panel.

You can configure up to 5 worklets per business process step.

To view all business processes and related steps that you've enabled for embedded analytics, access the Business Process Steps Enabled for Worklets report.

Related Information
Tasks

Embed Related Worklets in Business Processes on page 1018

Enable Reports for Related Worklets

Reference

The Next Level: Alerts and Embedded Intelligence

Concept: Rule-Based Business Process Definitions

Workday enables business process administrators to create *business process definitions* that:

- Are based on condition rules.
- Aren't constrained solely by organizations.

Workday selects the appropriate business process definition based on the configuration set by the business process administrator. Use rule-based business process definitions to configure business process definitions to:

- Follow a different path depending upon the role of the initiator.
- Support different process flows for different functional situations.

Examples:

- If the user is an HR administrator, configure the business process to skip the *Approval* step and go directly to the completion step of the business process.
- If a worker is located in Europe, configure the business process event to be approved by personnel in the locale that supports the target worker.

Rule-based business process definitions enable business process administrators to:

- Easily update a specific business process definition without affecting any of the other definitions for that business process.
- Optimize business process definitions to meet specific business requirements.

When you initiate a business process but you save it for later instead of submitting it, the business process definition that Workday uses is set at the time you click the Save for Later button. Also, Workday uses the information that's available upon saving the event. When there are fields tied to conditions that are on a rule-based business process definition and the fields don't contain data that satisfy any of the conditions when you save the event for later, Workday bypasses the rule-based business process definitions and uses the default business process definition.

As a related action from a business process definition, select Business Process > Copy or Link Business Process Definition. Select the Rule Based Workflow Definition Name option, and enter a name for the rule-based business process definition. This name must be unique.

Workday displays this name in parentheses in the business process definition name. When you view the business process definition, Workday indicates that it's a rule-based definition.

To inactivate a rule-based business process definition, select Business Process > Inactivate Business Process Definition as a related action from the rule-based business process definition. You can't inactivate a rule-based business process definition that is associated with a rule-based business process configuration.

You can rename a rule-based business process definition when you're editing the definition. However, the name of a rule-based business process definition must be unique for the business process type.

Concept: Business Process Segmented Security

You can use the Create Business Process Type Security Segment task to configure segment-based security segments for business process definitions. Business process administrators can access all business processes in the tenant. The task enables you to control which business processes a business process administrator can access.

Example: Adam and Mike are business process administrators. You want Adam to have access to only staffing-related business processes and Mike to have access to only finance-related business processes. You use the task to grant access by segment-based security. Adam can now access staffing-related business processes but not finance-related business processes. Mike can access finance-related business processes but not staffing-related business processes. Use functional areas and specific business process types for this purpose.

You need to select at least 1 value in either the Business Process Type prompt or the Functional Area prompt. Based on your selection in 1 or both prompts, Workday grants access to business processes. When you configure both prompts, they aren't dependent upon each other.

You can use the Create Business Process Type Security Segment task to create security segments. You also need to add the segments to a segment-based security group. You can use Object Transporter to shift segments from tenant to tenant.

Access to these business process components can't be segmented:

- Rules

- To Dos
- Checklists
- Calculated dates

To use a business process type security segment, you must first:

- Associate it with a segment base.
- Secure the group to the *Manage: Business Process Definitions* domain.

The *Manage: Business Process Definitions* domain only includes tasks related to defining business processes. Workday manages access to in-process events using the security policy of individual business processes.

Segment-based security groups can include any type of security group, including role-based security groups. When you use a role-based security group, only maintain business processes affiliated with the organizations they have an assigned role for.

Workday recommends that you grant unconstrained access to business process administrators on the Business Process Definitions report data source (RDS) so they can build custom reports using this RDS.

Related Information

Concepts

Concept: Object Transporter on page 776

Concept: Security Groups

Tasks

Create Segment-Based Security Groups

Manage Business Processes

Setup Considerations: Auto-Manage Business Processes for Worker

You can use this topic to help make decisions when planning your configuration and use of the *Auto-Manage Business Processes* service step. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

When you enable the *Auto-Manage Business Processes* service step, you can automate in-progress events and My Tasks items when a worker's employment status changes. When you configure rules, Workday automatically takes action on:

- Business processes that are about the worker, which still have remaining steps. You can cancel the business process or advance the business process to the end. Example: Performance review.
- Business process steps that await the worker's action. You can reassign the steps to someone else or remove the person as an assignee if there are other assignees. Example: Approving expense reports for a direct report.

When you configure this service step on a business process definition, Workday automatically takes action on business processes based on the rules you define for the step.

Business Benefits

When you use the *Auto-Manage Business Processes* service step, it:

- Improves efficiency.
- Reduces manual effort and maintenance of external systems.
- Reduces organizational costs.

By using the *Auto-Manage Business Processes* service step, you don't have to use the manual, time-consuming Manage Business Processes for Worker task. When you use the Manage Business Processes for Worker task, there might be situations where you don't know how to handle business process events about a worker or what to do with My Tasks items that are awaiting a worker. Also, it might not be manageable when you have a large number of events to update.

Use Cases

- Cancel pending time off requests for a worker who is going on extended leave.
- Reassign My Tasks items for a manager who is changing to a job in a different organization.
- Update worker-related events or My Tasks items to reflect employee status changes and continue the workflow.
- Automatically take action on business processes and My Tasks items for workers who are leaving their current jobs.
- Cancel or reassign a terminated employee's My Tasks items that are in Save for Later status.

Questions to Consider

Questions	Considerations
Do you need to update worker-related business process events when workers leave your organization?	You can configure the *Auto-Manage Business Processes* service step to cancel or advance the step to completion. Workday automatically takes action on business processes based on the rules you define for the step.
Do you need to manage incomplete business process steps that require worker action when a worker's employment status changes?	You can configure the *Auto-Manage Business Processes* service step to reassign it to someone else or remove the worker as the assignee. Workday automatically takes action on business processes based on the rules you define for the step.
Do you have terminated employees that have Save for Later My Tasks items?	You can configure the *Auto-Manage Business Processes* service step to reassign or cancel the tasks. When you terminate an employee, the employee can still access their My Tasks items that are in Save for Later status. When you configure the service step, Workday automatically takes action on the Save for Later tasks.

Recommendations

Add the Manage Business Processes for Worker as an *Action* step after the *Auto-Manage Business Processes* service step to ensure that all business processes are processed.

Limit the number of business processes you initiate with the *Auto-Manage Business Processes* service step for optimal performance. When you consider how many business processes to initiate with the service step, Workday splits the processing into smaller batches. This is helpful when:

- You have more than 200,000 events to advance or cancel.
- You want to reassign or remove the assignee for more than 200,000 business process steps or My Tasks items.

The suggested threshold is to process 200,000 events or My Tasks items in 1 batch. Your tenant won't come down and processes won't become stuck when business processes with the *Auto-Manage Business Processes* configuration aren't initiated in smaller batches. However, it will take a while for processing to complete.

Requirements

Select a user from the User to Perform Automated Business Process Actions prompt on the Edit Tenant Setup - Business Processes task. This is the user that the service step uses to perform automated actions. When you configure the User to Perform Automated Business Process Actions prompt, you can't remove the user later. However, you can select another user. Select a user in your organization who is unlikely to change.

Limitations

You can only specify up to 50 automation rules in each grid on the Configure Event Service task.

The *Auto-Manage Business Processes* service step runs a scheduled job in the background every 15 minutes. There might be a 5-30 minute delay before the *Auto-Manage Business Processes* service step completes processing and moves to the next step. When there's a large amount of data to process, the delay can be more than 1 hour.

The *Auto-Manage Business Processes* service step configuration isn't effective dated. When you change the configuration, the changes update the next time the process runs.

For business process steps that are assigned to the person, you can't use the Reassign to Security Groups action on a:

- Shared participation step.
- Adobe Integration step. To reassign an Adobe Integration step, use the Manage Business Processes for Worker task or the Reassign action from the gear icon in the My Tasks.

When a step is awaiting a delegate and you configure the *Auto-Manage Business Processes* service step with the:

- Reassign to Security Groups action, you can't reassign the step.
- Remove Person as Assignee action, you can't remove the delegate from the step even when the step is awaiting multiple people.

You can't configure the *Auto-Manage Business Processes* service step in parallel with another step.

On some Business Processes such as Termination and Change Job, the Reassign and Remove Person as Assignee Auto-Manage Business Processes service step actions won't work if the step meets the following conditions:

- The step configuration references a security group (using Originally Routed To in the Business Process Steps Assigned to the Person section.
- It's placed after the *Completion* step.
- It's executed after the event effective date, such as the termination date or job change date.

We recommend that you add the Manage Business Processes for Worker task as an *Action* step after the *Auto-Manage Business Processes* step to ensure that it processes all operations. If you need to place the *Auto-Manage Business Processes* step after the *Completion* step of the business process, it must be executed before the event effective date, such as termination date or job change date.

Tenant Setup

Configure the User to Perform Automated Business Process Actions prompt on the Edit Tenant Setup - Business Processes task.

Security

These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*
- *Set Up: Tenant Setup - BP and Notifications*

Business Processes

You can add *Auto-Manage Business Processes* as a service step multiple times on these business processes:

- *Change Job*
- *End Contingent Worker Contract*
- *Request Leave of Absence*
- *Termination*

Integrations

You can use these web services to migrate *Auto-Manage Business Processes* service step configurations from 1 tenant to another:

- *Get Auto-Manage Business Processes Service Configuration*
- *Put Auto-Manage Business Processes Service Configuration*

Connections and Touchpoints

The *Auto-Manage Business Processes* service step interacts with Staffing.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Concepts

Concept: Auto-Manage Business Processes for a Worker on page 1063

Concept: Manage a Worker's My Tasks Items on page 1064

Tasks

Steps: Set Up Auto-Manage Business Processes Service Step on page 1049

Reference

The Next Level: Auto Manage Business Processes for Worker

Examples

Example: Set Up Auto-Manage Business Processes Service Step on page 1066

Setup Considerations: Mass Operations on Business Processes

You can use this topic to help make decisions when planning your configuration and use of Mass Operations Management functionality. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

The Mass Operation Management (MOM) task enables members of segment-based security groups to easily perform high-volume transactions on business processes, including:

- Advance
- Cancel
- Escalate
- Reassign

You can run the operation now or at a scheduled time such as once in the future, daily, weekly, or monthly. The task enables you to manage high-volume transactions by selecting an operation to run on an input report.

Business Benefits

Using the MOM task decreases manual efforts related to managing your business processes. The task allows these operation types:

- *Advance Business Processes*
- *Cancel Business Processes*
- *Cancel To Do*
- *Escalate Business Processes*
- *Reassign Business Processes*
- *Rescind Business Processes*

Use Cases

You can use Mass Operations Management to:

- Cancel in-progress events automatically. Before the events are canceled, you want to be notified with a list of events being canceled as well as the option to continue or terminate the process.
- Automatically reassign a business process step that's awaiting action such as approval for a PTO request. The Reassign mass operation type is designed to help ease the burden of manually reassigning steps from 1 user or user group to another.
- Manually advance onboarding or hire steps in bulk.
- Shorten the lead time for approving job requisitions by escalating the job requisition approval step to the next-level manager.
- Skip *To Do* steps awaiting action or saved for later in bulk such as after the *Completion* step of an onboarding event.

Questions to Consider

Questions	Considerations
How do you reassign business process steps in bulk rather than manually reassigning them from 1 person to another?	You can use the Reassign Business Process Step mass operation type when you configure a segment-based security group on the *Mass Operations Management* domain. If you don't enable the security, your users won't have access to this mass operation type. Use the Reassignable Step report field in a custom report as a Filter and input the report in the MOM task. You can use the report field to report on business process steps that can be reassigned, and they are either awaiting a person

Questions	Considerations
	to take action or the step is unassigned. Note that they can have any of these statuses: • *Awaiting Action* • *Automatic Initiate* • *Manual Send Back* • *Saved for Later* • *Sent Back* To filter further, you can also use the Awaiting Persons report field in your custom report. You can reassign business process steps to a person with a non-worker role. Example: A student. Note that you won't be able to reassign business process steps to a: • System user that doesn't have a role. Example: An Implementer or Service Center Representative. • Person that doesn't have an active Workday account. Example: A candidate.
How do you mass advance business processes?	Before you use the MOM task to advance business processes en mass, consider the business processes you want to advance. You can't send back business processes en mass using MOM. However, you can send back business processes en mass using the *Send Back Business Process* Enterprise Interface Builder (EIB) if you have permission: To run EIBs. • On the business process security policy to perform this action on the event for the business process type. You should also consider parallel steps when you use the MOM task to advance business processes. When you advance a step, this triggers the advancement of any parallel steps on the business process. Example: A termination event has 2 parallel steps: • Step b: Employee exit survey • Step b: HR exit survey If you advance the employee exit survey step using MOM, the parallel HR exit survey step also advances. Note: Automatic advancement isn't triggered if a parallel step is marked as Do Not Advance on the business process definition.
How do you mass cancel business processes?	The Mass Cancel Business Process task is limited such that you can cancel certain business processes by type or by an external source and

Questions	Considerations
	time range. When you use the MOM task, it allows you to schedule cancellations to occur on a regular basis, be notified of the upcoming cancellation, and include a required review step to prevent accidental cancellations by allowing certain users to cancel the process. To avoid performance issues, only use the Mass Cancel Business Processes task when canceling fewer than 25 events. For higher volumes, use the MOM task instead. Workday also recommends that you cancel events in smaller chunks by using the business process type and date range filters.
How do you handle canceling or processing transactions that are currently in Workday?	Consider automating some of this using the MOM task. You must be able to identify those business processes that you want to cancel, advance, or reassign with a custom report.
How do you mass rescind business processes?	The Rescind Business Processes mass operation type gives you the ability to schedule mass rescind events that you previously manually rescinded using existing solutions like the Mass Rescind Business Processes task. You can schedule mass rescind events to occur on a regular basis, get notified of upcoming rescinds, and include a required *Review* step to prevent mistakes by allowing only specified users to rescind.

Recommendations

Review your business processes to make sure they can be advanced, canceled, and reassigned.

When you run the MOM task and if the report returns more instances than the predefined limit for that mass operation type, Workday returns an error and doesn't perform the operation on any of the instances in the input report. Workday recommends that you verify the instance limit of the mass operation type you are using by checking its description. Then, break your report into smaller reports and configure multiple MOM processes so that each report returns less than the instance limit for the mass operation type.

When you configure the Reassign Business Process Step mass operation to mass reassign steps that are unassigned in your tenant:

- Use the Reassignable Step report field in a custom report. To filter further, you can also use the Awaiting Persons report field in the custom report.
- Select the All Current Assignees or No Assignees prompt.

Requirements

To initiate a mass operation, you need to confirm that a segment-based security group can access the mass operation type segment. Grant the segment-based security group View and Modify access to the *Mass Operation Management* domain security policy. You can access the View Mass Operation Types report to view all available mass operation types.

Create a custom report that returns the business process instances on which to perform the mass operation. You can use the Supports Operation Type report field to determine if a report data source supports a mass operation type for the task.

In the custom report, you must add a filter with a True condition for the mass operation type:

Mass Operation Type	Required Input Report Filter	Additional Information
Advance Business Process	Manually Advanceable	
Cancel Business Process	Cancelable	
Cancel To Do	Cancelable To Do	Workday skips unsubmitted steps with statuses of: • *Awaiting Action* • *Saved for Later*
Escalate Business Process Step	Step Can Escalate	The business process step must be awaiting action in 1 of these steps: • *Action* • *Approval* • *Approval Chain* • *Consolidated Approval* • *Consolidated Approval Chain*
Reassign Business Process Step	Reassignable Step	Workday reassigns all business process steps that the report returns. This can include unassigned steps and steps with statuses of: • *Awaiting Action* • *Automatic Initiate* • *Manual Send Back* • *Saved for Later* • *Sent Back*

Limitations

Workday enforces a limit of 50,000 instances on most mass operation types, although there are some exceptions. For example, *Cancel Business Process* has a limit of 200,000 instances. Some mass operations types might allow a higher instance limit. Workday sets these limits to prevent large MOM background processes from degrading tenant performance. When you run the MOM task and if the report returns more instances than the predefined limit for that mass operation type, Workday returns an error and doesn't perform the operation on any of the instances in the input report.

When you use the Advance Business Process mass operation type but you decide you want to send all the business processes back, you must manually send each one back or run the *Send Back Business Process* EIB if you have the security permissions. Once you send back business processes en mass, you won't be able to undo your action. You can manually send back a business process only if it's enabled on the business process security policy.

The Reassign Business Process Step mass operation type won't reassign *Initiation* steps when you select the All New Role Assignees option in the To section.

Business process administrators should create or edit a segment-based security group and grant segment-based security group access to the appropriate business process domains or business process security policies. MOM will only be able to act on instances that the person who configured the MOM operation has permissions to view.

Security

Understand segment-based security groups and segmented security. Business process administrators should create or edit a segment-based security group and grant segment-based security group access to the:

- *Mass Operation Management* domain in the System functional area.
- Appropriate business process domains or business process security policies. MOM will only be able to act on instances that the person who configured the MOM operation has permissions to view.

When you use the Reassign Business Process Step mass operation type, Workday reassigns steps only to security groups that are on the business process security policy for the step.

Business Processes

To use *Cancel Business Process* and *Advance Business Process* mass operations types on business processes, you need to specify the security groups on the business process security policy.

You can use the Business Process Configuration Options report to view what business processes can be advanced and canceled.

Reporting

Reports	Considerations
Business Process Configuration Options	You can use this report to determine which business processes you can advance and cancel.
Mass Operation Reviews	You can use this report to view the status and details of operations for a specific time frame. You can suppress notifications when using the MOM task.
Scheduled Future Processes	You can use this report to edit scheduled processes including scheduled mass operation processes. On this report, you can only change the start and end dates of the process and basic configuration settings.
View Mass Operation Types	You can use this report to view the available mass operation types. Access this report to view the Mass Operation Security Segment for each type and the security groups it’s accessible to.

Workday recommends that you use these report data sources:

- Business Process Event Steps: For *Escalate Business Process Step* and *Reassign Business Process Step* mass operation types.
- Business Process Transactions: For *Advance Business Process* and *Cancel Business Process* mass operation types.
- Business Process Transactions (Indexed): For *Advance Business Process* and *Cancel Business Process* mass operation types. You can use this report data source when configuring the mass operation only if you're on the domain security policy for the *Business Process Administration* domain. If this is the case, Workday recommends that you use this report data source instead of the Business Process Transactions report data source to improve performance of the report.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Tasks

Set Up Mass Operations on page 1037

Update Scheduled Mass Operation Processes on page 1042

Manage Scheduled Future Processes on page 736

Reference

The Next Level: Managing Business Processes with Mass Operation Management

Create a Segment-Based Security Group for Mass Operations

Prerequisites

Security: *Security Configuration* domain in the System functional area.

Context

Create or edit a segment-based security group to restrict access to mass operation types on business processes.

Steps

1. Access the Create Security Group task or the Edit Security Group task.
2. Create or edit the segment-based security group:
    - If creating the security group, for Type of Tenanted Security Group, select *Segment-Based Security Group*, then specify the Name. Example: *Mass Advance Segment-Based Group*.
    - If editing an existing segment-based security group, select the Security Group.
3. In the Group Criteria section, from the Security Groups prompt, select the security group. Example: *Business Process Administrator*.
4. In the Access Rights section, from the Access to Segments prompt, select the *Mass Operation Type Segment* for the mass operation type. Example: *Mass Advance*.

    All Mass Operation Type segments are Workday-owned.

Next Steps

Grant the segment-based security group View and Modify permissions to the *Mass Operation Management* domain in the System functional area.

Related Information

Tasks

Set Up Mass Operations on page 1037

Set Up Mass Operations

Prerequisites

- Create a custom report that retrieves the business process instances on which to perform the mass operation. You can use the Supports Operation Type report field to determine if a report data source supports a mass operation type for the task.
- Create a segment-based security group with access rights for the required mass operation.
- Security: *Mass Operation Management* domain in the System functional area.

Context

You can use the Mass Operation Management (MOM) task to enable members of segment-based security groups to perform mass operations on business processes.

Steps

1. Access the Mass Operation Management task.

   Your selection determines options to display on the next page.
2. As you complete the task, consider:

Option	Description
Mass Operation Type	When you select: • *Advance Business Process*: Configure a filter with an And condition that sets the Manually Advanceable report field to *True* on your input report. When you enable the Enable Advancing Unassigned Tasks check box on the Edit Tenant Setup - Business Processes task, you can advance an unassigned step within a business process. • *Cancel Business Process*: Configure a filter with an And condition that sets the Cancelable report field to *True* on your input report. • *Cancel To Do*: Configure a filter that sets the Cancelable To Do report field to *True* on your input report. Workday skips all *To Do* steps in *Awaiting Action* or *Saved for Later* status. To filter out by *Saved for Later* status, use the Event Record Action report field in your input report. • *Distribute Journeys*: Workday distributes up to 50,000 journeys. The Exclude recipients who have a completed or retired journey from this category option enables you to prevent the journey builder from sending journeys to recipients who have journeys in *Completed* or *Retired* status. • *Edit Journey Status*: Cancel or retire up to 50,000 new or in-progress journeys, and you can rescind completed, retired, in-progress, and not started journeys. • *Escalate Business Process Step*: Configure a filter with an And condition that sets the Step Can Escalate report field to *True* on your input report. Workday forwards steps only to security groups that include the manager role. When you use this mass operation type, you can only escalate steps to users who have access to the business process security policy, or you must select Unrestricted Escalation on the business process security policy. When a step recipient has multiple managers, Workday escalates steps up the management chain of the event target. Workday stops

Option	Description

	escalation when you reassign a step to a user not in the management chain. You must have access to the Reassign business process security policy to escalate business process steps.
	
	Workday uses advanced routing during escalation. Example: Select Exclude Initiator on the Maintain Advanced Routing task for a step, and HR Partner as an alternate security group. If a step is escalated to an initiator, Workday routes the step to the HR Partner.
	• *Reassign Business Process Step*: Workday reassigns My Tasks tasks to other users when there's 1 or more users or when there isn't a current user assigned. Configure a filter that sets the Reassignable Step report field to *True* on your input report. Workday attempts to reassign all business process steps that the report returns including unassigned steps and steps with statuses such as: *Awaiting Action*, *Automatic Initiate*, *Manual Send Back*, *Saved for Later*, and *Sent Back*. To filter out by assigned or unassigned status, use the Awaiting Persons report field in your input report.
	
	You can reassign business process steps to a person with a non-worker role. Example: A student. Note that you won't be able to reassign business process steps to a:
	  • System user that doesn't have a role. Example: An Implementer or Service Center Representative.
	  • Person that doesn't have an active Workday account. Example: A candidate.
	
	In the To section of the mass operation type, when you select the:
	  • Person prompt: Workday displays persons with nonworker roles in the prompt.
	  • Security Group prompt: Workday reassigns steps to non-worker roles that are within the selected security groups.
	• *Rescind Business Process*: Rescind up to 200,000 completed business processes. This operation also enables you to suppress notifications during

Option	Description
	processing. Configure a filter that sets the Rescindable report field to *True* on your input report. To rescind business processes using this mass operation type, they must include a *Review* step because you can't undo the operation. Note: When you rescind a completed business process, it reverses all progress and rescinds any other business processes that it calls as actions. All data reverts to its original state before the business process initiation. As a result, you may need to review custom data in some cases, such as *Edit Additional Data* events. For more information, see Concept: Edit Additional Data Step section. • *Redirect Inbox Items:* Schedule any of the allowed Redirect actions on integration failures; Move to Next Step, Terminate Business Process, or Rerun Integration. This functionality also impacts the *Review Documents* step type. Note: You can't automate the Send Back action using this mass operation type. You also must configure a filter with an AND condition that sets the Redirectable by Processing User report field to *True* on your input report.
Input Report	Select your custom report. Workday displays only simple or advanced custom reports using appropriate report data sources in the Input Report prompt. Workday recommends that you use these report data sources: • Business Process Event Steps: For *Escalate Business Process Step*, *Reassign Business Process Step* and *Cancel To Do* mass operation types. • Business Process Transactions: For *Advance Business Process* and *Cancel Business Process* mass operation types. • Business Process Transactions (Indexed): For *Advance Business Process* and *Cancel Business Process* mass operation types. You can use this report data source when configuring the mass operation only if you're on the domain security policy for the *Business Process Administration* domain. If this is the case,

Option	Description
	Workday recommends that you use this report data source instead of the Business Process Transactions report data source to improve performance of the report. When creating a custom report, clear the Optimized for Performance check box to use input report filters for MOM.
Run Frequency	Schedule the process to run at times of low usage.

3. As you complete the page, consider:

Option	Description
Suppress Notifications	When you suppress notifications and advance a business process to: • The next step: Workday doesn't send system and custom notifications for the next step of the parent business process or the first step of any subprocess initiated by that step. • Completion: Workday doesn't send system and custom notifications for the current step, subsequent steps, or subprocesses that are within the business process. • The final step: Workday doesn't send system and custom notifications upon completion of that step or the business process.
Send to Completion	The event advances to the end of the business process.
Delay and Default Review Action	Set these Review Notification Settings: • Delay: Select a period Workday waits for user review before processing or aborting the mass action by default. • Default Review Action: Select whether Workday aborts or continues to process the mass action if a reviewer doesn't respond before the delay period elapses.

Result

Workday enables a mass operation that runs when needed or as a scheduled background process. The Mass Operation Management task limits the number of actions that Workday performs in a single execution. The base of this limitation is the number of instances the input report generates. The limit is different for each mass operation type. Example: When you select an input report for an *Advance Business Process* operation that returns more than 50,000 instances, you'll get a notification that the Mass Operation Management background process completed with errors and didn't process any data.

You can use the Scheduled Future Processes report to edit scheduled processes including scheduled mass operation processes. On this report, you can only change the start and end dates of the process and basic configuration settings.

When using the Mass Operation Management Runs custom report to view the status of MOM background jobs, or when viewing the Results section of a particular background process, you might not be able to drill down on the Report Output, Data Processed, or Data Not Processed values. This is because the results data of background jobs is not retained indefinitely. These read-only results are retrieved from the MOM run when the instances themselves are not available on the background process. When the background process runs and purges MOM data, Workday returns saved data only.

Related Information

Concepts

Setup Considerations: Mass Operations on Business Processes on page 1031

Tasks

Create a Segment-Based Security Group for Mass Operations on page 1037

Create Report Performance Logs

Edit Domain Security Policies

Manage Scheduled Future Processes on page 736

Reference

The Next Level: Managing Business Processes with Mass Operation Management

Update Scheduled Mass Operation Processes

Prerequisites

- Schedule a mass operation with the Mass Operation Management task.
- Security: *Scheduled Process Management* domain in the Tenant Non-Configurable functional area.

Context

You can change scheduled mass operation processes, such as the *Advance Business Process* mass operation.

You can edit basic settings, such as:

- Dates that the process will begin and end.
- Whether or not to include a review step.

You can't edit:

- The input report that the process uses.
- The frequency that the process runs.
- Main configuration data. If you want to change the configuration, you need to create a new scheduled mass operation process.

Steps

1. Access the Scheduled Future Processes report.
2. From the Process prompt, select Mass Operation Management.

   All scheduled processes display.
3. From the related actions menu of the specific process, select Scheduled Future Processes > Edit.
4. Edit the configuration settings.

Related Information

Tasks

Manage Scheduled Future Processes on page 736

Reference

The Next Level: Managing Business Processes with Mass Operation Management

Maintain Advanced Routing

Prerequisites

Security: These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*

Context

You can define routing restrictions, alternate routings, and organization role-based routing for certain business process step types. You can't reroute *Initiation* and *Checklist* business process steps.

Routing restrictions enable you to configure business process steps so that Workday excludes selected individuals from the workflow routing based on your selections. When routing restrictions exclude all assignees, Workday skips the step as Not Required.

To prevent Workday from skipping the business process step due to routing restrictions, use alternate routings to identify alternate security groups for:

- Routing the transaction.
- Users specifically excluded from the transaction.

Organization role-based routing enables you to select which roles per organization returned by contextual security must take action before the business process can proceed to the next step. Organization role-based routing is only available on *Approval*, *Consolidated Approval*, and *To Do* business process steps.

Steps

1. View the *business process definition* for which you want to define routing restrictions, alternate routings, or organization role-based routing.
2. Select Business Process > Maintain Advanced Routing from the related actions menu of the business process step.
3. Enter the Effective Date. The default effective date is the current date.
4. Enter the Time Zone. The default time zone is the user's current time zone.

   When you select the Business Process Configuration Time Zone option on the Edit Tenant Setup - System task, you can enter a time zone. When you enter:

   - The current date, in the specified time zone, the changes take effect immediately. Users in other time zones see the changes immediately.
   - A future date, the changes take effect at midnight on that date in the specified time zone and at the corresponding date and time in other time zones.
   - A past date, the changes take effect at 23:59:59 on that date in the specified time zone and at the corresponding date and time in other time zones.
5. (Optional) Specify routing restrictions:

Option	Description
Exclude Initiator	Don’t route to the user who initiated the business process.
Exclude Prior Approvers	Don't route to users who have approved prior *Approval* steps in the business process. Workday identifies prior approvers as users

Option	Description
	who have completed *Approval* steps, not *Action* steps.
Exclude Event Subject	Don't route to the user who is the subject of the business process.

6. (Optional) Specify an alternate routing:

   To use an alternate routing rule, select a check box under the Routing Restrictions section.

Option	Description
Alternate Security Groups	Define security groups for alternate routing. The Alternate Security Groups prompt includes the security groups for the step (from the security policy for the business process definition), plus *Manager*. If *Manager* isn't a valid security group for the step, you can't select Relative to the transaction.
Relative to the transaction	Determines contextual security groups for alternate routing based on the context of the transaction.
Relative to the excluded user(s)	Determines contextual security groups for alternate routing based on the context of each excluded user.

   - Workday uses alternate security groups only when routing restrictions have eliminated all potential recipients. When a step didn't route to anyone before considering routing restrictions, Workday creates an unassigned task without checking alternate security groups.
   - When a business process administrator reassigns a step through role reassignment on the Unassigned Tasks report, Workday considers routing restrictions and alternate security groups because we evaluate the security of the next possible person to reassign the step to. However, when the business process administrator manually selects a person to complete the step on the Unassigned Tasks report, Workday doesn't consider routing restrictions.

   When Workday routes an *Approval* or *Approval Chain* business process event to an alternate security group based on routing restrictions for that business process step:

   - Approval by Alternate or Approval Chain by Alternate displays beneath Next Steps on the confirmation page after you submit the step.
   - Approval by Alternate or Approval Chain by Alternate displays for the step in the Process History of the business process.
7. (Optional) Under One User Per Group Per Organization Required, specify organization role-based routing. Add a row, and then select an organization role from the Group prompt. You can repeat this step to specify additional organization roles to which Workday can route a business process step according to the business process definition.

   - When you configure organization role-based routing on a business process step, Workday disregards any alternate routing you specified for that step. You can't select the All option for that step in the business process definition.
   - When you select an organization role from the Group prompt on a business process step that requires approval by multiple organizations, only 1 person assigned to that role for each organization must approve the business process step.
   - When you select an organization role that doesn't have anyone in a specific organization to route the *Approval* step to, Workday skips that organization. Workday still routes the step to individuals who have the role in other organizations. Example: An *Approval* step needs

approval from an HR Partner. The step is routed to 2 supervisory organizations: A and B. There's a role assignee in organization A, but not in organization B. Workday routes the step to organization A and skips organization B. Workday doesn't unassign the step because it was routed to organization A.

- When you select 1 or more organizations and there's no one in any of these organizations, Workday unassigns the step because there isn't anyone to route the *Approval* step to. Example: An *Approval* step needs approval from a Cost Center Manager. The step is routed to 3 Cost Center organizations: A, B, and C. None of these organizations has anyone assigned to them. Workday unassigns the step.

  For each organization, Workday recommends that you review the business process domain security policy to make sure there's at least 1 role assignee in the security group.

Example: A custom definition of the *Assign Costing Allocation* business process might contain an *Approval* step that the Cost Center Manager or HR Partner groups must complete. When you select Cost Center Manager from the Group prompt, the business process step is routed to all Cost Center Managers for all of the Organizations that must approve the step. However, only 1 Cost Center Manager for each organization must approve the step before the business process can proceed to the next step.

Maintain Specific Group Routing

Context

Certain business process types require you to specify existing and future values. Example: The *Change Organization Assignments for Worker* business process requires you to specify the existing and new organizations. These organizations typically have different people occupying different roles. However, in the business process definition, you can only select a security group such as Manager. You can’t specify whether Workday routes the business process step to the manager of the existing organization or the new organization.

You can use specific group routing for any business process step type in Workday if the security group has supervisory organization enabled for the assignable role on the Maintain Assignable Roles task.

For the *Change Job* business process, administrators can use specific group routing to specify whether the security group is for the organization of the Current or Proposed position.

For the *Offer* business process, administrators can specify whether the security group is:

- Current to route to the security group for all locations on the job requisition.
- Proposed to route to the security group on the candidate's offer proposed location.

This behavior also applies to the Ready for Hire dynamic completion step on the *Job Application* business process.

Steps

1. Access the business process definition for which you want to enable specific group routing.
2. From the related actions menu of the business process definition, select Business Process > Edit Definition, and then click OK.
3. Next to the Group specified for a business process step, click inside the Routing Modifier field. Select either Current or Proposed from the prompt.
4. Repeat Step 3 for every business process step for which you want to enable specific group routing.

Result

Workday routes the steps in the business process to the security group for the current or proposed assignment according to your specifications.

Set Up Multiple Position Routing

Prerequisites

To select a routing modifier for a security group, the access right for the security group on the Edit Security Group task must be either:

- Role has access to the positions they support.
- Role has access to all positions.

Security: These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*

Context

You can enable multiple position routing for business process step types that support the *Additional Positions* and *Primary Position* routing modifiers. Examples of business processes that support these routing modifiers:

- *Contact Change*
- *Edit ID Information*
- *Edit Licenses*
- *Give Feedback*
- *Request*

Workers don't need to have multiple positions when you use the *Current* and *Proposed* routing modifiers. Examples of business processes that support these routing modifiers:

- *Add Additional Job*
- *Change Job*
- *Employment Agreement*
- *Offer*

Workday disregards the routing modifier when you reassign a business process step.

Steps

1. Select Business Process > Edit Definition from the related actions menu of a business process.
2. Select *Additional Positions* or *Primary Position* from the Routing Modifier prompt on a business process step.

   When you don’t select a routing modifier, Workday routes the business process step to the specified security group for the worker's primary position and any additional positions.

   When you select *Additional Positions* and the worker has more than 1 additional position, Workday routes the business process step to the specified group for all relevant positions.

Related Information
Tasks
Create Role-Based Security Groups
Maintain Specific Group Routing on page 1045

Maintain Line Level Routing

Prerequisites

Enable line-level routing for the business process type.

Context

Business process administrators can enable line level routing on *Approval* and *Consolidated Approval* steps that are assigned to at least 1 Intersection security group.

Example: You can use line level routing to route to approvers based on the context of each line in a supplier invoice.

When you use a report field in a business process routing rule or step condition rule, and the field evaluates data at the document line level, you can't determine the line that's evaluated when there are multiple lines.

Routing modifiers aren’t respected in custom notifications. However, system notifications do respect line level routing.

Steps

1. Edit the business process definition.
2. Select Line Level in the Routing Modifier column of 1 or more *Approval* or *Consolidated Approval* steps in the business process definition.

   At least 1 security group on the step must be an Intersection security group.

Example

Create an Intersection security group that includes the Region Manager and the Cost Center Manager, and assign roles as follows:

- Cost Center Manager for Cost Center A: Anne and Adam
- Cost Center Manager for Cost Center B: Betty and Bob
- Region Manager for Region 1: Anne and Betty
- Region Manager for Region 2: Adam and Bob

The intersections are as follows:

- Cost Center A + Region 1: Anne
- Cost Center A + Region 2: Adam
- Cost Center B + Region 1: Betty
- Cost Center B + Region 2: Bob

Your supplier invoice has 2 lines that are based on these contexts:

- Line 1: Cost Center A, Region 1
- Line 2: Cost Center B, Region 2

Create an *Approval* step that routes the transaction to the Intersection security group that includes the Region Manager and the Cost Center Manager.

- When you enable line level routing:
  - Line 1 Intersection security group is Anne.
  - Line 2 Intersection security group is Bob.
  - Workday routes the supplier invoice to Anne and Bob.
- When you don't enable line level routing:
  - The entire supplier invoice routes to Adam, Anne, Betty, and Bob for approval.
  - Workday doesn't evaluate the intersection of Region Manager and Cost Center Manager on each line individually.
  - Workday doesn’t evaluate individual lines when using report fields in condition rules.

Next Steps

Use the Business Process Steps with Line Level Routing report field to track which business process steps are enabled for line level routing.

Define Order of Parallel Steps in My Tasks

Prerequisites

Security: These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*

Context

Workday enables business process administrators to control the order in which parallel steps in a business process display in My Tasks relative to other parallel steps.

Steps

1. Edit the business process definition.
2. In each step with the same Order, type one or more letters in the Parallel Step Order in My Tasks column.

   When you save the business process definition, Workday sorts the business process steps alphabetically.

Result

Workday displays items in My Tasks in the opposite order specified in the business process definition if you sort your My Tasks by Newest on Top. The older task (or the next task) is at the bottom of My Tasks, and newer tasks display at the top.

Example

When a business process administrator sets up parallel steps in this order in the business process definition:

- ca: Add Photo
- cb: Complete Form I-9
- cc: Change Emergency Contacts

Workday displays the tasks in this order in MyTasks:

- Change Emergency Contacts
- Complete Form I-9
- Add Photo

When one of the parallel steps is worked on and saved for later, the order relative to other steps parallel to it isn't maintained.

Next Steps

To match the parallel step order with the order in which the tasks display in My Tasks, sort My Tasks by Oldest on Top, or reverse the order of the steps in the Parallel Step Order in My Tasks column on the business process definition.

Related Information
Concepts
Concept: My Tasks on page 1209

Steps: Set Up Auto-Manage Business Processes Service Step

Prerequisites

Security: These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*

Context

You can configure the *Auto-Manage Business Processes* service step on a business process definition. The configuration enables Workday to take action on business processes automatically, based on the rules you define for the step. This service step can help reduce manual effort and maintenance of external systems. You can't configure this service step in parallel with another step. You can add the step multiple times on these business processes:

- *Change Job*
- *End Contingent Worker Contract*
- *Request Leave of Absence*
- *Termination*

Steps

1. Access the Edit Tenant Setup - Business Processes task.

   Configure a user on the User to Perform Automated Business Process Actions prompt. You can't remove the user later, but you can replace them with another user. Workday recommends that you select a user that's unlikely to change.

   Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.
2. Edit Business Processes on page 1005.

   On the business process definition, add:

   - The *Auto-Manage Business Processes* service step.
   - An *Action* step after the *Auto-Manage Business Processes* service step, and select *Manage Business Processes for Worker* in the Specify column. When you add the *Manage Business Processes for Worker* as an *Action* step, Workday catches business processes that the *Auto-Manage Business Processes* configuration rules might not handle.
3. Configure the *Auto-Manage Business Processes* service step.

   As you complete the task, consider:

Option	Description
Business Processes About the Person	Configure rules to take action automatically on business processes that are about the worker and still have remaining steps. Example: A worker is supposed to update their personal information, such as their contact information. You can: • Cancel the business process. • Advance the business process to the end. To configure these actions, the worker must have the worker role assigned to them for the service step to manage their business processes.

Option	Description
	Clear the Suppress Notifications check box if you want Workday to send system and custom notifications when running the automation rule action.
Business Process Steps Assigned to the Person	Configure rules to take action automatically on business process steps that await the worker's actions. Example: A manager is supposed to give feedback to one of their workers. You can: • Reassign the steps to someone else. When you select the *Reassign to Security Groups* action, you can select what security groups to reassign the step to. You can only reassign the step to security groups that are valid for that step type on the business process security policy. To reassign the step to a group that's not in the security policy for that step type, you must add the group to the business process security policy. • Remove the person as an assignee only if there are other assignees.

You can't specify more than 50 automation rules in either grid.

Result

Workday evaluates the rules for business processes about the person and then rules for business process steps assigned to the person. For each business process or business process step, we evaluate the automation rules in order until an automation rule is valid. An automation rule is valid if the criteria is met and the action can be taken on the business processes. When criteria is met but the action can't be taken, we move to the next rule.

When the *Auto-Manage Business Processes* service step takes action on a business process event or step, we display on the process history for that process or event:

- The comment you configure for the automation rule.
- The person you configure to perform automated business process actions.

The *Auto-Manage Business Processes* service step runs a scheduled job in the background every 15 minutes. There might be a 5-30 minute delay before the *Auto-Manage Business Processes* service step completes processing and moves to the next step. When there's a large amount of data to process, the delay can be more than 1 hour.

Related Information

Concepts

Concept: Manage a Worker's My Tasks Items on page 1064

Setup Considerations: Auto-Manage Business Processes for Worker on page 1028

Reference

Reference: Edit Tenant Setup - Business Processes on page 27

The Next Level: Auto Manage Business Processes for Worker

Examples

Example: Set Up Auto-Manage Business Processes Service Step on page 1066

Steps: Enable Attachments on an Individual Business Process

Prerequisites

- The business process type supports attachments. To confirm this, you can run the Business Process Configuration Options report and refer to the Allows Attachments column.
- Access to these actions in the Attachment Settings in BP Toolbar section of the business process security policy:
  - View Permissions
  - Edit Permissions
  - Manage Attachment Permissions
- Security: These domains in the System functional area:
  - *Set Up: Tenant Setup - BP and Notifications*
  - *Business Process Administration*

Context

You can enable attachments at the tenant level, or as described below, on individual business processes so that you can attach documents to *Initiation* and *Action* steps.

Note: This functionality applies only in cases where the business process framework adds a toolbar (that can include comments and attachments sections) at the bottom of business process-related tasks. Business processes that you can attach documents to using an additional Attachments grid aren't affected when you enable or disable this attachments functionality. Example: The *Change Benefits* business process.

Steps

1. To enable attachments at the tenant level:

   Access the Edit Tenant Setup – Business Processes task and select the Enable Attachments check box. If enabled, users in specific security groups can upload attachments from the business process toolbar for allowed business processes.

   To enable attachments on individual business processes:

   - Select Business Process Policy > Edit from the related actions menu of the business process definition and select the Enable Attachments check box in the Attachment Settings in BP Toolbar section to reveal the configuration options.
2. When you enable attachments on a business process security policy, you can then configure user access.

   Note: If you don't configure the attachment security on a business process security policy, the security is automatically inherited from the business process security policy for the appropriate business process step. Example: Permissions on attachments for the *Review Position Request* step of the *Create Position* business process are granted to the same security groups that can access the *Review Position Request Action* step in the business process security policy.

   As you complete the Attachment Settings in BP Toolbar section, consider:

Option	Description
View Permissions	(Optional) Select the security group(s) for whom you want to grant view access on documents attached to the business process. When you select a security group with permission to view attachments, you must also select a security group with permission

Option	Description
	to edit (modify the document category and description, upload, or delete) attachments.
Edit Permissions	(Optional) Select the security group(s) for whom you want to grant edit permission on documents attached to the business process.
Manage Attachment Permissions	Select who can add, edit, and view attachments on the business process.
Allow Attachments within Emails	Enables attachments in notification emails. For example, you can set up custom notifications with PDF attachments, such as an offer letter distributed through the *Offer* business process. Selecting this check box enables an Attachment(s) section when you navigate to Business Process > Add Notification from the related actions menu of a business process. The options available in the Attachment(s) field are predefined attachments for the business process definition. You can't select a file from your computer. Note: Workday doesn't scan attachments for viruses.

3. Click OK.
4. After enabling attachments on an individual business process, activate the changes using the Activate Pending Security Policy Changes task.

Result

Users can select 1 or more files to attach to the business process, or drag and drop files into the Attachments section. Workday displays the Attachments:

- Icon for security groups with permission to edit attachments.
- Section for security groups with permission to view attachments.

You can view attachments in the Attachments section of the Details tab on the:

- Conclusion page of the business process step
- Confirmation view of the business process
- Business process event
- Full Process Record

Workday adds attachments to the worker document file if the business process is worker-related, such as *Hire*, *Onboarding*, and *Request Leave of Absence*.

You can delete and upload attachments for business process events in any status by selecting Manage Attachments from the business process event-related actions menu. This includes attachments uploaded from a *Review Documents* step. You can't reverse a delete action. After the task is submitted, the business process history displays Attachment Corrected.

Related Information
Concepts

Concept: Business Process Templates on page 1024

Concept: Business Process Step Attachments on page 1059

Tasks

Edit Business Process Security Policies

Steps: Manage Access to Documents on page 375

Steps: Set Up Job Changes

Reference

Reference: Edit Tenant Setup - Business Processes on page 27

Reassign Tasks

Prerequisites

Security: *Business Process Administration* domain in the System functional area.

Context

When you have the correct security permissions, you can reassign:

- Your own tasks from your My Tasks.
- Tasks for other people. You can reassign business process steps to a person with a non-worker role, such as a student or extended enterprise learner.
- Tasks from a non-worker to another person. A non-worker role can include: academic affiliate, extended enterprise learner, student, and worker.
- A step to a terminated worker if they have an active Workday account.

You can't reassign steps to a person that doesn't have an active Workday account, like a candidate.

You can configure which security groups can reassign tasks using the Reassign Tasks task by adding the security group with Modify permission on the *Business Process Administration* domain security policy. This enables those security groups to use the task to reassign tasks for all business processes.

If you want to enable security groups to reassign tasks for specific business processes using the Reassign Tasks task, you can configure the Reassign Tasks permission action for each business process security policy. The configured security groups on the business process security policy as well as those assigned to the *Business Process Administration* domain receive notifications to review reassignment requests and to reassign tasks associated with the business process. You don't need to be a member of both the security groups on the business process security policy and the domain to have this access.

You can configure which security groups can request reassignment of their tasks in My Tasks using the Request Reassignment permission on business process security policies. By default, Workday displays All Users in the Security Groups prompt. Clearing the Security Groups prompt restricts anyone from requesting reassignment for tasks in that business process.

Steps

- To request reassignment of your own tasks:
    a) In My Tasks, select the Task Actions icon, then Reassign.
    b) Select the person or role in the Proposed Person column. The business process security policy determines the list of available roles for the step type. Example: Only someone in the Security Partner role can complete the *Create a User Account* action.
- To reassign tasks for other workers or from a non-worker:
    a) Access the Reassign Tasks task.
    b) As you complete the task, consider:

Option	Description
Reassign Non-Delegated Tasks	Select this option to reassign tasks that weren't delegated because:

Option	Description
	• Both the Delegate and the Alternate Delegate were excluded by routing restrictions. • The task is part of a *Review Documents* step configured to use an eSignature Integration Type and all assignees in the current signature group have active delegations.
Reassign Tasks for Person	Select this option to reassign business process steps from a person that has a non-worker role. You can reassign a task from a person with a role such as: • Academic Affiliate. • Extended Enterprise Learner. • Student. • Worker. When the task is reassigned: • The Full Process Record displays the person that received the task as the awaiting person. • A notification is sent to the person and the task is in their My Tasks.
(Optional) Business Process Step Initiated in Date Range	Select a date range for steps for the task to search.

Result

When you request reassignment of your own task, Workday sends notifications to these people to approve the reassignment:

- Members of security groups specified in the Reassign Tasks permission on the business process security policy for the business process associated with the reassigned task.
- Members of all security groups with Modify permissions on the *Business Process Administration* domain security policy.

When the reassignment request is approved, Workday permanently moves responsibility for the task from the original worker to the reassigned worker.

When you use the Reassign Tasks task, Workday permanently moves responsibility for the task from the original worker to the reassigned worker without requiring additional approval.

When an *Action*, *Approval*, or *To Do* step is configured to be excluded from My Tasks and you reassign the step to another person, this step won't display in the new assignee's My Tasks because it's excluded. The assignee can access the Business Process Transactions Awaiting Me report to take action on the task.

Related Information

Concepts

Concept: Exclude Business Process Steps from the My Tasks on page 1065

Tasks

Delegate My Tasks on page 1082

Concept: Business Process Management

This topic describes what you can do with a business process, including:

Cancel and Rescind

For multiple business processes, Workday enables you to:

- Cancel processes that are in progress.
- Rescind changes that are past the completion step.

You can cancel some business processes initiated as subprocesses without canceling the parent business process. To determine if you can cancel a particular business process, access the Business Process Configuration Options report.

When you cancel:

- The overall business process, Workday skips the subprocesses regardless of their status and cancels any completed subprocesses.
- A subprocess by itself, Workday skips the subprocess without canceling the parent business process.
- A required subprocess after the parent business process has completed, Workday still completes the business process.

When you rescind a business process that includes subprocesses, Workday rescinds all actions in the business process configuration. Example: When you rescind a termination that includes a one-time payment, Workday rescinds both the termination and the payment.

You can rescind some subprocesses individually without rescinding the parent business process.

On a single business process, you can access the related actions menu of the:

- In-progress business process to cancel it.
- Completed business process to rescind it.

You can also cancel or rescind business processes in bulk by accessing these tasks:

- Mass Cancel Business Processes: When a business process includes subprocesses, you can cancel the subprocesses individually or cancel the parent business process.
- Mass Rescind Business Processes: The Business Processes Loaded by EIB prompt on this task displays integration events loaded by an EIB where you can rescind at least 1 of the business process events. Workday recommends that you limit the date range when you select In Date Range, By Integration System or In Date Range, All Integration Systems prompt option.

You can stop notifications for each business process you cancel or rescind. When you cancel or rescind business processes, you can't undo the action.

Workday creates an audit trail documenting the rescind and cancel actions. You can configure custom notifications and alert notifications to trigger when you:

- Rescind an action.
- Correct a business process.

Example: Logan McNeil initiates a *Hire* business process that includes these subprocesses:

- *Propose Compensation*
- *Request One-Time Payment*

The business process administrator configures the *Hire* business process to require both subprocesses, and the *Request One-Time Payment* subprocess is the *Completion* step for the hire.

When the *Propose Compensation* step is in progress, and Logan cancels the *Request One-Time Payment* step only, Workday:

- Changes the status of the *Request One-Time Payment* step to *Manually Skipped*.
- Completes the *Hire* business process.

Mass-Cancel Review Documents Step

You can use the Mass Cancel Review Document Step task to cancel *Review Documents* steps as a mass action. You can cancel *Review Documents* steps on business processes that have a status of:

- *In Progress*
- *Successfully Completed*

Example: You want to cancel outstanding *Review Document* steps assigned to workers during the *Onboarding* business process. When the *Onboarding* business process successfully completes, the only way to cancel remaining *Review Documents* steps is to use the Mass Cancel Review Document Step task.

The maximum number of *Review Document* steps you can cancel at one time is 2,000.

Manually Advance

You can manually advance a business process to the next step, or to the end, to prevent delaying the business process. Example: A task is awaiting an approver that's unavailable. To prevent a delay in the business process, you manually advance the business process to the next step.

You must be in a security group with access to the Manual Advance action in the Who Can Do Actions on Entire Business Process section of the business process security policy. Users with this access can initiate the Mass Advance Business Process task, but they can only process transactions that match the business process types allowed for their security group. To determine if you can manually advance a business process, access the Business Process Configuration Options report.

You can use the Mass Advance Business Process task to advance business processes en masse. When you use the task to advance more than 10 business process events, Workday runs the task in the background. If you apply a filter on the Mass Advance Business Process task and click Select All, the selection includes all items, and not the filtered list only. For high-volume transactions on business processes that require detailed filtering, Workday recommends that you use the Mass Operation Management (MOM) task instead of the Mass Advance Business Process task to avoid filtering issues.

You can edit the business process definition to disable system notifications when a business process is manually advanced.

When you enable the Enable Advancing Unassigned Tasks check box on the Edit Tenant Setup - Business Processes task, you can advance an unassigned step within a business process through the:

- Advance Business Process Mass Operation Management type.
- Advance Manually related action. (Select Business Process > Advance Manually from the related actions menu of the business process event.)
- Mass Advance Business Process task.

You can advance:

- From an unassigned step that's pending reassignment.
- Through an unassigned step and multiple subsequent unassigned steps.

- A business process to completion through an unassigned step that generates a reassignment during processing of the advancement.

When an event is sent back to an unassigned step, the step becomes unassigned. During send back, the To prompt displays Unassigned as the prefix to the step name. Example: *Unassigned - Complete Questionnaire*. When Workday advances through unassigned steps, the Process History tab on the Full Process Record displays the status of:

- Manually Advanced for the unassigned step.
- Canceled for the reassigned event.

Workday sends a notification to the:

- Business process step assignee when you advance 1 or all events to completion (except for steps that are delayed or unassigned).
- Assignee for the manually advanced step when manual advance occurs.

Workday doesn't send notifications when a reassigned event is canceled.

You cannot manually advance a step that is marked as Do Not Advance in the business process definition. This functionality is only available for steps that you can assign to a security group. Steps that you can't assign to a security group, with the exception of a *Report* step, can't be marked as Do Not Advance. To determine if a step is marked as Do Not Advance, refer to the Do Not Advance check box in the business process definition.

Manually Send Back

Send back is a business process action. Performing a send back action usually means a user receives an item in their Workday My Tasks and the user wants to send the item back to the person who previously completed the step. Example: Mike fills out and submits a *Complete Questionnaire* step. The item is then routed to Mike's manager, Betty, to review and approve. Betty receives the item in her My Tasks to approve. Instead of approving the item, she sends it back to Mike to make a correction.

You can send back a business process manually at any time, even when the step isn’t assigned to you.

You can't send back all business processes. To determine whether you can manually send back a business process, access the Business Process Configuration Options report.

You must be in a security group with access to the Manual Send Back action in the Who Can Do Actions on Entire Business Process section of the business process security policy.

To manually send back a large number of action events at one time, you can run the *Send Back Business Process* Enterprise Interface Builder (EIB). You must have permission to run EIBs and permission on the business process security policy to perform this action on the event for the business process type. For each event in this EIB that allows manual send back, Workday sends the event back to a completed step of the business process that allows this action. When you are on the *Initiation* step of:

- A subprocess, you can send the event back.
- The parent business process, you can't send the event back.

Workday recommends that you manually send back a sample event in your tenant before you attempt to do a mass send back. The sample event should be from the same business process definition as the other events you want to send back.

You can access the Manual Send Back task from the related actions menu of the business process event. When the status of the business process event is:

- *In Progress*, the Send Back To prompt displays all of the previous steps that you would typically see in the Send Back prompt from within the business process toolbar. When you have multiple security groups configured on a step, and you manually advance the step but then manually send it back to where you manually advanced it from, Workday displays all awaiting persons for the step in the prompt. Example: *Previously Awaiting Persons (4): (Dawn Myers, Logan McNeil, Betty Liu, Steve Morgan)*

– *Complete Manager Evaluation*. When you select the prompt option, Workday sends the step back to all previously awaiting persons.
- *Completed*, the Send Back To prompt displays only the previous steps that allow the Manual Send Back by Administrator on Completed Event.

When you attempt to manually send back a business process to a step that you configured to run in parallel with another step and:

- Both steps are *In Progress*, you can't manually send back the business process to either of the parallel steps.
- 1 step is *In Progress* and the other step is *Completed*, you can manually send back the business process to the *In Progress* step.
- Both steps are *Completed*, you can manually send back the business process to either of the parallel steps.

When you send the business process event back, the process history displays the step with a *Manual Send Back* status.

When you configure an *Action*, *Approval*, or *To Do* step to be excluded from My Tasks and you send a step back to the excluded step, the step doesn't display in My Tasks. You can still send back a step from the excluded step using the Business Process Transactions Awaiting Me report.

The business process administrator can reassign excluded steps by using the:

- Reassign Business Process Step mass operation type on the Mass Operation Management task.
- Business Process > Reassign This Task related action from an event.
- *Reassign Business Process Step* web service.

You can't use the Reassign Tasks task to reassign excluded steps.

When you send back an event to a worker that has a future-dated business process that changes their worker type, such as from a contingent worker to an employee, Workday sends the event back to the assigned worker. The step doesn't go unassigned.

Example: James is a contingent worker and his contract ends on 2023-09-10. The company submits the business process to hire him as a staff employee. The hire process completes and effective 2023-09-15, his role changes to a staff employee. On 2023-09-08, James submits an I-9 form. On 2023-09-14, an HR Partner sends back the I-9 form to James to correct. He receives the sent back task on 2023-09-15.

Reassign Unassigned Tasks

A task becomes an unassigned task when the specified security group doesn't contain a user, or contains only users with disabled Workday accounts. Example: If a step is secured by the *Employee as Self* security group but the assigned user has a future hire date, the task is unassigned. A task can also be unassigned if the assigned user's Workday Account is disabled, expired, or locked, or if the assigned user has no user ID and password and cannot access Workday to see their notification or complete their assigned step. The Unassigned Tasks report displays steps where this is the problem.

Business process administrators can reassign unassigned tasks to workers or to Affiliate role holders in the required security group. Workday sends a notification email to members of all security groups with View and Modify permissions to the *Business Process Administration* domain when a task becomes unassigned.

From My Tasks, you can reassign tasks that are unassigned. On the Unassigned Task item, you can reassign:

- A single unassigned task by selecting a person in the Reassign To prompt.
- Multiple unassigned tasks by clicking View Unassigned Tasks. This enables you to filter and view additional unassigned business process tasks. We recommend that you filter the list of unassigned tasks by business process, date range, or both. Once you apply a filter, you can reassign steps on the Business Process Unassigned Step Audit report.

From an Unassigned Tasks item, you can also click View Details under the gear icon. When you click the Reassign button in the grid, Workday displays the Unassigned Task report where you can reassign a single unassigned task or multiple unassigned tasks.

You can also reassign unassigned tasks by accessing the Unassigned Tasks report.

Correct a Business Process

You can correct business processes only when the business process security policy specifies the security groups that can correct a business process instance.

You can configure Workday to send custom and alert notifications on business process corrections.

Delete Comments from a Business Process

Business process administrators can remove 1 or more comments from a business process, either before or after the business process is completed.

From the related actions menu of the overall business process (not from a business process step), select Business Process > Remove Comments. You can then select the check box next to each comment that you want to remove, and click OK.

Similarly, if a comment has been made on a subprocess, you can remove the comment as a related action on the subprocess, not from an individual step within the subprocess.

Inactivate a Business Process Definition

To define a custom business process, you must associate it with a business object, typically an organization. The business process definition is then available within that organization. When the organization has a hierarchy, Workday links all subordinate organizations to that business process definition until reaching a subordinate organization that's linked to a different business process definition.

Workday uses the default business process definition when you haven't:

- Associated a business process definition with any superior supervisory organization in the hierarchy.
- Defined a custom business process for the supervisory organization or other organizations in the superior supervisory organization hierarchy.

When you inactivate a custom business process for a specific business object, such as an organization, and then initiate the business process, Workday uses the custom business process associated with the supervisory organization.

Make sure that there's always an appropriate custom business process defined.

On the Inactivate Business Process Definition task, you can specify the business objects for which you want to activate the custom business process. When you inactivate a custom business process for all business objects, Workday completely removes it and you can't reactivate it.

Related Information

Concepts

Concept: Exclude Business Process Steps from the My Tasks on page 1065

Tasks

Correct Staffing Events

Create Custom Notifications on page 1091

Steps: Set Up EIBs Using Templates from Web Service Operations

Reference

Reference: Edit Tenant Setup - Business Processes on page 27

Concept: Business Process Step Attachments

You can attach documents to *Initiation* and *Action* steps of a business process.

Example: You can attach documents to the *Employment Agreement* or *Offer* business processes that are then distributed to candidates. Similarly, you can enable attachments on the *Request Delegation Change* business process to allow business process administrators to attach instructional documents, for example, when delegating items on the Manage Delegation Settings task.

Note: You can only view document attachments on *Approval* steps.

Downstream participants in the business process can review and approve attachments. You can:

- Use the business process security policy to control who can view and edit attachments.
- Enable or disable attachments for a specific business process or at the tenant level.
- Attach a document means to include it as part of the business process, without the need to preconfigure it.
- Attach documents when you revise a business process step, or correct a business process event.

Security

To control access to attachments, you can create security segments that limit the document categories that are visible to a role. Security segments specify the document categories that the role can create, edit, or view. Grant permissions on attachments to segment-based security groups with access to specific document categories, and then add these groups to the business process security policy.

Business processes that use templates might require you to add users to the attachments domain for the business process.

Note: If you don’t configure the attachment security on a business process security policy, the security is automatically inherited from the business process security policy for the appropriate business process step. Example: Permissions on attachments for the *Review Position Request* step of the *Create Position* business process are granted to the same security groups that can access the *Review Position Request Action* step in the business process security policy.

Attachment Actions

When document categories are enabled for a business process, you must enter the document category when you upload an attachment. For more information on document categories, see Set Up Document Categories.

Initiators can upload only those files to which they have access based on the document category segment security.

Reviewers can review, modify the document category and description, upload, or delete only those files for which they have access according to document category segment security.

Approvers can review and approve only those files to which they have access based on document category segment security.

Tenant Level and Individual Business Process Settings

You can enable attachments at tenant level or on individual business processes.

When the tenant level Enable Attachments setting on the Edit Tenant Setup – Business Processes task conflicts with the Enable Attachments setting on an individual business process security policy, Workday honors the most recent setting change made.

Example: On 2024-05-16, you access the Edit Tenant Setup - Business Processes task and clear the Enable Attachments check box. On 2024-06-15, you access the business process security policy and select the Enable Attachments check box. Then, on 2024-06-20, you edit a field on the Edit Tenant Setup - Business Processes task. Workday will honor the Enable Attachments setting on the Edit Tenant Setup - Business Processes task because this task was most recently updated. In this example, attachments are now disabled for any business process.

When you make changes to the Edit Tenant Setup - Business Processes task, the business process security policy audit trail doesn’t display any changes made to the Edit Tenant Setup – Business Processes task. Similarly, when you make changes to the business process security policy, the Edit Tenant Setup - Business Processes audit trail doesn't display changes made to the business process security policy.

Workday recommends that you review both the Edit Tenant Setup - Business Processes task and business process security policy audit trails to see all changes made to these settings.

Related Information
Tasks
Steps: Enable Attachments on an Individual Business Process on page 1051

Concept: Autocomplete Business Processes

Autocomplete enables business process administrators to configure business process definitions to complete an event automatically when the appropriate data for the event has been captured and entered in another business process. Autocomplete helps reduce manual effort and streamline your business processes.

You can enable autocomplete on these business process definitions to automatically complete hire events or job changes that initiate from Workday Recruiting:

- *Add Additional Job*
- *Change Job*
- *Contract Contingent Worker*
- *Hire*

Example: You configure autocomplete on your *Hire* business process so that Workday automatically completes the initiating step using information provided by Workday recruiting, skipping steps that aren't subprocesses of the hire event.

You can enable autocomplete on parent and subprocesses but not on dynamic business processes. You can specify business process steps to manually process.

When an event has autocomplete enabled on the business process definition, Workday attempts to complete the event automatically. If the event can't autocomplete, Workday enables you to process the event manually and execute the remaining steps in the business process definition.

Autocomplete also decreases the number of My Tasks items for users to complete by skipping some parts of the parent event, including:

- Approvals
- Batch/Job
- Checklist
- Complete Questionnaire
- Edit Additional Data
- Report
- Report Group
- Review action step
- To Do

As a result, Workday doesn't create event records for any steps skipped by autocomplete. You won't see event record entries for skipped steps in the Process History on the Full Process Record.

If you would like skipped steps to run even when an event successfully autocompletes, Workday recommends that you configure the Route Normally prompt for business processes and specify the skipped steps you would like to execute.

The route normally functionality isn't available for *Review* and *Approval* steps. For scenarios where you would like reviews and approvals to route normally, Workday recommends you create a rule-based business process and not select the Enable Autocomplete check box. This enables the event to route normally and execute all steps.

Integrations and service steps always route normally. Configure autocomplete only for events that aren't likely to need additional information or manual input.

When you enable the Enable Autocomplete check box on the business process, Workday triggers custom business process notifications. If you don't want custom business process notifications sent, you can configure a step condition using the Event Autocompleted report field on the Action Event business object to not trigger the custom notification.

Related Information

Reference

Setup Considerations: Autocomplete Staffing Events

Concept: Bulk Approve Business Processes

When a business process is enabled for bulk approval, you can approve items in bulk by selecting the Bulk Approve prompt option in your My Tasks. You must have Modify permission on the *Inbox: Business Process Bulk Approval* domain security policy in order to perform this action.

You can access the Business Process Configuration Options report to determine if a business process supports bulk approval on *Approval* and *Action* steps. On this report, if the:

- Limited Approval Not Allowed column is empty, you can bulk approve *Approval* steps for this business process.
- Allow Limited Approval column displays Yes, you can bulk approve *Action* steps for this business process.

The My Tasks item can't be part of a consolidated approval.

When you access the Bulk Approve task, we display the total number of items you're viewing above the grid. Example: *Viewing: 38 items*.

You can apply a filter to the grid and only approve the filtered items. To bulk approve only items returned by the filter, apply a filter to the grid first and then select all rows by clicking the check box in the header. We display the number of filtered items and the number of rows selected to bulk approve. Example: *Viewing: 9 of 38 items, 9 selected*. This means your filter returned 9 items and 9 rows are selected to bulk approve.

When you select all rows in the grid and then apply a filter, we'll bulk approve all rows and not just filtered items.

On the Bulk Approve task, you can only approve 100 items at a time.

My Tasks Filters

When you want to approve *Approval* or *Action* steps in bulk, Workday takes into consideration the My Tasks filter you have set. Only My Tasks items included in the selected My Tasks filter will display in the Bulk Approve task. The Favorites My Tasks filter doesn't apply for bulk approval of business processes.

Validation Conditions

When the *Approval* or *Action* step has a validation condition with a severity of Critical, you won't be able to bulk approve it. But if the validation severity is a Warning, you can bulk approve it.

Custom Validation Rules

When you access the Bulk Approve task using the Bulk Approve filter in My Tasks, Workday displays eligible events that you can approve in bulk in the Bulk Approve grid. When the event has a validation severity of:

- Critical: Workday doesn't display the event in the Bulk Approve grid.
- Warning: Workday displays the event in the Bulk Approve grid, and the Has Exceptions check box is selected. When an event doesn't have a validation condition, it will also display in the grid.

Delegation

When you configure delegation, Workday doesn't display delegated items in the Bulk Approve task for the delegate. But when the delegate switches accounts to act on behalf of the delegator, the items will display in the Bulk Approve task.

Example: Betty sets up delegation and selects Steve as her delegate. A task is awaiting action from both Betty and Steve. Since it's a delegated task, Steve won't see it in the Bulk Approve task when he accesses My Tasks. The task will still display in My Tasks since it is awaiting action from them. When Steve switches accounts and acts on behalf of Betty, he will see delegated items in the Bulk Approve task.

Related Information
Concepts
Concept: My Tasks

Concept: Auto-Manage Business Processes for a Worker

You can configure the *Auto-Manage Business Processes* service step on a business process definition, enabling Workday to automatically take action on business processes based on the rules you define for the step. You can add *Auto-Manage Business Processes* as a service step multiple times on these business processes:

- *Change Job*
- *End Contingent Worker Contract*
- *Request Leave of Absence*
- *Termination*

The *Auto-Manage Business Processes* service step enables you to configure rules to automatically take action on:

- Business processes that involve a worker and have remaining steps. Example: Performance review. You can either cancel the business process or advance the business process to the end. The worker must have the worker role assigned to them for the service step to manage their business processes.
- Business process steps that await the worker's action. Example: Approving expense reports for a direct report. You can either reassign the steps or remove the person as an assignee only if there are other assignees.

In the Edit Tenant Setup - Business Processes task, you can select a user to perform automated business process actions. This enables you to configure the *Auto-Manage Business Processes* service step on a business process definition and for the step to run successfully.

After you add the service step to the business process definition, you need to configure the rules and the action to automatically take on business processes.

Workday evaluates the rules for business processes about the person and then rules for business process steps assigned to the person. For each business process or business process step, we evaluate the automation rules in order until a rule is valid. An automation rule is valid if the criteria is met and the action can be taken on the business processes. When criteria is met but the action can't be taken, we move to the next rule.

You can't specify more than 50 automation rules in the grids.

When the *Auto-Manage Business Processes* step takes action on a business process event or step, we display on the process history for that process or event:

- The comment you configure for the automation rule.

- The person you configure to perform automated business process actions.

Related Information

Concepts

Setup Considerations: Auto-Manage Business Processes for Worker on page 1028

Reference

Reference: Edit Tenant Setup - Business Processes on page 27

The Next Level: Auto Manage Business Processes for Worker

Examples

Example: Set Up Auto-Manage Business Processes Service Step on page 1066

Concept: Manage a Worker's My Tasks Items

The Manage Business Processes for Worker task enables you to access Workday My Tasks items for another worker from a single, convenient location. This item is also available as a subprocess on certain event types. On the Manage Business Processes for Worker task, you can take action on behalf of a worker in these areas:

- My Tasks Assigned to Worker: Typically, the only action you can take on My Tasks items assigned to a worker is to Reassign them to another worker. However, you can Cancel the business process if cancellation is allowed. You can optionally add a comment to clarify the reason for reassigning the task or canceling the business process, which displays in the event history. The Assigned To column displays a numerical value if there's at least 1 awaiting person the step is awaiting action from. You can drill down on the value to view all assignees that a step is awaiting action from.

  Workday loads the worker's My Tasks items when you scroll down in the My Tasks Assigned to Worker grid. When the worker has 1000s of My Tasks items and you filter or sort the grid, the grid might take longer to load. If that occurs, remove the filter or sort that you're using.

  You can submit up to 350 rows on the My Tasks Assigned to Worker tab. If you exceed this limit, you must access this task again and reselect your actions on the tab.
- Business Processes about the Worker: You can cancel selected business processes about the worker only if the business process can be canceled and you have permissions to cancel the business process. If you don't have the permission to cancel the business process, Workday generates a cancellation request to the Business Process Administrator to approve the cancellation. You can optionally add a comment to clarify the reason for canceling the business process about the worker, which displays in the event history.
- Delegations to the Worker: You can view My Tasks items that have been delegated to a worker to take action on. These can be single-task delegation or My Tasks delegation for a specific time period.

The Manage Business Processes for Worker task is secured to the *Business Process Administration* domain. Before reassigning a worker's My Tasks items, the Business Process Administrator must verify that the assignee has the permissions needed to take action on these tasks. The assignee must belong to a security group specified in the Who Can Do Actions on Entire Business Process section of the associated business process security policy.

Manage Business Processes for Worker Step

You can configure the Manage Business Processes for Worker as an Action step on these business processes:

- *Change Job*
- *Demote Employee*
- *End Contingent Worker Contract*
- *Promote Employee*
- *Request Leave of Absence*
- *Terminate Employee*

- *Transfer Contingent Worker*
- *Transfer Employee*

If you don't configure the Manage Business Processes for Worker as an Action step on the *End Contingent Worker Contract* and *Termination business process definitions*, Workday creates an audit exception, and displays a warning message stating that the step should be added to this business process definition to prevent transactions awaiting a terminated employee.

Before entering the Manage Business Processes for Worker step, Workday checks if any of these are true:

- The worker currently has a delegated item in their My Tasks.
- There’s a scheduled delegation with the worker as a delegate. This includes a delegation with a future effective date.
- There's currently an in-progress event about the worker that can be canceled. This excludes the event this step is on.
- The worker has a My Tasks item awaiting their action that can be canceled or reassigned. This includes a business process step they’ve delegated and isn't retained or accessible in their My Tasks.

When any of these criteria are true, Workday enters the step and routes it to all participants for the step.

Auto-Manage Business Processes Service Step

You can configure the *Auto-Manage Business Processes* service step on a business process definition, enabling you to configure Workday to automatically take action on business processes based on the rules you define for the step. You can add *Auto-Manage Business Processes* as a service step multiple times, and on these business processes:

- *Change Job*
- *End Contingent Worker Contract*
- *Request Leave of Absence*
- *Termination*

The *Auto-Manage Business Processes* service step enables you to configure automation rules to automatically take action on:

- Business processes about the worker that still have remaining steps. You can either cancel the business process or advance the business process to the end. The worker must have the worker role assigned to them for the service step to manage their business processes.
- Business process steps that are awaiting the worker’s action. You can either reassign the steps to someone else or remove the person as an assignee if there are other assignees.

Related Information
Tasks
Steps: Set Up Auto-Manage Business Processes Service Step on page 1049

Concept: Exclude Business Process Steps from the My Tasks

You can configure these business process step types on a business process definition so that Workday doesn't deliver My Tasks notifications for high-volume business process steps:

- *Action*
- *Approval*
- *To Do*

When you configure these steps, you improve My Tasks performance and the user experience, enabling you to easily find relevant tasks in your My Tasks.

Once you configure the step, you can still access any excluded My Tasks items from the:

- Business Process Transactions Awaiting Me report. When you access the report on a mobile device, you won't be able to act on excluded My Tasks items from the report.
- Expense Report Work Area.
- Recruiter Hub.

You can configure the steps by selecting Business Process > Maintain My Tasks Display from the related actions menu.

Configuring a step to be excluded is effective dated. This means that new tasks that are generated after the effective date you specify won't display in My Tasks. After you configure a step to exclude notifications to My Tasks and you:

- Send a step back to the excluded step, the step doesn't display in My Tasks. You can only send a step back from the excluded step by accessing the Business Process Transactions Awaiting Me report because you can't access the step from My Tasks.
- Reassign the step to another person, Workday doesn't display the excluded task in their My Tasks.
- Delegate the task, Workday doesn't display the excluded task in My Tasks of the delegate and the delegator.

The business process administrator can reassign excluded steps by using the:

- Reassign Business Process Step mass operation type on the Mass Operation Management task.
- Business Process > Reassign This Task related action off of an event.
- *Reassign Business Process Step* web service.

You can't use the Reassign Tasks task to reassign excluded steps.

Workday recommends that you don't configure the exclude functionality on tasks that are delegated often.

If you can't access a delegated task after you exclude notifications to My Tasks, the:

- Business process administrator can stop delegation by accessing the Manage Delegation Setting task.
- Delegator can stop delegation using single-task delegation.

Related Information
Concepts
Concept: View Business Process Details on page 949

Example: Set Up Auto-Manage Business Processes Service Step

This example illustrates how to configure the *Auto-Manage Business Processes* service step to take action on business processes.

Context

Betty is a manager, and she's leaving the organization. As part of the termination process, you want Workday to handle business process automatically for:

- Events about Betty that are in progress.
- Steps assigned to Betty to take action.

You want Workday to check all business process steps that Betty needs to act on. For all:

- Business process steps assigned to Betty, you want to remove her as an assignee if there are other people assigned to the same step. When Betty is the only assignee on the step, Workday won't remove her from the step.
- Steps that are part of the *Expense Report Event* business process, you want to reassign steps to the *Finance Administrator* security group.
- Business process types, you want to reassign *Approval* steps to the *Manager's Manager* security group.

You configure the *Auto-Manage Business Processes* service step to:

- Cancel events that are about Betty.
- Reassign tasks that belong to Betty to someone else.
- Remove Betty as an assignee on steps.

Prerequisites

Security: These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*

In the Who Can Do Action Steps in the Business Process section of the business process security policy, add appropriate security groups for action steps such as *Approve*, *Advance*, and *Reassign Tasks*.

Steps

1. Access the Edit Tenant Setup - Business Processes task.

   Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.
2. From the User to Perform Automated Business Process Actions prompt, select *Logan McNeil*.
3. Click OK and Done.
4. From the related actions menu of the *Termination* business process, select Business Process > Edit Definition.
5. For the Effective Date, accept today's date.
6. Click OK.
7. On the business process definition, add these steps:

Order	Type	Specify	Group
e1	*Service*	*Auto-Manage Business Processes*	
f	*Action*	*Manage Business Processes for Worker*	*HR Partner*

8. Click OK.
9. Click Configure Auto-Manage Business Processes on the *Service* step to configure automation rules.
10. For the Effective Date, accept today's date.
11. Click OK.
12. In the Business Processes About the Person grid, add this row:

Business Process	Action	Comment	Suppress Notifications
For all Business Processes	*Cancel*	*Cancel events that are about the person using Auto-Manage Business Processes service step.*	Select the check box.

    For all business process types, you want Workday to cancel all in-progress events that are about Betty.

13. In the Business Process Steps Assigned to the Person grid, add these rows:

Business Process	Step Type	Action	Reassign To	Comment
For all Business Processes		*Remove Person as Assignee*		*Remove terminated person as an assignee using Auto-Manage Business Processes service step.*
Select Include Business Processes and then *Expense Report Event*.		*Reassign to Security Groups*	*Finance Administrator*	*Reassign expense report from terminated person to Finance Administrator using Auto-Manage Business Processes service step.*
For all Business Processes	*Approval*	*Reassign to Security Groups*	*Manager's Manager*	*Reassign step from terminated person to manager's manager using Auto-Manage Business Processes service step.*

14. Click OK and Done.

Result

The *Auto-Manage Business Processes* service step runs a scheduled job in the background every 15 minutes.

Workday evaluates the rules in order for:

- Business processes about Betty.
- Business process steps assigned to Betty.

For each business process or business process step, we evaluate the automation rules in order until a rule is valid. An automation rule is valid if the criteria is met and the action can be taken on the business processes. When the business process meets the criteria but Workday can't take the action, we move to the next rule.

When the termination occurs for Betty, Workday:

- Cancels all of Betty's in-progress events, such as her absence request.
- Reassigns an expense report that's awaiting action from Betty to the *Finance Administrator* security group.
- Reassigns Betty's *Approval* steps to her manager, such as absence requests from her employees.

On the Process History grid of the:

- In-progress events, such as Betty's absence requests, the status is *Canceled*.
- Expense report events, the status is *Reassigned*.
- Approval steps, such as absence requests from Betty's employees, the status is *Reassigned*.

- Auto-managed business processes, Workday displays the configuration comments.

Related Information

Concepts

Setup Considerations: Auto-Manage Business Processes for Worker on page 1028

Concept: Auto-Manage Business Processes for a Worker on page 1063

Tasks

Steps: Set Up Auto-Manage Business Processes Service Step on page 1049

Reference

The Next Level: Auto Manage Business Processes for Worker

Create Checklists

Prerequisites

Create To Dos before grouping them into a checklist.

Security: These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*

Context

You can create a checklist and add it as a *Checklist* step type in a business process. It's a list of To Dos, or external tasks that you can add as steps to business processes.

Steps

1. Access the Create Checklist task.
2. As you complete the task, consider:

Option	Description
To Do	Select a To Do or create a new one.
Due Date	Workday recommends you specify a Due Date when you create your own *Checklist*. A Due Date is a calculated date based on elapsed time, or at the beginning or end of some specified period. Specify whether the due date is calculated from when the *Checklist* step starts or from when this business process instance is to be effective.
Due Date Is Based On Effective Date	Select this check box to calculate the due date based on the effective date of this business process instance.
Security Group	Select the security group that includes the users who must complete the checklist item.

Note: The default time zone is the user's current time zone. You can only enter a time zone if you selected the Business Process Configuration Time Zone option on the Edit Tenant Setup - System task. If you enter a time zone, the changes take effect at midnight on the specified date in the specified time zone. Users in other time zones see the changes at the corresponding date and time in their time zones.

Delegate Business Processes

Setup Considerations: Delegation

You can use this topic to help make decisions when planning your configuration and use of delegating business processes. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Delegation enables users to give another person the ability to initiate business processes on their behalf or take actions on their My Tasks items. Users can set a start and end date to cover a specific period or they can delegate on an ad hoc basis.

Delegation is different from reassigning a task. Reassignment permanently moves responsibility for a task from 1 person to another. Delegation doesn't remove responsibility (ownership) for the task from the original task owner, but rather enables a user to perform tasks on behalf of the original task owner.

Business Benefits

Delegation enables users to share responsibility of their business processes among peers, subordinates, and superiors depending on the tenant configuration. Delegation ensures that tasks don't get held up when a user is unavailable.

Use Cases

- Delegate Business Process Tasks. (Do My Tasks On My Behalf): A manager on vacation can delegate My Tasks items, like PTO request approval, to their manager who can then approve any incoming PTO requests.
- Delegate Business Process Initiation. (Start On My Behalf): A user on a business trip can set a delegation period to have a delegate create expense reports on their behalf while they are out of the office.
- Delegate a single task: A user can delegate a coworker to approve a specific expense report on their behalf.

Questions to Consider

Questions	Considerations
Who do you want users to be able to delegate a task to?	You can configure the Users Can Delegate Tasks To prompt on the Edit Tenant Setup - Business Process task to determine who a user can delegate a task to. The Require End Dates check box applies to My Tasks delegations and not to single-task delegation.
Which My Tasks items do you want to delegate to someone else?	When you delegate all business processes on the Manage Delegations task, the delegate can

Questions	Considerations
	access all My Tasks items that the delegator can take action on in My Tasks. You might not want a delegate to view and access some My Tasks items.
Do you want the delegator to maintain visibility into the tasks they've delegated?	When you enable the Retain Access to Delegated Tasks within My Tasks check box on the Manage Delegations task, you will see the tasks in your My Tasks during the delegation period. When you add a new delegation configuration or update an existing configuration and select the For all Business Processes and For Business Process options, Workday automatically enables the Retain Access to Delegated Tasks within My Tasks check box.
Do you want to enable delegation only for specific business processes?	Consider configuring the security policies of any individual business processes that you want to enable for delegation by selecting the Allow Business Process Delegation check box in the Policy Restrictions section.
Do you want delegates to be able to create reports on behalf of delegators?	Consider that when you delegate the creation of an item, your delegate has access to all of your history for that item. Example: When you delegate the creation of expense reports, your delegate can copy all of your existing expense reports.
Do you want to create, retrieve, and update delegation configurations en masse?	Consider using these web services to streamline business process delegation configuration by eliminating manual entries: • *Get Business Process Delegations* • *Put Business Process Delegation* The web services help your organization save time, reduce errors, and improve operational efficiency by enabling precise and targeted updates to worker delegations.

Recommendations

Workday recommends that you thoroughly test your delegation workflow in a non-production environment before configuring the delegation in your Production environment.

Include:

- A *Review* or *Approval* step on the *Request Delegation Change* business process when you want someone to review delegations before they take effect. Anytime someone configures a delegation for a period of time, the *Request Delegation Change* business process is initiated.
- An *Approval* step on the *Delegate Task* business process when you want someone to review single task delegations before they take effect. Anytime someone delegates a single task from their My Tasks, the *Delegate Task* business process is initiated.

Don't configure the exclude business process steps from My Tasks functionality on tasks that are delegated often.

Avoid assigning a large number of delegations to a single user to prevent performance issues.

Requirements

On the security policy of business processes you want to make available for delegation, you must:

- Enable security groups to delegate the initiating action to others in the Who Can Start the Business Process section.
- Select the Allow Business Process Delegation check box.

The event you want to delegate must be current or in the future.

Limitations

Delegates might not have the same security permissions for secured objects as the delegator. Examples: Report fields and tasks. Workday recommends that you thoroughly test your delegation workflow in a non-production environment before configuring the delegation in your Production environment.

Not all business processes allow delegation. When you delegate a To Do step and an embedded task in a *To Do* step doesn't allow delegation, the task won't appear in the delegate's My Tasks as a To Do.

Tenant delegation settings apply only to users requesting delegation on behalf of themselves. When you enable role-based or user-based security groups to request delegation on behalf of others, these settings don’t apply.

Delegates can request reassignment for any delegated tasks, but they can't delegate any delegated tasks to another worker.

When users delegate single My Tasks items, they can't set when the delegation begins and ends.

Workday prevents a delegated business process from accessing certain Workday functionality that requires connecting to another service, including:

- Background conversions
- Business form printing
- Integrations (including Reports as a Service, REST API, and Workday Studio)
- Scheduled reports
- Access to documents on My Reports
- Solutions

When an *Action*, *Approval*, or *To Do* business process step is configured to be excluded from My Tasks and you delegate the task, the task won't display in the My Tasks of the delegate or the delegator.

If you can't access a delegated task that's been excluded, the:

- Business Process Administrator can stop delegation by accessing the Manage Delegation Setting task.
- Delegator can stop delegation though single task delegation.

Tenant Setup

You can use the Edit Tenant Setup - Business Processes task to:

- Require end dates for delegation. The Require End Dates check box doesn't apply to single task delegation.
- Apply routing restrictions during delegation. When routing restrictions prevent Workday from routing a business process to a delegate, Workday routes the business process to an alternate delegate. Alternate delegates can't initiate a business process on behalf of a delegate. When you enable the Apply Routing Restrictions during Delegation check box and a delegate approves a step, Workday considers the delegate to be a prior approver. The ability to act on a step goes away when it has a routing restriction on a prior approver, even when it's a parallel step to the *Approval* step. The

delegate won't have permission to complete the next step because of the routing restriction on the step, and the delegate is now a prior approver.

If you configure delegation settings with an alternate delegate and you clear the Apply Routing Restrictions during Delegation check box, Workday displays a confirmation page. If you proceed to clear the check box, Workday removes alternate delegates from manage delegation settings. Alternate delegates won't receive delegated items.

If you enable the Apply Routing Restrictions during Delegation check box, the Alternate Delegate field isn't required in the *Put Business Process Delegation* web service.

Security

Configure the *Business Process Delegation* domain in the System functional area.

Business Processes

You can delegate the initiating action on some business processes.

Configure the security policy for the *Request Delegation Change (Default Definition)* business process. If the default definition for this business process doesn't exist in your tenant, you must create it.

Reporting

Reports	Considerations
Business Processes for Delegation	View a list of business processes that are enabled for delegation.
Business Process Tasks Not Delegated	View tasks that Workday doesn't delegate due to routing restrictions.
Current Delegations	View current and active delegations at a glance for organizations you specify. You can select whether to include subordinate organizations and managers in the report results. This report displays the: • Delegating person (the delegator) • Duration of the delegation • Delegate • Affected business processes • Delegation configuration This report doesn't include delegations that have expired. You can use the Delegation Assignments report field in custom reports to view all current or future delegations assigned to a worker. Users with the security permissions, such as implementers, can obtain the reference ID of a specific delegation instance. In the Current Delegations grid, select Delegation > Integration IDs from the related actions menu of the specific delegation instance.
Manage Delegation Settings	View current delegations and past delegations for a worker. You can also view which business processes allow delegation.

Reports	Considerations
	Users with the security permissions, such as implementers, can obtain the reference ID of a specific delegation instance. In the Current Delegations grid, select Delegation > Integration IDs from the related actions menu of the specific delegation instance.
My Delegations	View completed tasks from the delegating user's point of view. Users with the security permissions, such as implementers, can obtain the reference ID of a specific delegation instance. In the Current Delegations grid, select Delegation > Integration IDs from the related actions menu of the specific delegation instance.
View All Delegated Tasks	View a list of delegated tasks that you, as a delegate, can perform based on the original assignment date for the delegating user.
View and Maintain Notifications	View a list of notifications for the delegating user sent during the time that the delegation is in effect.
View More Processes	View a list of delegated business processes and who took action on your behalf.
View My Delegation Assignments	View all the business process *Initiation* steps that others have delegated to you.

Integrations

Web Service	Considerations
Get Business Process Delegations	Enables you to retrieve all delegations that are configured. This includes active and future delegation configurations. By default, we don’t display expired delegations. However, you can include them by setting the Include Expired Delegations flag in the Request Criteria section. You can also filter delegation configuration for specific business processes by specifying the business process types in the Request Criteria section.
Put Business Process Delegation	Enables you to create or update a delegation configuration.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Concepts

Concept: Exclude Business Process Steps from the My Tasks on page 1065

Concept: My Tasks on page 1209

Concept: Delegation Notifications on page 1077

Reference

Reference: Edit Tenant Setup - Business Processes on page 27

Concept: Act On Behalf Of Another User

Workday makes it easy for you to manage and perform delegated tasks.

View Delegated Tasks

You can view your delegated tasks using:

- My Tasks Advanced Search. Select Delegated to Me in the Assignment prompt.
- The View My Delegation Assignments report.

Perform Delegated Tasks

When tasks are delegated to you, you switch accounts to perform the tasks on behalf of another user. Workday displays the Switch Account option in:

- The menu displayed when you click your name or photo in the application header.
- Delegated items in My Tasks.

Selecting Switch Account displays a list of users who have delegated My Tasks items or initiating actions to you. Select the user for whom you want to act as a delegate.

Note: If you start a proxy session as a user that has tasks delegated to them, you won't be able to select Switch Accounts.

After you switch accounts, Workday displays:

- On Behalf of, followed by the name and photo of the delegator at the top of the page.
- The Delegation Dashboard, which includes the Delegated Actions worklet, and from which you can take initiating actions on any business processes that have been delegated to you by the user on whose behalf you are acting.
- My Tasks, which (when selected) contains only the My Tasks items delegated to you by the user on whose behalf you are acting, and from which you can view the details and complete the tasks.

Note: Delegated My Tasks items are displayed in your My Tasks area for your own Workday account as well. The action item titles display On Behalf of, followed by the name of the delegator to indicate that they are delegated tasks. However, you can’t view the details or complete the tasks until you switch accounts. You also can’t view the details of or complete delegated tasks steps, such as those found in the Onboarding business process.

To switch back to your Workday account, select Switch Account again, and select your own name.

Security Considerations

When a delegate performs a task after they Switch Account to act on behalf of the delegator, Workday knows that the delegate is acting on behalf of the delegator and, for the scope of this task, evaluates security for the original owner. Ensure the business process type delegation configuration doesn’t contain additional permissions for the delegation.

Notifications

When tasks are delegated to you, Workday sends you a Workday Delegated Tasks Update notification.

You might not receive this notification immediately after the delegating user submits the delegation request in their tenant. Depending on how Workday is configured and which tasks you’re delegating, the request could first require reviews and approvals. If applicable, Workday sends both the worker and either the delegate or the alternate delegate receives confirmation notifications when the delegations are approved and go into effect.

Excluded Tasks

When you configure an Action, Approval, or To Do step to exclude My Tasks notifications and you delegate the task, the:

- Delegate and delegator won't be able to access the excluded task from My Tasks.
- Task won't display in My Tasks when the delegate switches account to act as the delegator.
- Delegate won't be able to run the Business Process Transactions Awaiting Me report as the delegator.

Workday recommends that you don't configure the exclude functionality on tasks that are delegated often.

Related Information

Concepts

Concept: Delegate Initiation of Business Processes on page 1086

Concept: Exclude Business Process Steps from the My Tasks on page 1065

Concept: Delegation Routing Restrictions

Routing restrictions enable you to configure business process steps so that Workday excludes specified individuals from the workflow routing based on your selections.

Note: You can't reroute *Initiation* business process steps.

When you enable the Apply Routing Restrictions during Delegation check box on the Edit Tenant Setup - Business Processes task and a delegate approves a step, Workday considers the delegate to be a prior approver. The ability to act on a step goes away when the step has a routing restriction on a prior approver, even when it's a parallel step to the *Approval* step.

Example: A business process definition contains:

- Step a: *Initiation*
- Step b: *Approval* (a parallel step 1)
- Step b: *To Do* (a parallel step 2)

Both b steps have routing restrictions to exclude prior approvers. The Apply Routing Restrictions during Delegation check box is enabled on the Edit Tenant Setup - Business Processes task. Once the delegate approves the Approval step, the delegate won't be able to complete the*To Do* step and won't see the task in their My Tasks. The*To Do* step has a routing restriction that prevents prior approvers from acting on the step.

Alternate Delegates

When routing restrictions prevent Workday from routing a business process to a delegate, and if routing restrictions during delegation are applied at the tenant level, Workday routes the business process to an Alternate Delegate that you select when managing delegations.

Note: An alternate delegate can’t initiate a business process on behalf of a delegate.

During delegation configuration, you can choose to Use Default Alternate (Workday automatically assigns the delegate’s primary manager as the Alternate Delegate), or select a specific or multiple alternate delegates. A delegating manager can’t select themselves as an alternate delegate for their direct reports.

Business process administrators can use the Business Process Tasks Not Delegated report to view all tasks for which both the delegate and the alternate delegate are excluded based on routing restrictions.

Concept: Delegation Rules

A delegation rule is a condition rule that you can apply to the business processes you're delegating. Delegation rules enable you to further restrict which business processes or tasks are delegated.

Example: You want to prevent a delegate from approving an expense report that exceeds 1,000 USD because an expense that large might require further consideration so you create a delegation rule that restricts approval permission to 999 USD and under.

In this example, when a user delegates their My Tasks actions and 1 of the delegator's team members submits an expense report totaling 1,200 USD, Workday doesn't delegate the approval task. Instead, the task is routed to the original security group configured on the business process.

You can create condition rules for delegation on the business process definition. These rules display as options on the Delegation Rule prompt when you select For all Business Processes or specific business processes on these tasks:

- Manage Delegation
- Request Delegation Change

You can only use delegation condition rules in a delegation configuration. You won't be able to use a delegation rule in a custom notification for a business process.

Concept: Delegation Notifications

Delegation notifications for the delegate, delegator, and (where applicable) the approver depend on your tenant setup and delegation configuration.

Delegate Notifications

When tasks are delegated to you, Workday sends you a Workday Delegated Tasks Update notification.

Example: Betty receives a Workday Delegated Tasks Update notification that lists the delegating user (Stephen), the task (Review Certifications), and the business process (*Manage Certifications*). It's also a new pending task in Betty's My Tasks. From here, she can switch accounts to act on Stephen's behalf and take action on it.

You might not receive a Workday Delegated Tasks Update notification immediately after the delegator submits the delegation request in their tenant. Depending on how Workday is configured and the delegated tasks, the delegation request could first require reviews and approvals. In this case, Workday sends confirmation notifications to the delegator, the delegate, and, if applicable, the alternate delegate when the delegations are approved and go into effect.

Delegator Notifications

After delegating a single task, you no longer receive notifications about it and it's removed from your My Tasks. However, you can view your incomplete delegated tasks in Manage Delegations > Current Task Delegations, and completed tasks in the Delegated Tasks tab.

When you delegate a specific business process and choose to Retain Access to Delegated Tasks within My Tasks on the Manage Delegations task, you continue to receive notifications on the delegated tasks and can take action on them if needed. This is useful for workers who delegate tasks for a leave of absence, but still plan to monitor or perform some of those tasks for that period.

If a delegation request needs approval before going into effect, both you and the delegate receive a Workday Delegated Tasks Update notification when the request is approved. If the approver denies the delegation, delegators don't receive a notification. However, you can access the My Delegations task to view the delegation status on the Delegation History tab.

Related Information

Tasks

Reassign Tasks on page 1053

Single Task Delegation

Concept: Single Task Delegation

Single task delegation temporarily reassigns a single task to another user on an ad hoc basis, enabling another user to perform an individual action on your behalf. Delegation differs from reassignment because it doesn't remove responsibility (ownership) for the task from the user it was initially assigned to. Tasks are performed on the delegator's behalf and this is indicated in notifications about the task.

Example: Manager A delegates 1 specific expense report to Manager B because Manager B has more context about what the expense should cover. If approved, the user who submitted the expense report receives a notification that Manager B approved it on Manager A's behalf.

When you select a delegate, they are restricted to the:

- Task you delegate to them.
- Limits of your own access privileges. Example: The delegate can't send a task back if you don't have permission to do that yourself.

Depending on your security permissions and tenant setup, you can delegate a single task by either:

- Selecting Delegate Task from the related actions menu of a My Tasks item.
- Accessing the Delegate Task task directly. This task is accessible to business process administrators Configure the *Delegate Task* business process and security policy in the System functional area.

Tenant-level delegation settings that you configure on the Edit Tenant Setup - Business Process task determine which types of users can serve as a delegate, such as:

- *Anyone*
- *Peers*
- *Subordinates*
- *Superiors*

Enable Single Task Delegations

Prerequisites

Security:*Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Context

You can enable users to delegate a single task to another user at their own discretion or you can require that the delegation request is reviewed before taking effect.

Steps

1. Access the Edit Tenant Setup - Business Processes task.

   Select at least 1 option in the Users Can Delegate Tasks To prompt.

   Note: Tenant delegation settings apply only to users requesting delegation on behalf of themselves and not to role-based or user-based security groups who request delegation on behalf of others.
2. From the related actions menu of a business process you want to enable for delegation, select Business Process Policy > Edit.

   In the Policy Restrictions section, select the Allow Business Process Delegation check box.
3. (Optional) Require approval for single task delegations before they take effect.

   When a user delegates a single task from their My Tasks, Workday initiates the *Delegate Task* business process. Configure the *Delegate Task (Default Definition)* business process to include an *Approval* step on the business process definition.

Result

Example

Next Steps

Example: Delegate a Single Task

This example illustrates how you can delegate a single task to another worker.

Context

A worker who reports to Taylor submits an expense report and is awaiting Taylor's approval in their My Tasks. This is a time-sensitive item and requires thorough review, but Taylor is on leave for the next week. To ensure the expense report is approved in a timely manner, Taylor decides to delegate this task to Katie Smith, another manager in their department.

Prerequisites

The business process administrator must:

- Set the Users Can Delegate Tasks To prompt on the Edit Tenant Setup - Business Processes task to at least 1 of the below options:
    - *Anyone*
    - *Peers*
- Select the Allow Business Process Delegation check box on the business process security policy of the expense report.

Steps

1. Access My Tasks.
2. On the expense report approval task, click the gear icon and select Delegate Task.
3. From the Proposed Delegates prompt, select Katie Smith.
4. Click Submit to confirm the delegation.

Result

The delegated task is awaiting approval in Katie's My Tasks. Workday prompts Katie to switch Workday accounts to take action on Taylor's behalf. After switching accounts, Katie can view the task details and the available actions, but not the details of any other items in Taylor's My Tasks. When the task is complete, Katie can switch back to their own account.

Next Steps

View the status and other details of the delegated task by accessing My Delegations > Delegated Tasks.

Business Process Task Delegation

Concept: Business Process Task Delegation

Delegating all or specific business process tasks *temporarily* reassigns the tasks to another user for a specified period of time. This enables the delegate to perform actions on your behalf. Example: A manager is going on leave for a week and, in My Tasks, delegates time sensitive business processes to another manager for the period of time that they are away.

The delegate is restricted to the tasks that are specified on the Current Delegations report for each delegated business process type. The delegate can only take actions within the limits of the delegator's access privileges on the business process.

Note: Delegation differs from reassignment because it doesn't remove responsibility (ownership) for the task from the user it was initially assigned to.

Typically, both business process administrators and workers themselves (depending on your tenant setup) can delegate all or specific business process tasks. Business process administrators can manage and view a worker's delegated tasks using the Manage Delegations Settings report. Workers can manage their own delegations by accessing the My Delegations report.

Once the delegation request is complete, (and, if applicable, approved), all associated tasks are routed to the delegate's My Tasks, and when you enable email notifications, Workday sends the delegate an email when there are tasks awaiting action.

Tenant-level delegation settings that you configure on the Edit Tenant Setup - Business Process task determine which types of users can serve as a delegate, such as:

- *Anyone*
- *Peers*
- *Subordinates*
- *Superiors*

For information about business process routing restrictions and alternate delegates, see Concept: Delegation Routing Restrictions.

A business process administrator can use the *Put Business Process Delegation* and *Get Business Process Delegations* web services to:

- Add new delegation configurations without changing or overwriting existing delegations.
- Update existing delegation configurations in the *Put Business Process Delegation* request without impacting other delegations.
- Remove existing delegation configurations in the *Put Business Process Delegation* request without impacting other delegations.

Related Information

Concepts

Concept: Delegate Initiation of Business Processes on page 1086

Tasks

Delegate My Tasks on page 1082

Reassign Tasks on page 1053

Reference

Reference: Edit Tenant Setup - Business Processes on page 27

Enable Business Process Task Delegations

Prerequisites

Security: *Set Up: Tenant Setup - BP and Notifications*domain in the System functional area.

Context

You can configure tenant-level delegation settings that apply to users requesting delegation on behalf of themselves. When you enable role-based or user-based security groups to request delegation on behalf of others, these settings don't apply.

Steps

1. Access the Edit Tenant Setup - Business Processes task.

2. As you complete the task, consider:

Option	Description
Users Can Delegate Tasks To	Select at least 1 option. When managing delegations as a business process administrator or worker, Workday restricts the available delegates depending on this setting. Example: When Subordinates is selected in the Users Can Delegate Tasks To prompt, only subordinates within your supervisory organization are available in the Delegate prompt on the Manage Delegations task. You can drill down on the organization hierarchy when selecting a subordinate. The same delegates are available in the Delegate prompt whether you are delegating your own tasks or delegating a worker's tasks.
Require End Dates	Applies to My Tasks delegations and not to single-task delegation.
Apply Routing Restrictions During Delegation	When you select this check box and a delegate approves a step, Workday considers the delegate to be a prior approver. The ability to act on a step goes away when the step has a routing restriction on a prior approver, even when it's a parallel step to the *Approval* step. If you enable the check box, the Alternate Delegate field isn't required in the *Put Business Process Delegation* web service.

3. From the related actions menu of a business process you want to enable for delegation, select Business Process Policy > Edit.
4. As you complete the task, consider:

Option	Description
Allow Business Process Delegation	In the Policy Restrictions section, select the Allow Business Process Delegation check box to enable delegation of all or specific business process tasks.
Who Can Start the Business Process	(For delegating the initiating actions of a business process only) Specify which security groups can delegate the initiating actions in the Security Groups who can delegate this action to others prompt. You can only do this when the business process definition enables you to delegate initiating actions.

5. (Optional) Require review or approval of business process delegations before they take effect.

   Configure the *Request Delegation Change* business process definition to include a *Review* or *Approval* step on the business process definition. when you want someone to review delegations before they take effect. When a user configures a delegation for a period of time, Workday initiates the *Request Delegation Change* business process.

Result

Example

Next Steps

Delegate My Tasks

Prerequisites

Configure delegation routing restrictions and the users to whom tasks can be delegated in your tenant.

Enable business process delegation on the business process security policy.

Configure the *Request Delegation Change* business process security policy.

Security: *Business Process Delegation* domain in the System functional area.

Context

You can delegate all or specific items assigned to you in My Tasks to another user. You can customize the delegation to meet your needs by specifying the period of time in which you want to delegate items, identifying alternative delegates, and more.

As a business process administrator, you can delegate all or specific business process tasks on behalf of a worker.

The users that are available for delegation depend on the configuration of the Users Can Delegate Tasks To field on the Edit Tenant Setup - Business Process task.

Steps

1. As business process administrator delegating a worker's tasks:
    - Access the Manage Delegation Settings report.
    - Select a worker for whom you want to delegate a task for.
    - Click Request Delegation Change.

    If you're delegating your own tasks:

    - From My Tasks, select Manage Delegations > Manage Delegations.
2. As you complete the task, consider:

Option	Description
Begin Date / End Date	Specify a Begin Date and an End Date for the delegation, if the tenant is configured to require end dates on the Edit Tenant Setup - Business Process task. To delegate for a single day, enter the same Begin Date and End Date. Example: Delegation begins at 12:00:01 AM on the Begin Date and ends at 11:59:59 PM on the End Date. Note: Delegation begins and ends according to the time zone of the delegator. Example: When the delegator and the delegate are both in Central Europe, delegation begins and ends at the specified times in Central

Option	Description
	European Time. However, when the delegator is in San Francisco, and the delegate is in Central Europe, delegation begins at 9:00:01 AM on the Begin Date and ends at 8:59:59 AM on the day following the End Date in Central European Time.
Use Default Alternate	Only displays when you select the Apply Routing Restrictions during Delegation check box on the Edit Tenant Setup – Business Processes task. When you select the Use Default Alternate check box (selected by default), Workday populates the Alternate Delegate field with the primary manager of the specified delegate. This occurs only on the first delegation configuration in the Request Delegation Change grid. If you configure multiple rows on this task, the Use Default Alternate check box is unchecked on subsequent rows and Alternate Delegate is blank by default. Note: If you select multiple delegates in the Delegate prompt, the Alternate Delegate field populates with their primary managers in sequential order. Example: Delegate 1's manager is listed first in the Alternate Delegate field, followed by Delegate 2's manager, and so on.
Alternate Delegate	Only displays when you select the Apply Routing Restrictions during Delegation check box on the Edit Tenant Setup – Business Processes task. If the Use Default Alternate check box isn't selected, specify an alternate delegate from this prompt.
Start On My Behalf	Leave blank. This option is only used when you're delegating the initiating action of a business process, not when you're delegating My Task items.
Do My Tasks On My Behalf	Select whether to delegate My Tasks items for all or specific business processes. When you select None of the above, Workday removes the delegate's ability to do My Tasks items, while retaining their ability to initiate specific business processes on the worker's behalf.
Retain Access to Delegated Tasks within My Tasks	Clear this check box when you don't want the delegator to get notifications or be able to access the tasks from their own My Tasks as usual.

Option	Description
	Select the check box for the delegator to retain access and enable either the delegator or the delegate to complete each task. When you add a new delegation configuration or update an existing configuration and select the For all Business Processes and For Business Process options, Workday automatically enables the Retain Access to Delegated Tasks within My Tasks check box.
Delegation Rule	Apply a delegation rule to the business processes you're delegating. When you select For all Business Processes or specific business processes, configured delegation rules that are applicable to the business processes display in the Delegation Rule prompt.
Attachments	(Optional) Business process administrators can attach any supporting files, such as an email message accompanying the requested delegation change, to be included as part of the business process event. You can: • Drag and drop files into the Attachments section of the business process toolbar. • Use the Attachments icon to select one or more files to attach to the business process event. Workers can view attached files associated with the event in the Attachments column on the Delegation History tab of the My Delegations report.

3. To stop a delegation as a business process administrator, access Manage Delegation Settings > Request Delegation Change. Then select Stop Current Delegations and Submit.

   Note: For a delegation that requires approval, Stop Current Delegations is available only after the delegation is approved.

   If there are multiple rows configured, you can remove the row associated with the delegation from the grid, and then click Submit.

Result

Delegations might require reviews and approvals depending on how Workday is configured and which tasks you’re delegating. Workday sends the worker and either the delegate or the alternate delegate a confirmation notification when the delegations go into effect.

For the duration of the delegation, either the delegate or the alternate delegate receives any tasks that would have been directed to the delegator for allowed business processes, as well as any related process notifications, including alerts. Delegates can also request reassignment for any delegated tasks, but they can’t delegate any delegated tasks to another worker.

Next Steps

You can view your delegation history on the Delegation History tab when you access the My Delegations report.

Business process administrators can view a worker's delegation history on the Delegation History tab on the Manage Delegation Settings report. Click each link to see details of their past delegations.

Business process administrators can access the Business Process Tasks Not Delegated report to view all tasks for which both the delegate and the alternate delegate are excluded based on routing restrictions.

Related Information

Concepts

Concept: Delegate Initiation of Business Processes on page 1086

Concept: Exclude Business Process Steps from the My Tasks on page 1065

Concept: My Tasks

Tasks

Steps: Enable Attachments on an Individual Business Process on page 1051

Example: Delegate Specific Business Processes

This example illustrates how you can delegate a specific business process to another worker for a specified period of time.

Context

You're a manager going on leave for the first 2 weeks of May. You want to ensure any expense reports your team submits during those 2 weeks are approved in a timely manner. You want to delegate the Expense Report Event business process to another manager, Jenna, for the 2 weeks you're on leave.

You know Jenna might have to take a couple of days off while you're on leave so you also want to ensure that tasks are routed to Jenna's manager, Steve Morgan, if Jenna is unavailable.

Lastly, you want to ensure you maintain visibility into the tasks that Jenna or Steve might have to complete on your behalf.

Prerequisites

The business process administrator must:

- Select at least 1 of these options from the Users Can Delegate Tasks To prompt on the Edit Tenant Setup - Business Processes task:
  - *Anyone*
  - *Peers*
- Select the Apply Routing Restrictions during Delegation check box on the Edit Tenant Setup - Business Processes task.
- Enable business process delegation in the Policy Restrictions section of the security policy for the *Expense Report Event* business process.
- Configure the *Request Delegation Change (Default Definition)* business process and security policy in the System functional area.

Steps

1. Access Manage Delegations > Manage Delegations from My Tasks.
2. Enter these values:

Option	Value
Begin Date	*05/01/2024*

Option	Value
End Date	*05/14/2024*
Delegate	*Jenna Smith*
Use Default Alternate	Ensure this check box is selected. Jenna's manager, Steve Morgan, should be the default Alternate Delegate.
Start On My Behalf	Leave blank.
Do My Tasks On My Behalf	Select *Expense Report Event* from the For Business Process prompt.
Retain Access to Delegated Tasks within My Tasks	Enable the check box.
Delegation Rule	Leave blank.

3. Click Submit to confirm the delegation.
4. To ensure that the business process is routed to Jenna's manager, Steve, when Jenna goes on leave, configure the *Expense Report Event* business process definition:
    - Select Expense Report Event > Maintain Advanced Routing from the related actions menu of the*Approval*business process step for Jenna's manager, Steve.
    - Select the Exclude Initiator and Exclude Prior Approvers check boxes.

Result

Jenna can now access and perform your *Assign Work Schedule* business process tasks for the first 2 weeks of May.

Jenna, the delegate, goes on leave for 2 days during the delegation period. The routing restrictions applied as part of the business process definition (step 4) exclude initiators and prior approvers. As Jenna approved the step prior to the *Approval* step (*Review Expense Report*), she is considered a prior approver. This excludes her from acting on the *Approval* step, which is instead routed to her manager, Steve.

You can view what tasks came in while you were on leave in your My Tasks.

Business Process Initiation Delegation

Concept: Delegate Initiation of Business Processes

Workday enables you to delegate the initiating action of certain business processes. Example: A manager can give an administrative assistant the ability to run the Create Expense Report task on their behalf

Canceling Initiated Business Processes

A delegate can't cancel a business process they initiated, even when the Initiator security group has Cancel permissions on the business process security policy. Canceling a business process event after it has been processed falls outside the scope of what is delegated.

Security Considerations

The ability to delegate the initiating action for the eligible business processes is controlled by the business process security policy. Before you select the business process in the Start on My Behalf prompt on the Request Delegation Change task, make sure you configure the business process security policy. In the:

- Who Can Start the Business Process section, select the security groups in the Security Groups who can delegate this action to others prompt. This prompt is only available for business processes that allow the delegation of the initiating action.

- Policy Restrictions section, select the Allow Business Process Delegation check box.

When you delegate the creation of an item, your delegate has access to all of your history for that item. Example: When you delegate the creation of expense reports, your delegate can copy all of your existing expense reports.

When the delegate performs the task after they Switch Account to act on behalf of the delegator, Workday knows that the current user is acting as a delegate and, for the scope of this task, the security is evaluated for the original owner. The business process type delegation configuration might have specified additional permissions for the delegation.

Related Information
Concepts
Concept: Act On Behalf Of Another User on page 1075

Delegate Business Process Initiating Actions

Prerequisites

Configure delegation routing restrictions and the users to whom tasks can be delegated in your tenant.

Enable business process delegation on the business process security policy.

Configure the *Request Delegation Change* business process security policy.

Security: *Business Process Delegation* domain in the System functional area.

Context

You can delegate the initiating action of certain business processes. The delegate can be any user who is part of the security groups specified in the Who Can Start the Business Process section on the business process security policy.

Note: Delegation differs from reassignment because it doesn't remove responsibility (ownership) for the task from the user it was initially assigned to.

Steps

1. Access the Manage Delegations task using one of the following methods:
    - In My Tasks, click Manage Delegations.
    - Access My Delegations and click Manage Delegations.

    Business process administrators can access the Manage Delegation Settings report and click Request Delegation Change to delegate on a worker's behalf.
2. As you complete the task, consider:

Option	Description
Begin Date / End Date	Specify a Begin Date and an End Date, if the tenant is configured to require end dates. Example: Delegation begins at 12:00:01 AM on the Begin Date and ends at 11:59:59 PM on the End Date. To delegate for a single day, enter the same Begin Date and End Date. Note: Delegation begins and ends according to the time zone of the delegator. Example: if the delegator and the delegate are both in Central Europe, delegation will begin and end at the specified times in Central European Time. However, if the delegator is in San

Option	Description
	Francisco, and the delegate is in Central Europe, delegation will begin at 9:00:01 AM on the Begin Date and end at 8:59:59 AM on the day following the End Date in Central European Time.
Use Default Alternate	Note: The Use Default Alternate check box is only visible if you select the Apply Routing Restrictions during Delegation check box on the Edit Tenant Setup – Business Processes task. (Optional) Select the Use Default Alternate check box (selected by default). Workday populates the Alternate Delegate field with the primary manager of each delegate, and automatically adds the primary manager of each new delegate that you add.
Alternate Delegate	If the Use Default Alternate check box isn't selected, you can specify one from this prompt.

3. Select the business process that you want the delegate to initiate on your behalf using the Start On My Behalf prompt.
4. As you complete the rest of the task, consider:

Option	Description
Do My Tasks On My Behalf	Select whether to delegate My Tasks items: • *For all Business Processes* • *For a specific Business Process* • *None of the above* (removes the delegate's ability to do My Tasks items, while retaining their ability to initiate specific business processes on the worker's behalf).
Retain Access to Delegated Tasks within My Tasks	(Optional) Clear this check box if you don't want the user to get notifications and access the tasks from their own My Tasks as usual. If you select the check box to retain access, then either the user or the delegate can complete each task. Note: When you select the For all Business Processes or For Business Process options for a new delegation configuration, Workday enables the Retain Access to Delegated Tasks within My Tasks check box by default. For existing delegation settings that don't have the Retain Access to Delegated Tasks within My Tasks check box selected, Workday enables the check box when you update the row to select the For all Business Processes or For Business Process options.
Delegation Rule	(Optional) You can apply a Delegation Rule to the business processes you're delegating.

Option	Description
	When you select For all Business Processes or specific business processes, configured delegation rules that are applicable to the business processes display in the Delegation Rule prompt. See Concept: Delegation Rules.
Attachments	(Optional) Business process administrators can attach any supporting files, such as an email message accompanying the requested delegation change, to be included as part of the business process event. You can: • Drag and drop files into the Attachments section of the business process toolbar. • Use the Attachments icon to select one or more files to attach to the business process event. Workers can view attached files associated with the event in the Attachments column on the Delegation History tab of the My Delegations report.

5. To add more delegations, add a row to the delegations grid by clicking the + icon, and then repeat steps 3 through 10. When you finish setting up your delegations, click Submit.

   To stop a delegation, remove the row associated with the delegation from the grid, and then click Submit.

Result

Delegations might require reviews and approvals depending on how Workday is configured and which tasks you're delegating. Both the worker and either the delegate or the alternate delegate receives confirmation notifications when the delegations go into effect.

For the duration of the delegation, the delegate receives any tasks that would have been directed to the original worker for allowed business processes, as well as any related process notifications, including alerts. Delegates can also request reassignment for any delegated tasks, but they can't delegate any delegated tasks to another worker. Example: When a business process is sent back to the *Initiation* step and awaiting the delegate to take action, the delegate can reassign the *Initiation* task in their My Tasks to another worker.

When the delegate performs the task after they Switch Account to act on behalf of the delegator, Workday knows that the current user is acting as a delegate and, for the scope of this task, the security is evaluated for the original owner. The business process type delegation configuration might have specified additional permissions for the delegation.

When you delegate the creation of an item, your delegate has access to all of your history for that item. Example: When you delegate the creation of expense reports, your delegate can copy all of your existing expense reports.

Example

Next Steps

You can view your delegation history on the Delegation History tab when you access the My Delegations report.

Example: Delegate Initiation of a Business Process

This example illustrates how you can delegate the initiation of a business process to another worker.

Context

A manager is on leave and wants to enable their administrative assistant to run the Create Expense Report task to create and submit an expense report on their behalf.

Prerequisites

The business process administrator must:

- Set the Users Can Delegate Tasks To prompt on the Edit Tenant Setup - Business Processes task to at least 1 of the below options:
    - *Anyone*
    - *Peers*
- Select the Allow Business Process Delegation check box on the expense report's business process security policy.
- Select Business Process Policy > Edit from the related actions menu of the applicable business process and enable security groups to delegate the initiating action to others in the Who Can Start the Business Process section.
- Configure the *Request Delegation Change (Default Definition)* business process and security policy in the System functional area.

Steps

1. As the manager, access the Manage Delegation Settings report and enter your name in the Worker prompt.
2. Click Request Delegation Change.
3. Select begin and end dates for delegation (based on the time zone of the delegator).
4. Enter the name of the administrative assistant as the Delegate.
5. In the Start On My Behalf field, enter the Create Expense Report task as the initiating action the assistant can perform.
6. Specify whether you want this task to be accessible on all business processes, specific ones, or none.
7. Click Submit to confirm the delegation.

Result

The delegated worker can now access the Create Expense Report task for the duration of the specified date range. They can create and submit the manager's expense report on their behalf using this task.

Reference: Delegation Reports

Workday delivers reports that give you greater insight into the planning and use of business process delegation.

You can access these reports to view additional delegation details:

Report	Description
Business Process Transactions Awaiting Me	Displays all business process steps that are awaiting your action.
Current Delegations	Displays current and active delegations at a glance for organizations you specify. You

Report	Description
	can select whether to include subordinate organizations and managers in the report results. This report displays the: • Delegating person (the delegator). • Duration of the delegation. • Delegate. • Affected business processes. • Delegation configuration. This report doesn't include delegations that have expired. Note: You can use the Delegation Assignments report field in custom reports to view all current or future delegations assigned to a worker.
My Delegations	Displays completed tasks from the delegating user's point of view.
View All Delegated Tasks	Displays a list of all delegated tasks that you can perform based on the original assignment date.
View and Maintain Notifications	Displays the notifications for the delegating user sent during the time that the delegation is in effect.
View My Delegation Assignments	Displays all the business process initiation steps which others have delegated to you.

Business Process Notifications

Create Custom Notifications

Prerequisites

Select a language and locale for your tenant.

Security: These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*

Context

You can create custom notifications that trigger on any business process step, or on the status of the business process as a whole. You can also delay when a notification is sent.

For any business process definition, you can configure custom business process notifications to use a different sent From email address in the notification.

For audit reporting, you can tag instances of business processes. This process enables you to track and report on business process configuration changes in your tenant. Example: Creating custom notifications on a business process definition. In the Audit Trail Report, Workday might display more than 1 audit trail entry when you add, edit, or remove a custom notification.

The maximum size of an email notification is 20 MB. When you exceed this size, the notification doesn’t process and you don’t see an error message.

Steps

1. From the related actions menu of a business process definition, select Business Process > Add Notification.
2. As you complete the task, consider:

Option	Description
Override Email Template	You can only associate 1 email template with each custom notification. Use the Maintain Email Templates task to designate which email template is the Default and which templates are Active. If you use Notification Designer, you can create a notification template and enable it for the Custom Business Process notification category. You can then select the notification template in the Override Email Template prompt. Custom notifications are sent using the selected Notification Designer template.
Do Not Include Notification Details Link	Select this option if the notification recipients don't have Workday accounts. If you configure an SMS notification, Workday won't include the Notification Details Link in the SMS message regardless of if you select the check box.
Triggers	Specify if the notification is triggered by the status of the business process as a whole, or when the business process enters or exits the step you specify. For recruiting business processes only, you can configure notifications to trigger based on disposition reasons when you select On Disposition and a reason. Example: A recruiter declines the job application of a candidate. A custom notification is sent to the candidate with the disposition reason. When a step is configured with a custom notification and a user skips the step without completing it, Workday sends the notification and displays it on the Notifications page. When there's a subprocess with a custom notification configured on exit of the *Initiation* step of the subprocess, the custom notification won't trigger until the completion of the subprocess. Workday recommends that you configure the notification on the entry step of the next step in the subprocess. When a business process definition contains a shared participation step, you can specify a notification trigger using On Shared Participation Step. When you select this option, you must also select the Trigger on Participant State for the notification. Routing modifiers aren't respected in custom notifications. However, system notifications do respect line level routing.
Conditions and Rules	Notification triggers include the trigger specification and the rules and conditions you specify. Both triggers must be met before Workday sends the notification.
Delay Notification	You can delay when a custom notification is sent to recipients. In the Delay Notification section, configure what the delay is based on and the amount of time to wait before sending the notification. You can configure a delay based on a:

Option	Description
	• Trigger Moment. The moment the notification trigger occurs. (This is what's selected in the Triggers section.) Example: A notification is sent On Exit of step *c*. • Field. A report field. Example: Offer Date. In the Delay By section, select the amount of time for the delay in the Calculated Date prompt. A 1-day delay occurs at midnight of the next day. If you don't select an option in the Calculated Date prompt, the notification delay won't occur. When you base the notification delay on a report field, and that field is blank, Workday evaluates the delay and sends the notification based on the current date. Example: You configure a custom notification to delay by 2 days based on a hire date. Workday triggers the notification on Monday but there's no hire date, so we send the notification on Wednesday.
Repeat On	Select a related instance for which you want to generate separate notifications. In the Email Message Content and SMS Message Content sections, you can include text and content from external fields in the notification. Since custom notifications are about the event by default, the Repeat On field enables you to change the context of external fields configured in the notification by taking the event and retrieving related instances. If you don't configure the Repeat On field, the context of the external fields remains the event. If you configure the Repeat On field and there are a set of instances for the external field, Workday generates separate custom notifications for each instance of that external field. Example: You select Workflow Steps Completed from the Repeat On field. This takes the event and can return a set of workflow steps. Workday generates 1 notification for each returned step, or no notification if there are no returned steps.
Recipients	Select who receives the custom business process notification by configuring 1 of these prompts: • Recipients: Select a report field the recipients are associated with. When we send notifications and the report field isn't valid, we display not available instead of the report field value in the notification. Example: The recipient doesn't have security access. • Groups: Select the security role related to the event.
Email Option	You can use the Mass Update Email Address Option on Notifications task to change the Email Option for all custom notifications defined for business process types. Workday provides 6 options: • *Default*: If the notification is Worker-based, Workday uses the worker's work email address if available. If no work email address is configured, Workday uses the worker's home email address. If the notification is business-based, Workday uses the business email address. • *First Institutional, then Default* (available only for Student business processes): Workday uses the institutional email address for the

Option	Description
	recipient. If no institutional email addresses are configured, then Workday uses the *Default* notification option. • *First Work, then Home*: Workday uses the work email address for the recipient if available. If no work email address is configured, Workday uses the home email address of the recipient. • *Home Only*: Workday uses the home email address of the recipient. • *Institutional Only* (available only for Student business processes): Workday uses the institutional email address for the recipient. • *Work Only*: Workday uses the work email address of the recipient. Workday doesn't send custom business process notifications to disabled accounts. Example: A terminated user. Note: Workday recommends selecting the *Work Only* option to avoid sending emails to home email addresses.
Email Addresses	Workday sends the notification to the email addresses you enter. You can use the Edit Tenant Setup - Notifications task to verify configuration for email notifications for custom business processes.

3. (Optional) Configure email settings for the notification in the Override Email Settings section.

    - Email Configuration prompt: Select a Customer SMTP configuration override to use for the custom business process notification. Workday displays the From Address that you specify there as the sent From email address in the notification. Workday displays available Customer SMTP configuration in your tenant as options in the Email Configuration prompt. If you don't have other Customer SMTP configuration in your tenant, Workday won't display values in the Email Configuration prompt. When you don’t select an email configuration override, Workday displays the From Address that you specify in the Default SMTP Configuration on the Edit Tenant Setup – Notifications task as the sent From email address. You can access the Create Email Configuration task to create a different Customer SMTP configuration to use on a custom business process notification.

      Workday uses the Default SMTP Email Configuration on the Edit Tenant Setup – Notifications task when the From Address in the Customer SMTP configuration override fails. Example: The email address is spelled incorrectly.
    - Reply to Email Address field: Enter an email address that the recipient replies to. Workday sends the response to this email address when users reply to a notification. This address overrides the Reply To email address in the notification SMTP configuration.
4. (Optional) Configure the subject and body of the email in the Email Message Content section. In the Subject and Body grids, you can select these options:

    - Text: Enter content for the subject line of the email or the body of the email.
    - External Field: Select a report field to use for the subject or the body of the email. Similar to creating a report, you can use report fields in an email that returns specific information or data for the business process and that's specific to the recipient.

    In the Subject and Body grids, you can use a combination of both text and report fields to build your email notification. Example: You want to send an email notification to a person only when their time-off request is in Denied status. On the *Request Time Off* business process, you configure the Email Message Content. In the Subject grid, you add:

- Row 1: Text and enter *Your*.
- Row 2: External Field and the Business Process Type report field.
- Row 3: Text and enter *is*.
- Row 4: External Field and the Status report field.

In the Body grid, you select Text and enter *Please contact your manager*.

When the recipient receives the custom notification, Workday displays the email:

- Subject as: *Your Request Time Off is Denied.*
- Body as: *Please contact your manager.*

You can access the Report Fields report to view details about a report field such as:

- Business object name.
- Field description.
- Field type.

5. (Optional) Configure SMS message content to send custom business process notifications through the Workday Messaging delivery channel.

   Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

   When you copy a business process definition that has SMS message content configuration, Workday also copies the SMS message configuration.
6. (Optional) Add attachments to the notification.

   You can add email attachments only when:

   - You select Allow Attachments within Emails on the business process security policy.
   - Email attachments are enabled for the tenant.

   Workday doesn't scan email attachments for viruses.
7. (Optional) Click Preview to send a sample of the configured notification to your My Tasks.

   The sample notification contains field names, not values. Workday sends this notification using the routing rule for the *Business Process General Notifications* notification type that you configure on the Business Process section on the Edit Tenant Setup - Notifications task.

Example

When you use an *Approval Chain* step type and select *Manager* as the security Group for that step, you can also create a custom notification for the step. Workday recommends that you select *Awaiting Persons* as the Recipient in the notification definition. If you select *Manager* as the Recipient, then a notification is sent to the manager of an employee for every approval chain level. If you select *Awaiting Persons* instead of *Manager*, you force the notification to move up the approval chain.

Next Steps

Optionally, use the Configure Content of Business Process System Notifications task to customize the subject and the first line of the body of system notifications generated from business processes. You can configure notifications resulting from a Send Back action differently.

To disable system or custom notifications, access the Notifications tab on the business process definition and click:

- Maintain System Notifications. You can disable system notifications for steps on subprocesses by disabling the related system notification on the initiation step of the subprocess. When you select the Disabled check box, Workday won't send the notification through configured notification channels such as email. However, we still generate the notification for the task and send it to the Workday My

Tasks. Example: You disable the system notification for an *Approval* step. Workday doesn't send an email to the approver, but the approver receives the task in their My Tasks to complete.
- Maintain Custom Notifications. When you select the Disabled check box, Workday won't send the custom notification through configured channels such as email or SMS. The notification also won't display on the bell icon.

To edit a custom notification on the Notifications tab of a business process definition, select Business Process > Edit Notification from the related actions menu of the custom notification.

Related Information

Concepts

Concept: Custom Notifications on page 1100

Concept: Email Templates on page 267

Setup Considerations: Workday Messaging on page 290

Concept: Notification Designer on page 285

Tasks

Create Business Process Condition Rules on page 1011

Steps: Set Up Auditing on page 696

Reference

Reference: Edit Tenant Setup - Notifications on page 107

Reference: Edit Tenant Setup - System on page 164

2023R1 What's New Post: Send Emails From Multiple From Addresses

2023R2 What's New Post: Notification Designer for Business Processes

Configure Business Process System Notifications

Prerequisites

Security: *Set Up: System* domain in the System functional area.

Context

Email templates determine the layout of system notifications generated from business processes. Users that belong to security groups with Modify permission in the *Set Up: System* domain can configure email content of system notifications, including a different system notification resulting from a send back action.

Steps

1. Access the Configure Content of Business Process System Notifications task.

   You can access the View Configured Content of Business Process System Notifications report to view current notification configuration.

   In the report, you can preview configured system notifications which are sent to a specified email. In the sample notification, we display field names and not actual values.
2. Configure the Email Content for All System Notifications section. In the Subject and Body grids, you can select these options:
   - Text: Enter content for the subject line of the email or the body of the email.
   - External Field: Select a report field to use for the subject or the body of the email, such as *Assigned to Worker*, *Status*, or *Due Date*. Similar to creating a report, you can use report fields in an email that returns specific information or data for the business process and that's specific

to the recipient. However, report fields you can use in system notifications are restricted to global report fields and event record report fields.

In the Subject and Body grids, you can use a combination of both text and report fields in the system notification. You also can configure the order of each item.

Example: In the body of system notifications, you want to display the name of the person that the task is about. In the Body grid, you add:

- Row 1: Text and enter *Complete this action for:*
- Row 2: External Field and the *Worker for Step* report field.

When an approver receives a system notification for a time-off request, Workday displays the:

- Subject as: *A Task Awaits You: Approval by Manager - Mike Rooney*.
- Body as: *Complete this action for: Mike Rooney*.

3. (Optional) Configure the Email Content for "Send Back" System Notifications section for notifications resulting from a Send Back action. Similar to step 2, in the Subject and Body grids, you can use a combination of these options:

   - Text: Enter content for the subject line of the email or the body of the email.
   - External Field: Select a report field to use for the subject or the body of the email.

   Example: In the subject of system notifications, you want to display the name of the business process that's sent back. In the Subject grid, you add:

   - Row 1: Text and enter *A task was sent back for:*
   - Row 2: External Field and the *Business Process Definition* report field.

   When the recipient receives a system notification for a time-off request that's sent back by their manager, Workday displays the:

   - Subject as: *A task was sent back for: Request Time Off for 1000 Global Modern Services*
   - Body as: *Please log into the Workday system to complete this action*.

Result

Workday generates a system notification for business processes using the content configured on this task. To use the default system notification content, you can remove the configuration in the grids.

We also display the system notification content on the Full Process Record. On the All Events tab, the All Notifications grid displays the content in these columns:

- Email Subject.
- Email Body.

For system notifications, the Informational column displays No.

You can disable sending system notifications by accessing the business process definition. On the Notifications tab, click Maintain System Notifications and select the Disabled check box for steps you don't want to send system notifications for.

Related Information

Concepts

Concept: Email Templates on page 267

Schedule Alert Notifications

Prerequisites

Security: *Business Process Administration* domain in the System functional area.

Context

You can use alert notifications to remind recipients that they have a task or business process awaiting action. Business process alert notifications are related to an entire business process. Task alert notifications are related to business process steps, such as *Approval* or *Action* steps.

You can send notifications based on:

- Due dates.
- When you initiate a business process or assign a step.

You can send:

- Multiple notifications for an incomplete task or overdue action. Example: Send a second notification when the task is 1 week overdue.
- Notifications to other roles besides the initial recipient, such as the recipient's manager.

Because the alert background process can take a long time to run, Workday recommends that you use configurable alerts to schedule and send notifications.

Before migrating reports, consider the downstream impact to edited reports in lower level tenants so that you don't migrate potential issues. Workday recommends that you validate reports after migrating them and consider the downstream impact to alerts and other processes.

A data migration error might occur when you use Object Transporter or a web service to migrate alerts that reference a custom report. This can occur when you edit a custom report and remove a prompt or configure it as Do not prompt at runtime. If you encounter an error when migrating alerts, correct the impacted alerts before attempting to migrate them again. The Object Transporter migration error message provides details on how to resolve the issue.

For alerts with a status of Expired or Suspended, you can edit and save the alert to resolve migration errors. You might need to update the alert's future end date. Example: An expired alert has a Run Frequency of Daily Recurrence. In the Range of Recurrence section of the alert, you update the End Date to be in the future.

If expired or suspended alerts become active after you edit and save it, make sure you set the alert to Suspended before attempting the migration. After the alert successfully migrates to the target tenant, verify the alert is still in Suspended status. If the alerts have an Active status in the target tenant, set them to Suspended.

Steps

1. Access 1 of these tasks:
   - Schedule Business Process Alert Notifications
   - Schedule Task Alert Notifications
2. Select a run frequency.

   The run frequency controls the Schedule tab, where you can configure how often the recipient gets new notifications about the same outstanding task or business process.
3. As you complete the task, consider:

Option	Description
Compared to	To calculate the dates for your task or business process alert notifications, use the date of the *Compared to* option you selected plus 1 day for notifications after the date or minus 1 day for notifications before the date. The *Compared to* options are: • Before or after a due date. • Before or after an effective date.

Option	Description
	• After an initiation date. • After an assignment date. • None of the above. Workday calculates the compared to date as day zero and adds or subtracts from that day according to the options you select. Example: You set up a task alert notification for 3 days before an April 15 due date. The alert notification date is April 11 because April 15 is day zero and the count starts on April 14.
Alert Rules	You can select a condition rule to provide additional controls for when Workday sends the alert notification.
Use Default Text	When you clear this check box, you can write a custom subject and message text for the alert email.
Additional Security Groups to notify	When you select security groups, Workday sends a separate email to members of those groups. Example: Notify an HR Partner or manager when Workday sends an alert notification to a worker.
Track Messages Sent	When you select this check box, Workday keeps a record of the alert notification that you can view on the Messages tab of the View Background Process Notifications report. Workday recommends that you use this option sparingly to reduce data generation.

4. As you complete the Schedule tab, consider:

Option	Description
Dependency	Displays only when you select Dependent on the Run Frequency prompt. Select an active alert that this notification schedule is dependent on. The schedule or frequency of the alert notification depends on the alert you select in this Dependency prompt. Example: You want to schedule alert notifications for payroll tasks that are dependent on the *Hire* and *Termination* business processes.
Trigger on Status	Displays only when you select *Dependent* on the Run Frequency prompt. Select the status of the dependency that triggers publishing the alert notification, such as when the dependency has completed or failed.
Catch Up Behavior	Displays only when you select *Custom Recurrence* on the Run Frequency prompt.

Option	Description
	You can select whether to resend the notification after your tenant goes offline for maintenance issues. When you select: • *None*, Workday doesn't resend the notification outside of the current schedule. • *Run Once*, Workday resends the notification once to make up for the missed schedule.
Custom Start Time	Displays only when you select *Custom Recurrence* on the Run Frequency prompt. You can select the time of day when you want to send the alert notification.

Result

When the addressee doesn't have an email address, you receive an email indicating that the notification process completed with errors.

Related Information

Concepts

Concept: Alerts on page 258

Tasks

Create Business Process Condition Rules on page 1011

Reference

Reference: Scheduled Future Processes on page 740

Concept: Custom Notifications

You can create custom notifications that trigger on any business process step, or on the status of the business process as a whole. You can also delay when a custom notification is sent by configuring a notification delay on the business process and not just for recruiting business processes.

Workday doesn't respect routing modifiers in custom notifications when line-level routing is configured on a business process.

You can also configure a business process to send custom notifications through the Workday Messaging delivery channel as an SMS message.

Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

To configure SMS messages, you must:

1. Enable the Workday Messaging SKU.
2. Configure the SMS settings on the Edit Tenant Setup – Notifications task in your tenant.

From Email Address in Notifications

On any business process definition, you can create custom business process notifications to use a different sent From email address in the notification. Example: You want to send customer invoices from a different email address for each subsidiary company within your parent organization.

On the workflow notification task, you can select a Customer SMTP configuration option in the Email Configuration prompt.

Based on your custom business process notification setup, Workday processes the configuration and displays the respective email addresses in the notification to the recipient. On the workflow notification task, when you:

- Select a Customer SMTP configuration override, we display the From Address you specify there as the sent From email address.
- Don't select a Customer SMTP configuration override, we display the From Address you specify in the Default SMTP Configuration on the Edit Tenant Setup – Notifications task as the sent From email address.
- Enter an email address in the Reply To Email Address field and select a Customer SMTP configuration override, we display the From Address you specify in the Customer SMTP configuration override as the sent From email address. We display the Reply To Email Address as the reply to email address.
- Enter an email address in the Reply To Email Address field, but don't select a Customer SMTP configuration override, we display the Reply To Email Address as the reply to email address. We display the From Address you specify in the Default SMTP Configuration on the Edit Tenant Setup – Notifications task as the sent From email address.

When you use the notification category type on the Edit Tenant Setup – Notifications task and the notification routing rule is set to a frequency of:

- Immediately: We use the Customer SMTP configuration override on the workflow notification task. We display the From Address as the sent From email in the notification.
- Daily: We use the tenant-level SMTP configuration and display the From Address as the sent From email in the notification.

Delegation and Custom Notifications

When you delegate My Tasks items and the initiation of business process actions to another person, the delegate receives associated custom notifications.

A delegate receives a custom notification when you create a custom notification and identify the:

- Delegator as the recipient in the Recipients prompt (by selecting a report field the person is associated with) or use the security group in the Groups prompt (by selecting the security role related to the event).
- Delegate as the recipient in the Recipients prompt (by selecting a report field the person is associated with) or use the security group in the Groups prompt (by selecting the security role related to the event). If the delegator retains My Tasks access, the delegator also receives the custom notification.

  The delegate might receive multiple notifications. Example: Logan and Betty work in the Osaka office. Logan delegates to Betty and retains My Tasks access. Workday sends a notification to workers in Japan. Betty receives 2 notifications: 1 as a recipient and the other as Logan's delegate. Logan retained My Tasks access, so also receives a notification.

Workday only sends delegation notifications to the delegate, unless the delegator retains My Tasks access.

This also applies to alternate delegation.

Notification Delays

When you don't want to send notifications immediately, you can configure a delay for custom notifications.

Example: On 2023-11-15, a manager completes a probation review for an employee a few months before the probation period ends, but you don't want to send the notification to the employee immediately. You configure a notification delay to send the custom notification after the probation review period ends on 2024-02-15.

When you create or edit a custom business process notification on the business process, you can configure the delay in the Delay Notification section. You can create the delay using either the moment the trigger occurs or a report field and define the amount of time for the delay.

When you base the notification delay on a field, and that field is blank, Workday evaluates the delay and sends the notification based on the current date. Example: You configure a custom notification to delay by 2 days based on a hire date. Workday triggers the notification on Monday but there's no hire date, so we send the notification on Wednesday.

When you have SMS message content and notification delay configured on the business process, Workday sends the notification at the same time as the email notification. When you disable SMS in your tenant but there's a pending SMS notification, Workday won't send the SMS message.

Time Zone and Notification Delays

On the Edit Tenant Setup - System task, you can configure time zone settings to delay sending notifications. In the Time Zone Configuration section, you can specify the time zone setting for calculating the date of the notification delay. You can select:

- Workday Default Time Zone Settings (PST): Workday sends notifications in Pacific Standard Time (PST).
- Tenant Default Time Zone Settings: Workday sends notifications in the tenant time zone. Workday uses the value from the Default Timezone prompt to calculate the notification delay. When you don't select a value in the Default Timezone prompt, we use the time zone of the person receiving the custom notification to calculate the notification delay. But if the person receiving the notification doesn't have a time zone, we use PST to calculate the notification delay.
- Event Related Time Zone: Workday sends notifications based on the time zone in the following order. When the:

  1. Event is about a worker, we use the time zone of that worker.
  2. Event isn't about a worker (such as a supplier invoice) but a worker initiates the event, we use the initiator's time zone to calculate when the notification delay trigger begins. When the initiating action is delegated, we use the time zone of the delegator and not the delegate's time zone.
  3. Notification is sent to a person, we use the time zone of that person.
  4. Person receiving the notification doesn’t have a time zone, we use the Default Timezone field configuration.

SMS Messages for Custom Notifications

When you enable SMS messaging in your tenant and email, mobile push notifications, and SMS are delivery channels for custom notifications, we send notifications based on the configuration on the workflow notification task:

Configuration	Notifications
On the workflow notification task, you configure the: • Subject and Body fields in the Email Message Content section or the Override Email Template prompt. • SMS Message Content section.	Workday sends: • An email. • A mobile push notification. • An SMS message. Workday generates the SMS message based on the content configured in the SMS Message Content section. Workday uses the same language and locale as the email message.
On the workflow notification task, you don't configure the:	Workday sends:

Configuration	Notifications
• Subject and Body fields in the Email Message Content section. • Override Email Template prompt. • SMS Message Content section.	• An email with static content with no email body. • A mobile push notification.
On the workflow notification task, you: • Configure the Subject and Body fields in the Email Message Content section or the Override Email Template prompt. • Don't configure the SMS Message Content section.	Workday sends: • An email. • A mobile push notification.
On the workflow notification task, you: • Don't configure the Subject and Body fields in the Email Message Content section or the Override Email Template prompt. • Configure the SMS Message Content section.	Workday sends: • A mobile push notification. • An SMS message. Workday generates the SMS message based on the content configured in the SMS Message Content section. Workday uses the same language and locale as the email message.

When you use a report field in the SMS message that the recipient doesn't have security permission to access, we display Not Available instead of the report field value in the notification.

Workday generates the SMS Message content using the same language and locale as the email message.

Workday doesn't create a notification event if the recipient didn't opt in to SMS with their mobile phone number. When users don't opt in to SMS on their mobile phone number, we send SMS only on a routing rule. Workday doesn't send the SMS message and a notification won't display on a user's Notifications page.

Related Information

Concepts

Setup Considerations: Workday Messaging on page 290

Tasks

Create Custom Notifications on page 1091

Reference

2023R1 What's New Post: Send Emails From Multiple From Addresses

Questionnaires

Steps: Create and Manage Questionnaires

Context

Workday enables you to create and modify questionnaires to gather information during a business process. You can correct questionnaire responses for some, but not all business processes. To view the business process types that enable questionnaire response changes, run the Business Process Configuration Options report.

Steps

1. Configure Questionnaires and Questions on page 1105.

   Create, edit, and copy questionnaires and questions using 1 user interface. You can also preview questionnaires and export them to Excel and PDF format.
2. (Optional) View Questionnaire Responses in Approval Steps on page 1108.
3. (Optional) From the related actions menu of a business process event, select Business Process > Correct Questionnaire Response.

   Select the Questionnaire Response that you want to correct.

   Only the initiator of a Request event can correct their questionnaire responses within the Request. When you select Hide Questionnaire Response for a questionnaire, Workday doesn't display the response in the Correct Questionnaire Response related action for an event.

   Security: *Questionnaire Results* domain in the System functional area.
4. (Optional) Steps: Purge Questionnaire and Survey Responses on page 1109.
5. (Optional) Access the Maintain Questionnaires task.

   Add or remove Questionnaire Types, business process types in the Allowed on Business Processes column, and view Questionnaire Security Segments for the questionnaire.

   Security: *Questionnaire Creation and Distribution* domain in the System functional area.
6. (Optional) Access the Maintain Question Tags task.

   Add tags, edit tag names, view tag Usage Count and the questions associated with the tag. You can only delete question tags that aren't associated with any questions.

   Security: *Question Library* domain in the System functional area.
7. (Optional) Access the Delete Questionnaire task using global search or from the related actions menu of a questionnaire.

   You can delete questionnaires that aren’t currently in use.

   You can't delete questionnaires that are:

   - Currently in use.
   - Have results.

   When you delete a questionnaire, Workday doesn't delete related questions as you can use the same question in multiple questionnaires. However, Workday marks related question scores for deletion so you can't access them.

   Security: *Questionnaire Creation and Distribution* domain in the System functional area.
8. (Optional) Access the Delete Questions task using global search or the related actions menu of a question.

   You can delete questions that don't display in questionnaires, or questions that have no results.

   You can't delete questions that:

   - Display in questionnaires currently in use.
   - Have results.

   Security: *Question Library* domain in the System functional area.
9. (Optional) Steps: Configure Questionnaire Security Segments on page 1109.
10. (Optional) From the related actions menu of a question, select Question > Create Report Field.

    Enter a unique name for the report field.

    Select a business object from the Business Object Enabled for Questions prompt.

    When prompted, select 1 or more responses from the For Answer prompt.

    Security: *Set Up: Questionnaire Calc Fields* domain in the Recruiting and Talent Pipeline functional areas.

Next Steps

Access these reports:

Reports	Considerations
Find Questionnaires	You can enter a filter name to save your search filter for repeated use. Security: *Reports: Questionnaires* domain in the System functional area.
Find Questions	You can select more than 1 questionnaire name, question name, question type, and question tag. If you don't specify an As Of moment, Workday selects the current moment by default. Workday displays every version of the question up to the As Of moment. Security: *Question Library* domain in the System functional area.
View Questionnaire	You can view, preview, and export completed questionnaires. Security: *Questionnaire Creation and Distribution* domain in the System functional area.
View Questionnaire Responses	Filter results by a particular student (using Questionnaire Target) for a particular application or questionnaire (using Questionnaire Target Context).

Related Information

Concepts

Concept: Questionnaires on page 1110

Setup Considerations: Surveys on page 1398

Tasks

Create and Send Surveys on page 1401

Configure Questionnaires and Questions

Prerequisites

Security: *Questionnaire Creation and Distribution* domain in the System functional area.

Context

You can create, edit, and copy questionnaires and questions using 1 interface. You can also preview questionnaires and export them to Excel and PDF format. You can distribute questionnaires using a business process to gather relevant information.

You can't edit questionnaires that already have results in Workday. Before a questionnaire has results, you can:

- Add or remove questions.
- Change the scores for possible answers.
- Delete the questionnaire.
- Mark questions as required.

- Sort the order of questions.

You can manage questions and questionnaires independently. Example: For reporting over time, you can reuse questions in several questionnaires. When you modify a question that has results, Workday creates a new version of the question. You can distinguish between question versions by viewing the question details.

Steps

1. Access the Configure Questionnaire task.
2. Create, copy, or edit a questionnaire. As you edit questionnaire details, consider:

Option	Description
Questionnaire Display Name	Workday displays this name to respondents. When you don't enter a display name, Workday uses the name in the Questionnaire Name field.
Questionnaire Types	(Optional) Select 1 or more questionnaire types to use a questionnaire in a specific application area. Example: Select *Recruiting* to add a questionnaire to a job requisition.
Allowed on Business Processes	(Optional) Select 1 or more business process types from the Allowed on Business Processes prompt. You can then select the questionnaire when you configure the *Complete Questionnaire* step on these business process types. When you change the allowed business process types on a questionnaire, Workday doesn't apply your updates until you edit the business process definition and: • Remove the questionnaire from the *Complete Questionnaire* step. Workday no longer associates that questionnaire with the business process definition. • Keep the questionnaire in the *Complete Questionnaire* step. Workday displays an error message stating that the selection doesn't meet the restrictions defined for the field. Workday displays a full list of business process types that allow questionnaires on the Business Process Configuration Options report.
Inactive	You can't use inactive questionnaires in tasks or web services.
Questionnaire Instructions	(Optional) Enter Questionnaire Instructions to assist respondents when they answer the questionnaire.
Usage	Workday displays the total number of times that you distribute the questionnaire, reference it in a business process, or both.

3. Select the questionnaire and click Maintain Questions.

   Workday enables you to edit any questions you add from the left navigation.

   Workday includes the number of questions in the questionnaire at the end of the name.
4. Select a question to update or add a row to create a question. As you maintain questions, consider:

Option	Description
Question Body	When you don't enter a question name, Workday uses the first 50 characters from this field as the name.
Question Type	You can create and configure up to 6 follow-up branching questions for *Multiple-Choice Single-Select* questions. • Possible Answer - Enter up to 25 options for each multiple choice answer. You can't use an answer more than once in a question. • Score - You can enter scores as positive or negative integers. Workday calculates the total score for a completed questionnaire by adding the integers for the selected answers. • Question Tags - You can associate multiple tags with a question.
Outdated	You can view this option only when you update a question. Select Update Outdated Question to use the updated version.
Required	You can configure a branching question as required for the respondent to continue with the questionnaire.

5. (Optional) Select a question and click Edit Question.

   When you inactivate a question that's in use, Workday creates a new version of that question and marks the current version as *Inactive*. The inactive version of the question doesn't display in prompts and you can't add it to questionnaires, but you can include it in reports.
6. (Optional) Preview the questionnaire.

   Workday displays the questionnaire as it will display in My Tasks.
7. (Optional) Export the questionnaire.

   Select an export format.

Result

Workday uses the time that you submit the questionnaire as its effective moment.

Next Steps

Distribute questionnaires.

Related Information

Concepts

Concept: Questionnaires on page 1110

View Questionnaire Responses in Approval Steps

Prerequisites

- To view questionnaire responses in an *Approval* or *Approval Chain* step of a business process, the security groups on the business process step must have access to the *Questionnaire Results* domain or have access to a security segment on the domain.
- To view questionnaire responses in an *Approval Chain* step, each approver in the chain must have access to the *Questionnaire Results* domain.
- You must have a *Complete Questionnaire* step preceding the *Approval* or *Approval Chain* step in the business process definition in order to view questionnaire responses.
- Security: These domains in the System functional area:
    - *Business Process Administration*
    - *Manage: Business Process Definitions*

Context

Workday enables business process approvers and reviewers to look at the results of questionnaires that users completed in prior steps of the business process. Each user who completes a questionnaire has a unique response. Multiple users can't share the same response.

You can't review questionnaire results on a *Consolidated Approval* step. You must add a separate *Approval* step to do so.

Steps

1. From the related actions menu of an *Approval* or *Approval Chain* step on the business process, select Business Process > Configure Supporting Information.

   You can configure supporting information on some *Action* steps when there's a questionnaire in a previous step of the business process. Example: *Review Employee Hire* action step.
2. Select an Effective Date.

   The default effective date is the current date.
3. Enter the Time Zone.

   The default time zone is the user's current time zone. You can only enter a time zone if you select the Business Process Configuration Time Zone check box on the Edit Tenant Setup - System task. When you enter:

    - The current date, the changes take effect on the day of processing in the specified time zone. Users in other time zones see the changes at 00:00 (midnight) in the specified time zone.
    - A future date, the changes take effect at midnight on that date in the specified time zone and at the corresponding date and time in other time zones.
    - A past date, the changes take effect at 23:59:59 on that date in the specified time zone and at the corresponding date and time in other time zones.
4. In the Complete Questionnaire Step prompt, select a questionnaire completed in a prior *Complete Questionnaire* step in the business process.

   When you copy a business process definition that includes a *Complete Questionnaire* step, Workday also copies any supporting information configured on the corresponding *Approval* and *Approval Chain* steps to the new business process definition. If a questionnaire is inactive or isn't allowed for that business process, Workday doesn't copy the questionnaire or the supporting information to the new business process definition.

Result

When the business process is assigned to the approver or reviewer, the name of the questionnaire is displayed in the Additional Information section. Click the number next to Respondents to view the answers to each question for each respondent to the questionnaire. You can also export the questionnaire responses to Excel or PDF formats.

Steps: Purge Questionnaire and Survey Responses

Prerequisites

Security: *Purge Person Data* domain in the System functional area.

Context

You can purge responses listed on an input report, including the response answers and attachments, for questionnaires and surveys using the Purge Person Data task. We recommend that you:

- Purge questionnaire responses before purging worker data.
- Test the input report and purge in your Preview environment before you purge any data in your Production tenant.

Steps

1. Access the Create Custom Report task.
    - For Report Type, select *Advanced*.
    - For Data Source, select the Questionnaire Responses for Purge report data source and click OK.
    - From the Edit Custom Reports task, select the *purge* report tag.
2. Access the Purge Person Data task.
3. As you complete the task, consider:

Option	Description
Purge Plan	Leave blank. Purge plans don't apply to questionnaire and survey purge.
Purge date-driven items dated	Leave blank. Date-driven purge doesn't apply to questionnaire and survey purge.

Result

Workday purges all responses (including the response answers and attachments) for questionnaires and surveys identified in the input report.

Steps: Configure Questionnaire Security Segments

Context

You can manage questionnaire security segments so that segment-based security groups have access to the appropriate questionnaire answers and responses. You can select segment-based security groups with access to specific questionnaire security segments.

Steps

1. Access the Create Questionnaire Security Segment task.

    From the Questionnaire prompt, select 1 or more questionnaires to include in the segment.

    Security: *Set Up: Questionnaire Security Segments* domain in the System functional area.

2. Create Segment-Based Security Groups.

   From the Type of Tenanted Security Group prompt, select Segment-Based Security Group.

   Select 1 or more Security Groups and questionnaire security segments that the security groups can access.

   From the Access to Segments prompt, select the questionnaire security segments to which members of the specified security group have access.

Result

The selected segment-based security groups have access to only the specific questionnaire answers and responses that belong to questionnaires in the questionnaire security segment. The questionnaire security segment doesn't restrict access to who can view the questionnaire itself.

Next Steps

Use these Workday reports and tasks to manage questionnaire security segments:

- Delete Questionnaire Security Segment
- Edit Questionnaire Security Segment
- Find Questionnaires
- View Questionnaire Security Segment

Related Information
Tasks
Create Segment-Based Security Groups

Concept: Questionnaires

Workday enables you to add a questionnaire on allowed business processes to gather information.

Example: Include a questionnaire on job requisitions to screen candidates based on criteria such as experience, location, and education. After mapping answers to the questions, you can then use the collected data for filtering purposes.

You can configure questionnaires to ask different types of questions, including date, numeric, and multiple choice with branching questions to gather follow-up information. You can also assign scores to answers and view the total score that Workday calculates on completed questionnaires.

Related Information
Tasks
Configure Questionnaires and Questions on page 1105

Requests

Setup Considerations: Requests

You can use this topic to help make decisions when planning your configuration and use of Requests. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

High-level process:

- Administrators can create multiple request types with different steps and approvers.
- Users initiate requests and can initiate requests on behalf of someone else.
- Reviewers can review requests initiated by users and, if needed, make changes to the request before the completion step.
- Process users implement requests by approving, closing, and setting resolutions on closed requests.

The *Request* business process enables you to set up custom request processes that users initiate and administrators track within Workday. You create different request processes by defining who makes, reviews, approves, and completes the requests. When the process completes, you have a record of this information.

A request doesn't change anything on its own. It's a request for action.

Business Benefits

You can:

- Define your own request types and process flows.
- Consolidate request processes across your organization, eliminating requests submitted through email, word-of-mouth, and so on.
- Keep track of the initiation, review, approval, implementation, and final verification processes for your requests.
- Audit the *Request* business process history for completed requests.
- View the request on the audit trail for that business object if a request is associated with a Workday business object.
- Configure the security access, steps, and levels of required approval.

Use Cases

You can consolidate your organization's processes for making requests and changes by configuring the *Request* business processes. Employees can then apply for new resources or changes to existing resources, such as:

- Business processes.
- Job descriptions.
- Learning courses.
- Office equipment.
- Organizations.
- Reports.
- Security groups.
- System account access.

You can initiate requests on behalf of someone else, such as:

- Submit a return to office request for an employee.
- Request security access or roles for another person.
- Submit a department request on behalf of a managing director, chief of staff, or department head.
- Submit HR-related requests for an employee.

Questions to Consider

- What are the request processes you want Workday to handle?

- What are the request process details for your request processes, such as:
    - Who can make a request?
    - Who can approve a request?
    - Who will fulfill a request?
    - How do you want to track and audit requests?
    - Is there information that I want to collect?

Recommendations

To simplify your setup, consider:

- Using a rule-based *Request* business process definition for each request type you use. In this way, you create independent process flows for different request types.
- Configuring the Requests worklet on the Home dashboard to display relevant tasks and reports, improving usability and accessibility.
- Configuring a request type to enable users to initiate requests on behalf of another person with a worker or a nonworker role, like a student or extended enterprise learner. If required, you can change the configuration even after a request associated with the request type initiates.

To prevent redundancy with questionnaires, Workday recommends that you configure whether the Describe the Request field on request types displays to users. This action helps you control what users see on their request form when they run the *Request* business process.

Requirements

- The *Review Request* action step must always occur before the completion step in a *Request* business process.
- The *Close Request* action step must always be the completion step in a *Request* business process.

Limitations

- Only the request initiators and reviewers can change request content.
- You can only link requests to the business objects Workday displays when you create a request type.

Tenant Setup

No impact.

Security

Configure the *Request* business process and security policy in the System functional area.

The *Request* business process defines the worker as the initiator of the *Request* business process. When you configure the business process security policy, and you select the:

- Hide Comments from Person check box, the worker won't be able to view comments on the Process tab of the Full Process Record that they didn't enter.
- Hide Details from Person check box, the worker won't be able to view business process details.

When you select the check boxes, Workday displays comments or details of a Request event to nonworkers (such as an integration user or implementer) that have access to the event.

The Hide Details from Person check box overrides the Hide Comments from Person check box. Meaning, if you only select the Hide Details from Person check box, Workday hides both comments and details of the event.

Understand segment-based security groups and segmented security, and determine how you want to restrict request type access for groups of workers.

When you configure security for a request type, security groups you select for the View All field can view all event details for requests of this request type.

Configure these domains in the System functional area:

Domains	Considerations
Set Up: Requests	Users secured to this domain can create and view request types.
Self-Service: Requests	Users secured to this domain can view their requests and request types.
View: Requests	Users secured to this domain can view requests.
Set Up: Request Type Security Segments	Users secured to this domain can create request type security segments.
Reports: Requests	Users secured to this domain can view reporting on requests.

Business Processes

Business process administrators can add multiple steps to a *Request* business process definition, including approvals or additional questionnaires. Workday routes request steps according to the organization of the request initiator. Example: Workday routes a step to the HR Partner of the initiator and not the subject of the request.

- When you don't create a rule-based *Request* business process definition for a request type, Workday uses the default *Request* business process definition.
- When you configure a rule-based *Request* business process definition, you can create a hierarchy of condition rules that determines which *Request* business definition Workday runs.

Reporting

Reports	Considerations
My Requests	Displays all requests initiated by the user.
All Requests	Displays all requests initiated in Workday.
My Recent Requests	Displays open and completed events initiated in the past 7 days by the user.
Requests in Progress	Displays all request business processes currently underway.
Requests Submitted on My Behalf	Displays all requests initiated by another person on behalf of the user. We display information such as the request: • Completion date and initiation date. • Status and resolution.
View Request Types	Displays the request types the user can access.

You can use these report data sources in your custom reports:

- All Requests
- My Requests
- Request Types
- Requests On My Behalf

The Request Description Display setting won't impact your reports, and the Describe the Request field will continue to display in your reports.

Integrations

No impact.

Connections and Touchpoints

No Impact.

Related Information
Tasks
Configure Rule-Based Business Processes on page 1014
Reference
Workday 29 What's New Post: Request Framework

Set Up Request Types

Prerequisites

Security: *Set Up: Requests* domain in the System functional area.

Steps

1. Access the Create Request Type task.
2. As you complete the task, consider:

Option	Description
Workday Object	Link a request to a Workday object enabling you to view the request history in the audit trail and specify the object instance (Example: a specific worker) when you close a request.
Questionnaire	Require users to complete a questionnaire when they initiate a request. When you create or edit a questionnaire, you must select *Request Initiation* on the Questionnaire Types prompt to be able to add the questionnaire to a request type. See Configure Questionnaires and Questions on page 1105
Restrict Questionnaire Responses	Select when you want to restrict questionnaire responses to users in security groups on the *Questionnaire Results* domain only. When unchecked, questionnaire responses are visible to all users with access to view request details.
Request Description Display	Enables you to control the visibility of the Describe the Request field when you run the *Request* business process. Select 1 of these options: • *Hide*: Workday won't display the field on requests.

Option	Description
	• *Optional*: Workday displays the field on requests, but entering information is optional. • *Require*: Workday displays the field on requests and entering information is required. For existing requests, Workday requires the request description by default. This setting won't affect your reports, and the Describe the Request field will continue to display in your reports.
Inactive	Select to hide the request type when creating a new request. In the list of request types, *Workday* displays for creating a new request. Any currently running requests created with this request type aren't affected.
Allow Request on Behalf of Person	Select to enable users to initiate requests on behalf of another person with a worker or a non-worker role. Example: a student or extended enterprise learner. You can select or clear the Allow Request on Behalf of Person check box on the Edit Request Type task even after a request associated with this request type is initiated. When you select the check box, Workday displays the On Behalf of Person prompt on these tasks: • Create Request • Close Request • Revise Request You won't be able to change the On Behalf of Person prompt on the Close Request and Revise Request tasks. When you don't select an on-behalf-of person on the Create Request task, Workday doesn't display a value in My Tasks or on the Close Request and Revise Request tasks.
ID Generator	Select the ID generator format for this request type or create a new one using the Create ID Definition / Sequence Generator task. Workday generates an ID for each request based on the ID generator format and the time of request creation. Note: Potential duplicate IDs generate warnings. We recommend that you use unique values for ease of reviewing your data. The request ID displays when you close and correct details of a request resolution, as well as on the Details tab when you view the event.

Option	Description
	Note: When generating a request ID, Workday first checks if an ID generator is configured on the request type. If there isn't, Workday then checks the tenant setup and uses that ID generator configuration. If neither the request type nor the tenant setup has an ID generator configured, the request remains blank.
Security Configuration	Select the security groups that can initiate, view the details of, and correct the details of request resolutions. These security groups must be on the corresponding actions of the *Request* business process security policy.
Close Step Configuration	Select groups to enable users to further categorize the request or the resolution. From the Request Resolutions prompt, you can select from Workday-delivered resolutions or add custom request resolutions. Custom resolutions can be created using the Create Request Resolution task within the prompt. Note: A request type must have at least one request resolution. You can maintain custom request resolutions for all request types with the Maintain Request Resolutions task. Note: You cannot manually select *Canceled* as a resolution status. Workday automatically sets the status of a canceled request to *Canceled*.

Result

When users access the Create Request task, Workday displays only request types that users have permission to initiate.

When you select the Allow Request on Behalf of Person check box and a user submits a request on behalf of another person, Workday:

- Displays the on-behalf-of person on the request event. Example: If Logan McNeil submits a request on Betty Liu's behalf, Workday displays *Betty Liu* on the request event.
- Makes the user that submits the request the initiator of the request.
- Routes the request based on who the on-behalf-of person is.
- Sends notifications for the Employee as Self security group to the person on whose behalf the user submits the request for.

Next Steps

Users can correct the Request Subtype, Resolution, and Resolution Details fields only after a request successfully completes. They cannot correct other fields.

Optionally, users can select a request resolution when sending back a request. However, when users close a request, they must select a Workday-delivered or custom request resolution. They can also:

- State which instance of the Workday object they changed. The prompt indicates which Workday object is linked to the request type.

- Enter a Request Subtype if a Request Subtype Group is configured for the request type. Example: *Work from Home* is a main request type, and its subtypes can include *WFH due to bad weather* or *WFH for childcare purposes*.
- Enter the Resolution Details if a Resolution Details Group is configured for the request type. Example: If the resolution is *Done*, the resolution details can include *Approved WFH for one day* or *Granted permanent WFH*.

Related Information

Concepts

Concept: Requests on page 1118

Reference

Reference: Request Related Reports on page 1119

Steps: Maintain Access to Request Types

Prerequisites

- Understand segment-based security groups and segmented security.
- Determine how you want to restrict request type access for groups of workers.

Context

You can configure security groups to restrict the availability of request types' details to members of designated security groups.

Steps

1. Access the Create Request Type Security Segment task.

   In the Request Type prompt, select the request types to include in the segment.

   Create enough segments to cover each unique security access requirement. Included values can cross multiple segments or be mutually exclusive. Workday recommends that you build from least to most restrictive.

   Security: *Set Up: Request Type Security Segments* domain in the System functional area.
2. Access the Create Security Group task.

   Create the security groups to associate with the security segments if existing security groups don't meet your business requirements.

   Security: *Security Configuration* domain in the System functional area.
3. Create Segment-Based Security Groups.

   Segment-Based Security for the Request Framework is not supported in the Attachment Settings in BP Toolbar for the Request Business Process.
4. Edit Domain Security Policies.
5. Activate Pending Security Policy Changes.
6. Test the security policy changes.

   For each security segment, sign in as a user of the associated segment-based security group. Then verify that you can only access the request types for that segment.

Result

When you associate the request type with a security group, Workday restricts access to the details of these requests to members of that group.

Example

You create a Change Organization Name request type segment and associate it to the Organization Administrators security group. On the All Requests report, only Organization Administrators can view the details of requests where the request type is Change Organization Name. A record of these requests, but not the request details, are visible to all users who have access to the All Requests data source, including those who aren't in the Organization Administrators security group.

Related Information

Tasks

Set Up Request Types on page 1114

Steps: Maintain Access to Request Types on page 1117

Concept: Requests

Workday enables you to configure requests as part of a Workday business process, making it easier for you to manage requests throughout your organization. Requests can be change requests and employee self-service requests. Requests can include:

- Changes to an organization.
- Creation or modification of security groups.
- Increasing spending limit on expenses.

You can initiate requests on behalf of another person with a worker or a non-worker role, like a student or extended enterprise learner. You can initiate requests on behalf of someone else such as:

- Submit a return to office request for an employee.
- Request security access or roles for another person.
- Submit a department request on behalf of a managing director, chief of staff, or department head.
- Submit HR-related requests for an employee.

Request Business Process

Use the *Request* business process to configure how users can create, approve, and close requests in Workday. You can:

- Create a rule-based business process definition for each different request type.
- Define security policies for each business process definition.
- Create security segments based on request types.

To enable users to create a request in Workday, add their security group to the security policy associated with the *Request* business process. Workday displays only Request Types that users have permission to initiate.

To enable users to initiate requests on behalf of another person with a worker or a non-worker role, like a student or extended enterprise learner, configure the request type.

To enable users to review a request in Workday, you must configure the Review Request *Action* step before the Close Request *Action* step on the Request business process.

You must configure the Close Request *Action* step as the last step on the *Request* business process. You can select or create Request Subtype Groups or Resolution Details Groups that users can specify when closing a request to further categorize the request or the resolution.

You can grant users permission to cancel a request that isn't yet closed by configuring Cancel permissions on the *Request* business process security policy. Users can cancel a request as a related action on the business process.

Requests Worklet

You can configure the Requests worklet on the Home page or on any custom dashboard to quickly and easily access tasks and reports for requests.

The Requests worklet contains links to these actions and reports:

Actions:

- Create Request

Reports:

- All Requests
- My Requests
- My Recent Requests
- Requests In Progress
- View Request Types

Workday only displays links to actions and reports according to users' permissions on the domains securing the actions and reports:

- *Reports: Requests*
- *Self-Service: Requests*
- *Set Up: Requests*

If you don't have access to any of these domains, Workday doesn't display the Requests worklet.

Related Information
Tasks
Configure Rule-Based Business Processes on page 1014
Set Up Request Types on page 1114
Steps: Maintain Access to Request Types on page 1117
Reference
Reference: Request Related Reports on page 1119
The Next Level: Request Framework for HCM

Reference: Request Related Reports

Workday delivers a number of reports to give you greater insight into the requests created in your tenant. For a complete list of Workday delivered standard reports with their descriptions, access the Workday Standard Reports report and select the *Request* report category.

Report	Security	Description
My Requests	• *Self-Service: Requests* (Report Entry) • *View: Requests* (Report Results)	Returns all of the requests that the processing user initiated. You can use segment-based security groups to restrict the report output.
All Requests	*Reports: Requests*	Returns all of the requests initiated in your tenant. You can use segment-based security groups to restrict the report output.
My Recent Requests	• *Self-Service: Requests* (Report Entry) • *View: Requests* (Report Results)	Returns all of the open and completed requests that the processing user initiated in the last 7 days. You can use

Report	Security	Description
		segment-based security groups to restrict the report output.
Requests In Progress	*Reports: Requests*	Returns all requests that are currently in progress in your tenant. You can use segment-based security groups to restrict the report output.
Requests Submitted on My Behalf	*Self-Service: Requests*	Returns all requests submitted by another person on behalf of the processing user. In this report, we display information such as the request: • Completion date and initiation date. • Status and resolution.
View Request Types	• *Self-Service: Requests* • *Set Up: Requests*	Returns all of the request types that are accessible to the processing user.

Dynamically Generated Documents

Steps: Generate Dynamic Documents

Prerequisites

Create the *Generate Document (Default Definition) business process definition*.

Context

Dynamically generate documents such as employment agreements and offer letters using customizable templates.

Steps

1. Add Documents to Workday on page 380.

   Use the Create Document task to create templates.
2. Create Text Blocks on page 1120.

   Build the content of each template using text blocks composed of rich text and variable data.
3. (Optional) Associate Custom Layouts with Generated Documents on page 1122.

   Apply a custom layout to a dynamically generated document.
4. Configure Generated Documents on page 1122.

Create Text Blocks

Prerequisites

Security: *Document Library* domain in the System functional area.

Context

Use text blocks to build templates for generated documents.

Steps

1. Access the Create Text Block task.
2. As you complete the task, consider:

Option	Description
Name	Text block names must be unique within a source.
Source	The Source is the business process type that uses the Generate Document step for the document that includes the text block. Example: The *Offer* business process type. If you create a text block when you use the Create Document task, Workday prepopulates the Source.
Category	If an appropriate text block category isn't available, access the Create Text Block Category task to create it. Text block category names must be unique.
Inactive	You can inactivate a text block at any time.
Do Not Allow Editing	Select if you don't want the recipient of the Generate Document step to edit the text block.
Content	The content of a text block can consist of static text and report fields. Use the Insert Tag icon in the Rich Text Editor to insert report fields. You can insert: • Global Fields. • Report fields on business objects associated with the source of the text block, as well as any subprocesses of the source. You can't insert: • Fields with an Authorized Usage other than Default Areas. • Fields with built-in prompts.

Note:

Any updates to the document template follow the effective date of the business process. However, if you update a text block on a template, the change has immediate effect.

Example: *Template 1* contains *Text Block A* and *Text Block B*. If you update *Template 1* to add *Text Block C*, this change isn't displayed on the business process because it was initiated prior to the template update. However, if you make changes directly to *Text Block A*, these updates are immediately visible on the business process, regardless of the business process initiation date.

Next Steps

You can assemble text blocks in any order to build templates for generated documents. Although you can insert report fields when you create a text block, Workday doesn't pull dynamic data into the text block until you generate a document when you run a business process that includes a Generate Document step.

Related Information
Concepts
Concept: Text Blocks on page 1127

Associate Custom Layouts with Generated Documents

Prerequisites

Security: *Document Generation Results* domain in the System functional area.

Context

You can specify custom business form layouts to associate with generated documents.

Steps

1. Access the Print Generated Document report on the Layout tab of the document template.
2. As a related action, select Layout > Manage Layouts and then add a custom business form layout.
3. Access the Create Business Form Layout task.
4. As you complete the task, consider:

Option	Description
Report Design	Select a Report Design from the prompt or create a Custom Business Form Report Design Attachment.
Active	Mark the layout as Active.

5. Select the layout as the Default Print Layout.

   If you create more than 1 custom business form layout, you can select only 1 as the default print layout.

Result

All of the custom layouts you create are available from the Default Layout prompt when you create a template for a generated document.

Related Information
Concepts
Concept: Text Blocks on page 1127
Tasks
Add Documents to Workday on page 380
Create Text Blocks on page 1120

Configure Generated Documents

Prerequisites

- Add a Generate Document *Action* step to a business process.

- Security: These domains in the System functional area:
    - *Business Process Administration*.
    - *Manage: Business Process Definitions*.

Context

You can use an *Action* step in a business process to dynamically create documents such as employment agreements and offer letters using customizable templates. When you dynamically generate documents, you can also use a *Review Documents* step to distribute them. Each *Review Documents* step enables you to distribute 1 generated document. When you add a *Review Documents* step, the *Action* step must precede it in the business process definition.

You must configure the *Action* and *Review Documents* steps when you add them to a business process definition. You can assign the *Generate Document* action step to any security group that is on the initiating actions of the business process where a *Generate Document* step is added.

You can correct business processes that include an *Action* step to generate documents. When you correct the business process:

- Before Workday executes the generate document step, Workday displays the corrected values in the generated document.
- When the generate document step is in progress or completed, Workday doesn't display the corrected values in the generated document.

You can't include *Generate Document* in *Consolidated Approval* and *Consolidated Approval Chain* step types.

You can add a *Generate Document* action step to model business processes that you create in Workday Extend.

Note: To enable Workday Extend, contact your Customer Base Account Executive. Workday Extend is a separate product (SKU) that requires a separate license. Workday Extend enables you to build, deploy, and share apps that run on Workday and are tailored to the specific business needs of your enterprise.

Steps

1. Select Business Process > Edit Definition from the related actions menu of the business process.
2. Add an *Action* step and select *Generate Document* from the Specify prompt.
3. (Optional) Add a *Review Documents* step.

   This step must come after the generate document *Action* step in the business process definition step order.
4. Click Configure Generate Document.
5. As you complete the task, consider:

Option	Description
Time Zone	You can only enter a time zone when you select the Business Process Configuration Time Zone option on the Edit Tenant Setup - System task. When you enter: • The current date, changes take effect on the day of processing in the specified time zone. Users in other time zones see the changes at 00:00 (midnight). • A future date in the specified time zone, the changes take effect at midnight on that date and at the corresponding date and time in other time zones.

Option	Description
	• A past date in the specified time zone, the changes take effect at 23:59:59 on the specified date and at the corresponding date and time in other time zones.
Default Document	The Default Document prompt contains only documents that are effective as of the effective date of the step configuration and have the same source as the business process type.
Step Label Override	(Optional) You can change the name on the label for certain business process steps.
Run As User	This user must be: • A member of a user-based security group secured to the *Document Generation Results* domain. • An integration system user belonging to an integration system security group (unconstrained) secured to the *Document Generation Results* domain. Recipients of this document view the report field data with the security granted to the selected Run As User. Note: The integration system user must have *View All* permission of the business processes that includes the *Generate Documents* step. Otherwise, the step doesn't generate a document and the business process is awaiting action by a user that doesn't have a task to complete in My Tasks.

6. Click Configure Document Review.

   This step is required when you add a *Review Documents* step.
7. As you configure the document review, consider:

Option	Description
Document Effective As Of	Select an appropriate event, such as Original Hire Date.
Document	Select a Document Template or a Generate Document Step. When you configure multiple documents on a *Review Documents* step, you can select only 1 of these document types from the prompt: • Document Template. • Generate Document *Action* step. • Report. After you select any 1 of these document types, Workday no longer displays the selected document type in the Document prompt.

Next Steps

When a recipient doesn't receive an expected document for review in My Tasks, access the Process Monitor report to find business process types that are associated with a *Review Documents* step to determine if there are any errors.

When a *Generate Document* event doesn't complete successfully, select Business Process > Relaunch Generate Document as a related action from the failed *Generate Document* event.

Related Information

Concepts

Concept: Action Step on page 971

Concept: Review Documents Step on page 985

Tasks

Create User-Based Security Groups

Create Integration System Security Groups

Add Documents to Workday on page 380

Create and Publish Docs Templates on page 386

Reference

Reference: Translations on page 371

Concept: Dynamic Document Generation

You can create templates and customize them to generate documents dynamically such as employment agreements and offer letters. You can use a Workday business process to review generated documents and distribute them to users for electronic signature.

- Use the Create Document task to create templates, and then build the content of each template using text blocks composed of rich text and variable data. You can also apply a custom layout to a dynamically generated document.
- Add a Generate Document *Action* step to a business process to generate a dynamic document from a template you select.
- Add a *Review Documents* step to the same business process to distribute the dynamically generated document to the appropriate users. You must configure the Generate Document step before the *Review Documents* step.

Note: To view a generated document added to the Worker Document File using a *Review Documents* step, you must belong to a security group with access to the segment that secures the associated template.

You can associate a condition rule with a custom layout, and use condition rules to determine which custom layouts Workday uses to display or print generated documents. Example: Create an offer letter that uses different custom layouts based on the characteristics of the position. Workday uses the custom layout for the generated document when the program runs only when the condition is true.

If you add custom layouts to the grid, you must select a condition rule to associate with each custom layout.

- You can't use the same condition rule more than once for the same custom layout.
- You can only select condition rules that are available within that document's context. The condition rule must be a business process condition.

If you don't add custom layouts to the grid, Workday uses the default layout for the generated document.

Note: *Generated Document Default Layout* is a Workday-delivered layout with a default document retention period of 3650 days (10 years) from the date a document is dynamically generated. To prevent document loss, update *Generated Document Default Layout* using the Edit Delivered Business Form Layout task and edit the Resulting Document Expiration Offset (in days) field to meet your business and legal requirements.

When you receive a Generate Document *Action* step in My Tasks, Workday evaluates the layout of the PDF file based on:

- The effective date of the document.
- The first condition rule in the grid that evaluates as true. If no condition rules evaluate as true, Workday uses the default layout for the generated document.

Workday only evaluates the layout of the PDF file once, and uses this layout whenever you print the PDF file, either from the Generate Document *Action* step or from the *Review Documents* step.

Concept: Generate Document Business Process

Use the *Generate Document* business process to create templates and customize them to generate documents dynamically. To initiate this business process, add a *Generate Document Action* step to a business process for which it's an allowed action. Example: *Employment Agreement* and *Offer*.

Create more *Generate Document* steps in your business process by adding more *Generate Document Action* steps to the business process that calls the *Generate Document* business process. Example: *Employment Agreement*. Don't add steps to the *Generate Document* business process.

Security

The *Generate Document* business process doesn't have its own business process security policy. The *Generate Document* business process inherits security from the security policy on the initiating action of the parent business process type.

Cancel, Correct, Or Rescind Business Processes

If you cancel the parent business process of a *Generate Document* step, either while the *Generate Document* step is In Progress or after the step is Completed, Workday also cancels the *Generate Document* subprocess.

You can correct business processes that include a *Generate Document Action* step in the business process definition.

- If you correct the business process before Workday executes the *Generate Document* step, Workday displays the corrected values in the generated document.
- If you correct the business process when the *Generate Document* step is In Progress or Completed, Workday doesn't display the corrected values in the generated document.

If you rescind the parent business process of a *Generate Document* step, Workday also rescinds the *Generate Document* subprocess. In addition, Workday removes generated documents added to the Worker Document File using a *Review Documents* step if the parent business process is worker-based.

Delegate Generate Document Tasks

You can delegate a *Generate Document* My Tasks task to another user according to your tenant delegation settings if the business process security policy of the parent business process type enables delegation. If you delegate all of your My Tasks items, your delegate will receive the *Generate Document* task in their My Tasks as long as the business process security policy of the parent business process type allows delegation.

Delegates are notified of and can view documents on a *Generate Document* step within a business process. Delegates can access generated documents using the task's View PDF button in My Tasks.

However, you can't use the Manage Delegations task to delegate the *Generate Document* subprocess itself.

You can request reassignment of a *Generate Document* My Tasks task to another user belonging to a security group with access to the initiating action on the security policy of the parent business process type.

To use the Reassign Tasks task to reassign a *Generate Document* task in My Tasks, you must be a:

- Business Process Administrator.
- Member of a security group with access to the Reassign Tasks action on the security policy of the parent business process type.

Concept: Text Blocks

You can create text blocks using a combination of text and external fields derived by Workday. Use text blocks to assemble templates that you can:

- View and edit using a Generate Document *Action* step in a Workday business process.
- Distribute using a *Review Documents* step in a Workday business process.

You can view and edit text blocks from the related actions menu of the text block. You can create, edit, and retrieve objects related to generated documents, such as text blocks and text block categories, using an EIB with these web services:

- *Get Text Block Categories*
- *Get Text Blocks*
- *Put Text Block*
- *Put Text Block Category*

You can use Object Transporter to migrate text blocks and text block categories from 1 tenant to another. Example: You can test text blocks in your Sandbox tenant, then migrate them to your Production tenant.

You can associate a condition rule with a text block, and use condition rules to determine which text blocks Workday selects to build templates for generated documents. Using condition rules enables you to generate a truly dynamic document that supports different scenarios. Example: Create an offer letter that includes or excludes certain text blocks based on the characteristics of the position.

- If you associate a condition rule with a text block, Workday includes the text block in the generated document only when the condition is true.
- If you don't associate a condition rule with a text block, Workday always includes the text block in the generated document.

Note: You can only select condition rules that are available on the source of the text block, as well as any subprocesses of the source.

Related Information

Concepts

Concept: Object Transporter on page 776

Tasks

Associate Custom Layouts with Generated Documents on page 1122

Create Text Blocks on page 1120

Business Processes Guidelines

Concept: Business Process Guidelines

This section provides topics for specific business processes. Each topic includes:

- An overview of the business process including information about the subprocesses when applicable.
- The prerequisites to use the business process, relevant security domains, and applicable process initiators.
- The limitations about what the specific business process can't do.
- Common workflow configurations for the business process.
- Guidelines and examples for each of the steps in the workflow.
- Custom notification guidelines.
- Common issues and respective solutions.

Concept: Expense Report Event Business Process Guidelines

Overview

The Expense Report Event business process in Workday is a configurable workflow that governs how expense reports are submitted, reviewed, approved, and processed. It is a critical component of the Workday Financial Management suite, designed to ensure compliance with company policies, provide a clear audit trail, and streamline the expense reimbursement process.

You can customize the Expense Report Event business process to:

- Audit expense reports for amount anomalies, incorrect expense coding and duplication of expenses.
- Route expense reports for approval based on their risk score. See Route Expense Reports Based on Risk.
- Capture feedback by including questionnaires on expense reports.
- Check budgets.
- Confirm accurate taxes on expense reports.
- Retrieve expense report data for reporting.
- Send back individual expense lines for correction.
- Track projects.

These are the sections in this topic:

Subprocesses

The Expense Report Event Business Process can be broken down into several sub-business processes:

- Expense Data Entry: Enables employees to log individual expenses and attaching receipts.
- Expense Report Creation: Aggregates multiple individual expenses into a single report for submission.
- Managerial Approval: Send for review and approval of the expense report by the employee's direct manager or designated approver.
- Finance Review & Audit: Sends for detailed examination of the report for compliance, accuracy, and policy adherence by the finance team.
- Reimbursement Processing: Initiates the financial transaction of paying the employee for approved expenses.
- Reporting & Analytics: Generates insights from expense data for budget control, tax purposes, and strategic planning.
- Initiate Expense Report Intercompany Event: Initiates when an expense report line's company differs from the header company. It routes the intercompany expense lines for approval to the appropriate stakeholders in the affiliate company. If the intercompany approvers deny the lines, the entire expense report is denied

Prerequisites

Before an expense report can be successfully processed, several foundational elements must be in place:

- Employee Setup: Employees must be registered in the HR/payroll system with valid banking information to facilitate reimbursement.
- Expense Policy Definition: A clear, documented expense policy must be established and communicated to all employees, detailing allowable expenses, limits, and required documentation.
- Expense Items: Expense Items must be created and configured, and the expense reports setup must be completed, including payment election rules for reimbursements.
- System Access: All relevant personnel, including employees, managers, and finance teams, require appropriate access to the expense management system, which could be an ERP module or dedicated expense software.
- Budget Allocation: Relevant cost centers or projects need to have sufficient budget allocated to cover anticipated expenses.
- Receipt Management: Employees must be aware of and adhere to requirements for submitting original or digital receipts for all expenses.
- Approval Hierarchies: Approval workflows and delegated authorities must be configured within the system.
- Intercompany Processing: If applicable, Intercompany Processing for expense reports should be configured to allow for changing the company on an expense line.
- Security: Domains under the Expenses and System functional areas.
    - For a list of domains under the Expenses functional area, see Reference: Security Domains for the Expense Report Event Business Process on page 1197.
    - Configure these domains under the System functional area:
        - *Business Process Administration:* Grants access to the tasks required to create and edit business process definitions.
        - *Manage: Business Process Definitions:* Grants access to manage all aspects of business processes.
        - *Management Dashboard: Expenses*: Secures access to the Expense Management Dashboard, which provides an overview of expense data and trends for the organization.
        - *Set Up: Tenant Setup - Financials*: Grants access to configure tenant-wide settings for all of Workday Financials, including Expenses.

Process Initiators

The Expense Report Event business process initiates when a user successfully submits an expense report for approval. This can be done by:

- Employees: Workers can initiate expense reports for themselves.
- Expense Data Entry Specialist or administrative staff.
- Delegates: Workers can delegate the creation of expense reports to others, such as an administrative assistant.
- Web Services: The *Submit_Expense_Report* web service can be used to create and submit expense reports from external systems. This can also be used for non-workers and applicants.
- Project Completion: All associated expenses for specific projects may be required to be reconciled and submitted upon their conclusion.

Limitations

Common limitations in the Expense Report Event Business Process include:

- Policy Ambiguity: Unclear or outdated expense policies can lead to frequent rejections and confusion.
- Manual Data Entry Errors: Reliance on manual input increases the risk of mistakes, requiring more correction cycles.

- Lack of Receipt Compliance: Missing or inadequate receipts are a frequent cause of delays and non-reimbursement.
- Approval Bottlenecks: Delays in manager or finance approval can frustrate employees and impact cash flow.
- System Integration Issues: Poor integration between expense management, accounting, and payroll systems can lead to reconciliation problems.
- Fraud Risk: Without robust controls, there's a risk of fraudulent expense claims.
- Mobile Accessibility: Lack of a user-friendly mobile interface for submitting expenses can hinder timely submissions.
- Journal Line Association: Workday links journal entries to expense reports at the header level, not at the line level, preventing direct tracing of a specific journal line back to its corresponding expense report line in standard reporting.
- Correction Restrictions: You can't use the Correct action on an approved expense report if the report:
    - Has been paid and worktag balancing is enabled.
    - Is associated with project billing transactions that have a *Ready to Bill* status.
    - The expense tax details are included on a tax declaration that hasn't been canceled.
- Cancellation: You can't cancel or rescind the business process once it has been initiated. You can cancel the expense report if security allows, but you can't cancel the in-progress business process instance.
- Organizational Definitions: The business process definition for the Expense Report Event can only be based on Company, Company Hierarchy, or Supervisory organizations. It does not support definitions based on Cost Center.
- Add Approver Functionality: The Add Approver option is not available on steps that use the Send Back Expense Lines action.
- Delegate Visibility: When a delegate is acting on behalf of another user (the delegator), they can't see the Business Process tab on the expense report to check the approval status.
- Draft Status via Integration: When using the *Submit_Expense_Report* web service, there is no parameter to save the expense report in a *Draft* status. If the data is valid, the business process is automatically initiated.

Common Business Process Workflows and Guidelines

A typical Expense Report Event workflow often follows this general pattern:

1. Creation/Initiation: An employee submits an expense report.
2. Review: Can precede or follow approval steps, often before final processing. The report is routed to a central team, such as expense partners or auditors. The reviewer can make corrections directly to the report before sending it. They can also return it to the employee.
3. Approval: Can precede or follow review steps. The report is routed to one or more approvers. Example: manager, finance department.

Once the business process completes and the expense report is approved, it's processed for reimbursement and data is archived.

The approval workflow for an expense report can range from simple to complex, depending on the organization's policies, approval limits, and audit requirements.

Path 1: Simple Approval

This is the most straightforward workflow, typically used by smaller organizations for expenses that fall below a certain threshold.

A: Initiation > B: Approval > C: Completion

Path 2: Simple Approval with Manual Advance

For small organizations, this is another direct workflow. Expenses below a certain threshold are manually advanced.

A: Initiation > B: Manual Advance > C: Approval > D: Completion

Path 3: Hierarchical and Audit Approval

This is a very common pattern that includes manager approval followed by a secondary review from the finance or audit department, often based on specific criteria.

A: Initiation > B: Approval > C: Action (Conditional on Audit Expense Report)> D: Completion

Path 4: Complex Project-Based and Multi-Level Approval

This workflow is for expenses that need approval from multiple roles, like a project manager and a cost center manager. Depending on the total amount, additional approval tiers may also be required.

A: Initiation > B: Approval (Conditional by Project Manager) > C: Approval (by Manager) > D: Approval (Conditional by Director for high amounts) > E: Completion

Path 5: Complex with Delayed Review

This workflow is used when expense approvals are required from multiple roles, such as a project manager and a cost center manager. The review process is delayed, and there can be multiple tiers of approval based on the total expense amount.

: Initiation > B: Review (Maintain Delay) > C: Review (by Manager) > D: Approval (Conditional by Director for high amounts) > E: Completion

Path 6: Complex with Delayed Approval

This workflow is used when expense approvals are required from multiple roles, such as a project manager and a cost center manager. The approval process is delayed, and there can be multiple tiers of approval based on the total expense amount

A: Initiation > B: Review (Approval by Manager) > C: Approval (Maintain Delay) > D: Approval (Conditional by Director for high amounts) > E: Completion

Workflow Steps

Here are some common step types found in an Expense Report Event business process, along with their characteristics:

Initiation	• Step Order: Usually the first step.
	• Group: Performed by Employee, Contingent Worker As Self, or Data Entry Specialist.
	• Security Domain: The security domains that the role-based security group should have access to:
	  ◦ Employee/Contingent Worker as Self: View and Modify access to *Self-Service: Expense Report*, *Self-Service: Expense Report Attachments*, and *Self-Service Receipt Attachments* domain.
	  ◦ Data Entry Specialist: View and Modify access to the *Process: Expense Reports* domain that enables data entry specialists to create and submit expense reports on behalf of others.

	• Specify:
	  ◦ Form Definition: What fields are visible and required (Example: expense date, amount, category, description, attachments).
	  ◦ Data Validation Rules: Rules to ensure data integrity (Example: amount must be a number, date must be in a valid range).
	• Step Type Guidelines:
	  ◦ Best Practices: Provide a user-friendly interface. Allow users to save drafts. Include clear guidance on the documentation needed, such as receipts.
	  ◦ Use Cases: Employee submitting their own expense report or an administrator submitting an expense report on behalf of another employee.
	  ◦ Example: An employee logs into the system, fills out an expense report form, attaches receipts, and clicks Submit.
	• Condition Rule Guidelines:
	  ◦ Best Practices: Keep forms concise. Provide clear instructions and error messages. Use dropdowns for consistent data entry.
	  ◦ Use Cases: Add condition rules to enable or disable fields based on previous selections. Example: show mileage fields only if you select the Mileage category. Automatically populate fields. Example: employee ID.
	  ◦ Example: When you have an expense category of travel, then travel dates and destination fields are required. Add a rule on this step:
	`IF ExpenseCategory = Travel THEN REQUIRE TravelDates, Destination`

Action	• Step Order: Usually after the first step. • Group: Performed by Manager, Expense Partner, Project Manager, or a custom-defined role. • Security Domain: The security domains that the role-based security group should have access to: ◦ Manager/Expense Partner/Project Manager: *Process: Expense Report-*

Cancel, *Process: Expense Report- Change*, *Process: Expense Report - Core*, *Process: Expense Report - Other*, *Process Expense Report - View*, *Process: Expense Report Work Area* domains

- Specify: Select the specific action to be performed. Common actions include:
    - Approve Expense Report: Allows the assigned role to approve, deny, or send back the entire expense report.
    - Approve Expense Report - Send Back Lines: Allows the assigned role to approve or deny the entire report, or send back individual lines for correction while approving the rest.
    - Initiate Expense Report Intercompany Event: Triggers the sub-business process for intercompany expense approvals.
    - Review Expense Report: Allows the assigned role to edit, approve, deny, or send back the entire expense report.
    - Review Expense Report - Send Back Lines: Allows the assigned role to edit the expense report, approve or deny the entire report, or send back individual lines for correction while approving the rest.
- Step Type Guidelines:
    - Best Practices:
        - Granular Control with Line-Level Send Back: For roles that frequently find minor errors on large expense reports, use the Approve Expense Report - Send Back Lines or Review Expense Report - Send Back Lines steps option. It prevents the entire report from being held up due to a single incorrect line and streamlines the reimbursement process for the employee. This allows the approver to send back individual lines for correction while approving the remainder of the report. This practice prevents minor errors from delaying the reimbursement of the entire expense report.
        - Add Approver Limitation: When you use an Action step with the Send Back Lines capability, the user performing that step will

not have the ability to use the Add Approver function. If ad-hoc approvals are a critical part of your process, consider using a standard Approval step instead.

- Maintain Financial Oversight After Report Edits: If a Review Expense Report step is included where a reviewer can change amounts, consider adding a subsequent Approval step for the employee's manager immediately after it. This ensures the manager responsible for the budget provides final approval on the updated amounts before the process completes.
- Streamlining Workflow for Corrected Reports with Auto-Approval: To speed up the final approval, prevent a report from being routed to the same manager multiple times after the manager approves an expense report and sends back a single line by configuring advanced routing on your approval steps to exclude prior approvers. Example: Add two sequential approval steps. First step for the Manager, in the Action step select Approve Expense Report - Send Back Lines. Then second step for the Cost Center Manager, add a standard Approval step that has an advanced routing rule configured to Exclude Prior Approvers.
- Manage Intercompany Transactions: On the Action step, add the Initiate Expense Report Intercompany Event subprocess for approvals when an expense line includes a different company than the one in the expense report's header. This ensures that an approver for the affiliate company receives an approval task to review just that intercompany line item. After the line is approved, the main business process continues, ensuring proper accounting.

	• Condition Rule Guidelines:
	  • Best Practices:
	    • Test your condition rules thoroughly to ensure they are evaluating correctly.
	    • Avoid overly complex rules that are difficult to maintain.
	    • Use Action steps when the user needs to do more than just approve or deny, such as editing the expense report or sending back individual lines.
	    • Know that the Add Approver functionality is not available on steps that use the Send Back Lines actions.
	  • Use Cases:
	    • Use a Review Expense Report step for an expense partner to allow them to correct any errors before sending it for final approval.
	    • Route expense reports for approval based on their risk score. Example: Add a condition rule where Risk score > 60 and risk score <= 0.
	    • Route to a specific approver only if the expense report total exceeds a certain threshold. Example: Add a condition rule where Expense Report Total Amount > 500
	    • Skip a review step if the expense report only contains certain types of expenses (Example: mileage).
	    • Trigger a tax review only if the expense report contains recoverable taxes.

Approval	• Step Order: Typically follows data entry. There can be multiple approval steps in sequence or parallel. • Group: Performed by Manager, Department Head, Project Manager, Finance Approver, HR Partner such as for expense for relocation.

- Security Domain: The security domains that the role-based security group should have access to:
  - Manager/Department Head/Project Manager/Finance Approver/ Human Resources: *Process: Expense Report - Cancel*, *Process: Expense Report- Change*, *Process: Expense Report - Core*, *Process: Expense Report - Other*, *Process Expense Report - View*, *Process: Expense Report Work Area* domains.
- Specify: Select the specific action to be performed. Common actions include:
  - Approval Authority: Defining who can approve based on amount, expense type, department, or project.
  - Reassignment Options: Ability to reassign approval to another individual.
  - Delegation Rules: Allowing approvers to delegate their approval authority.
  - Approval/Rejection Actions: Approve, Reject, Send Back for Correction.
- Step Type Guidelines:
  - Best Practices:
    - Provide approvers with a clear dashboard of pending approvals. Allow comments and justifications for approval or rejection. Set service level agreements (SLAs) for approval times.
    - Use the Approval step type when the user only needs to approve, deny, or send back the entire expense report.
    - If you need the ability to add ad-hoc approvers, use the Approval step type.
  - Use Cases:
    - The manager reviews an employee's expense report for adherence to company policy and budget. Finance department reviews it for compliance and proper expense codes.
    - A multi-level approval process for high-value expense reports.
- Condition Rule Guidelines:
  - Best Practices:
    - Clearly define approval hierarchies and thresholds.

Provide approvers with all necessary information including report details, attached receipts.
- Leverage the Exclude Prior Approvers option in the advanced routing to prevent a user from having to approve the same expense report multiple times.
- Use approval chains to route to multiple levels of management.
- Route to a specific approver based on the cost center or other worktags on the expense report.

- Use Cases: Routing to specific approvers based on expense amount, expense type, or project code. Skipping an approval if the amount is below a certain threshold. Example: To route to Department Head after Manager Approval for expenses that are > $1000, set a condition:

```
IF TotalExpenseAmount >
 1000 THEN NEXT_STEP =
 DepartmentHeadApproval
```

Consolidated Approval Step

- Order: Usually after the first step. Example: "b", "c", "d".
- Group: Performed by multiple project managers who might need to approve different lines on the same expense report.
- Security Domain: The security domains that the role-based security group should have access to:
-
  - Project Managers: *Process: Expense Report- Cancel*, *Process: Expense Report- Change*, *Process: Expense Report - Core*, *Process: Expense Report - Other*, *Process Expense Report - View*, *Process: Expense Report Work Area* domains.
- Specify: Not applicable for the Consolidated Approval step type.
- Step Type Guidelines:
  - Best Practice: Ensure that you assign appropriate roles to the projects so that the approvals are routed correctly.
  - Use Case: An expense report has lines charged to three different projects. The Consolidated Approval step will route the expense report to all three project managers simultaneously. The business process will only proceed

	once all three have approved their respective lines.
	• Condition Rule Guidelines:
	  • Best Practice: Use this step type when you have multiple approvers who need to approve different parts of the same transaction.
	  • Use Case: Initiate the consolidated approval step if the expense report contains project-related expenses. Example: To route to project managers if Project worktag is present, set a condition:
	`Project on Expense Report Line is not empty`

Review	This is an Action step. You can select 1 of the review options in the Specify column.
	• Order: Can precede or follow approval steps, often before final processing.
	• Group: Performed by Finance Reviewer, Auditor, Compliance Officer.
	• Security Domain: The security domains that the role-based security group should have access to:
	  • Finance Reviewer/Compliance Officer: *Process: Expense Report- Cancel*, *Process: Expense Report- Change*, *Process: Expense Report - Core*, *Process: Expense Report - Other*, *Process Expense Report - View*, *Process: Expense Report Work Area* domains.
	  • Auditor: *Process: Expense Report Work Area*, *Process: Expense Report - Reporting* domains.
	• Specify:
	  • Review Expense Report : Allows the user to edit, approve, deny, or send back the entire expense report.
	  • Review Expense Report - Send Back Lines: Provides all the capabilities of the above, but also allows the user to send
	  • Checklist Definition: Predefined items to verify. Example: valid receipts for all items, correct expense codes, policy compliance.
	  • Flagging Discrepancies: Ability to mark items for further investigation.

- Step Type Guidelines:
  - Best Practices: Provide clear indicators of compliance status. Allow for notes and annotations during the review.
  - Use Cases:
    - Finance department verifying that all receipts match reported expenses.
    - An internal auditor performing a sample audit of processed reports.
  - Example: Finance clerks review all approved expense reports before payment. They cross-reference receipts with line items, ensure the correct general ledger codes and cost centers are used, and verify policy adherence. If an issue is found, they might send the report back to the employee or approver for clarification.
- Condition Rule Guidelines:
  - Best Practices:
    - Define clear review criteria. Provide tools for easy comparison of submitted data with policy.
    - Use an Approve Expense Report - Send Back Lines step for a manager to allow them to approve the majority of an expense report while sending back a single problematic line for correction.
    - Use a Review Expense Report step for an expense partner to allow them to correct any errors before sending it for final approval.
  - Use Case: Initiate a detailed review if specific expense categories are present, such as high-risk categories. To flag for manual review by Finance Reviewer when Receipt Attached is No for any line item, set a condition:

```
IF ANY
 LineItem.ReceiptAttached
 == "No" THEN
 FLAG_FOR_REVIEW =
 FinanceReviewer.
```

Completion	This step signifies that the main workflow is finished. Once the completion step is executed, the

expense report is considered fully approved, and subsequent steps, such as, integrations, archiving, or notifications can run without holding up the core process.

Review the steps and identify which one should represent the final, required action for the expense report to be considered approved. This is often the final approval step in the sequence. Locate the row for this step in the grid, and from the related actions menu of that step, select Business Process > Set to Completion.

Note: A business process can only have one completion step. If another step is already marked as the completion step, Workday will automatically uncheck it and apply the designation to the step you have just selected.

Integration

Integration involves the seamless transfer of data between the expense management system and other enterprise systems to ensure data consistency and efficiency.

- Step Order: Integrations can occur at multiple steps within the workflow. This step usually occurs after all approvals are complete, but before the process completes.
- Group: Performed by the system and requires you to assign a pre-configured Integration System User (ISU) that has the necessary security permissions to run the integration.
- Specify: Select the specific integration system to run. This could be a pre-built Workday connector, like one for a corporate card provider, or a custom-built integration using Workday Studio, Enterprise Interface Builder (EIB), or Core Connectors.
- Step Type Guidelines:
    - Best Practices:
        - Place the integration step at the appropriate point in the business process. For example, if you are sending data to a payment system, the integration should run after all approvals are complete.
        - Use the Determine Value at Runtime option in the integration parameters to pass data from the business process to the integration. This makes integration more dynamic and reusable.
        - Ensure the Integration System User has the necessary security permissions for the data the integration needs to access.
        - Accurately map expense categories to General Ledger (GL) accounts.
        - Implement real-time or scheduled batch integrations using APIs.
        - Thoroughly test your integrations in a sandbox environment before deploying them to production.
    - Use Cases:
        - Sending data to a downstream system: After an expense report is fully approved, you can use an integration step to send the data to a downstream system, such as a data warehouse for reporting, a travel booking system, or a project management tool.
        - Initiating a payment process: If you are using an external system for payments, you can use an integration step to send the approved expense report data to that system to initiate the payment process.
        - Archiving data: You can use an integration to send a copy of the expense report and its attachments to an external archiving system for long-term storage.

- Condition Rule Guidelines:
    - Best Practices:
        - Use a condition rule to prevent the integration from running unnecessarily, which can improve performance and reduce noise in your integration logs.
        - Use clear and descriptive names for your condition rules to make the business process easier to understand and maintain.
    - Use Case: Initiate the integration under specific circumstances, such as:
        - When an expense report is approved for payment or when it contains a specific project worktag for an integration that posts data to an external project management system.
        - Only run an integration to a downstream system if the expense report is for a specific company or region.
        - Run an integration to an external system for auditing purposes only if the expense report total exceeds a certain amount.
        - Trigger a specific integration based on the types of expense items on the report.
            - Budgeting System Integration: Updating budget consumption based on approved expenses.
            - Credit Card Integrations: Workday can integrate with providers like AMEX, Mastercard, and Visa to import credit card transactions directly, which workers can then add to their expense reports.
            - HR System Integration: Syncing employee data (Example: new hires, terminations, reporting lines) to ensure correct approval workflows.
            - Payroll Integration: If expenses are reimbursed via payroll, integrating with the payroll system.
    - Examples:
        - After an expense report is approved by Finance, the system automatically creates journal entries in the ERP's General Ledger module.
        - An organization using a third-party travel booking tool sends booking data to Workday via the *Import Travel Booking Records* web service, making the travel record available to the employee for expense report creation.

Notifications

System Notifications

System notifications are default alerts generated by Workday for business process events. You can view all system notifications on the Notifications tab of the business process. Workday allows you to disable a specific notification, though it's often better to manage notification preferences at the user level or use custom notifications for more targeted alerts. See Configure Business Process System Notifications.

Note: Global notification settings are managed in the Edit Tenant Setup - Notifications task.

Custom Notifications

You can create custom notifications that can initiate on any step of the business process to alert users about events, required actions, or status changes. To create a notification, navigate to the respective step in your business process definition and from the related actions menu of that step, select Business Process > Add Notification. See Create Custom Notifications.

- Guidelines and Best Practices:
  - Be Clear and Actionable: The subject line should be direct (Example: "Action Required: Approve Expense Report"). The body should clearly state what happened and what the recipient needs to do next.
  - Target the Right Audience: Only send notifications to roles that need the information. Over-notifying users leads to them ignoring all alerts. Use specific security groups instead of broad ones.
  - Use Dynamic Fields: Include relevant data like Expense Report ID, Total Amount, and Worker to provide context so the user doesn't have to click into the task to understand the request.
  - Avoid Notification Fatigue: Don't configure a notification for every single step. Focus on key events: submission, send back, final approval, and exceptions.
  - Manage by Exception: Use condition rules to trigger notifications for exceptional cases, such as reports over a certain dollar amount, those that have been waiting for approval for more than a few days, or those that are missing receipts.
- Use Cases:
  - Scenario 1: A user submits a high value expense report. You want to alert the Cost Center manager and the Finance department immediately. Example: On the Manager's approval step, add a notification with a condition rule that checks if the Expense Report Total Amount > $10,000. Specify the Cost Center Manager, Finance Partner for the Recipient.
  - Scenario 2: A manager sends an expense report back to the employee for correction. You want to alert the employee. Example: On the approval or review step, configure a notification for the Send Back action. Specify the Initiator for the Recipient.
  - Scenario 3: The employee wants to receive a confirmation for when their expense report is fully approved and is pending payment. Example: On the very last step of the business process, add a notification that triggers On Entry. Specify the Initiator for the Recipient.

Issues and Solutions

Issues	Solutions
Notification is not being sent.	1. Check the Business Process Definition: Ensure the notification is configured on the correct step and is marked as Active. 2. Verify Step Execution: Check the business process history for the transaction. Was the step the notification skipped due to a condition rule? If the step doesn't run, the notification won't either. 3. Check Notification Condition: Does the notification itself have a condition rule that is not being met? 4. Check Recipient's Profile: If sending an email, confirm the intended recipient has a valid work email address in their Workday profile.
Notification is sent to the wrong person.	1. Review Recipient Configuration: In the business process definition, check the Recipient field for the notification. Is it configured for the correct security group (Example: Manager, Initiator, Cost Center Manager)? 2. Check Role Assignments: Verify the role assignment for the person who incorrectly received the notification. They may be unintentionally included in the recipient security

Issues	Solutions
	group. For example, is a worker's former manager still assigned as their manager for some reason?
Notification is missing information or contains blank fields.	1. Check Dynamic Fields: Edit the notification text and ensure you are using the correct, system-provided fields for the data you want to display. 2. Verify Data Timing: The data must exist on the business object at the time the notification triggers. For example, you cannot include [Approver's Name] in a notification that fires before the approval step has been completed, as the value would be blank.

Related Information

Reference

FAQ: Business Processes on page 1201

Reference: Security Domains for the Expense Report Event Business Process on page 1197

Concept: Hire Event Business Process Guidelines

Overview

The Hire business process (BP) is a foundational workflow in Workday Human Capital Management (HCM) that orchestrates the sequence of tasks, approvals, and system actions you need to bring a new employee into the organization. It controls the:

- What (steps and subprocesses)
- Who (security groups responsible for each step)
- When (the order of operations) for a hiring event

A properly configured Hire business process ensures data accuracy, involves the correct stakeholders at the appropriate times, and automates tasks like account creation and notifications.

Each Hire process is an instance of a business process definition. It serves as a central hub that connects recruiting, compensation, benefits, and core (human resources) HR data, ensuring a seamless transition from candidate to employee. While Workday provides a default definition, most organizations create multiple, rule-based definitions tailored to different populations (by country, worker type, or supervisory organization).

These are the sections this topic:

- Subprocesses
- Prerequisites
- Process Initiators
- Limitations
- Common Workflows
- Workflow Steps
- Integration
- Notifications
- Issues and Solutions

Subprocesses

The Hire business process can include several subprocesses to handle specific tasks.

- Propose Compensation Hire: This subprocess determines the new hire's salary and other compensation components.
- Create Workday Account: This generates the new hire's Workday account, giving them access to the system.
- Onboarding: You can trigger this process after the hire is complete to manage new hire tasks such as:
  - Completing tax forms.
  - Reviewing documents.
  - Enrolling in benefits.
- Background Check: This process is applicable only if the new hire isn't from Recruiting and you want to check the background status in Workday.

Prerequisites

You must meet these prerequisites in the target supervisory organization before you can initiate a Hire transaction:

- Security: Configure the business process security policy to grant specific security groups permission to these action steps:
  - Initiating Actions: Determine who can start the Hire process. Typical security groups include Recruiter, HR Administrator, and HR Partner.
  - Review and Approval Steps: Determine who can approve the hire transaction. Typical security groups include Manager, HR Partner, and Compensation Partner.
  - View All: Determine who can view the in-progress or completed hire transaction. Typical security groups include HR Administrator, HR Auditor, and Implementers. Grant View All permission to the roles that can initiate the business process to ensure all validations run correctly
- Staffing Model: The supervisory organization must have a staffing model assigned:
  - Position Management: An open, available, and approved position must exist in the supervisory organization. You initiate the Hire action against this specific position.
  - Job Management: You can optionally configure hiring restrictions on the supervisory organization. If not configured, you define the job details when hiring the worker into the Job Management organization. See Concept: Staffing Models.
- Job Profiles: Create the necessary job profiles with details such as:
  - Job description
  - Management level
  - Compensation Grade
  - Pay Rate Type
  - Other qualifications
- Pre-Hire Tracking: If you track candidates before they are formally hired, configure pre-hire statuses, evaluation methods, and recruiting sources.
- Edit the Hire Business Process: Define the steps, conditions, and notifications for the Hire business process. This includes configuring service steps like Create Workday Account.
- Configure Optional Fields: Determine which optional fields in the Hire business process to hide, make view-only, or require for specific security groups.

Process Initiators

You trigger the Hire business process when a person with the appropriate security permissions initiates one of the Hire Employee tasks. Workday provides several variations of this task, enabling you to select the one that best fits your process.

Example: Some task versions provide enhanced search capabilities to prevent creating duplicate records by searching for existing pre-hires, former workers, or students. See Concept: Hire Employee Initiating Actions.

You can initiate the process from:

- The search bar by typing Hire Employee.
- The related actions menu of a Job Requisition.
- The related actions menu of a Supervisory Organization.
- The related actions menu of an unfilled Position.
- The Ready for Hire status from the Offer or Employment Agreement Business Process.

Limitations

- Corrections and Integrations: Event-driven integrations that you configure to trigger from the Hire process only re-trigger for corrections you make to the top-level Hire event. Corrections you make only within a subprocess, won't re-trigger the integration. Example: Correcting compensation in Propose Compensation Hire after the main hire is complete,
- Configuration Complexity: The high degree of configurability means the initial setup can be complex and requires a thorough understanding of the hiring processes in your organization.
- Send Back Option: You can send a business process back to the Initiation or Review step for corrections using the Send Back action. This action is accessible during the review or approval stages of the business process definition, provided the process isn't complete.
- Onboarding Distinction: Distinguish between the Hire process and Onboarding. The Hire process focuses on getting the employee into the system, while Onboarding is about the new hire experience and completing post-hire tasks.
- Autocomplete Functionality: Autocomplete doesn't support send-backs in the business process workflow. Service steps always run, but Workday skips any notifications associated with those service steps. See Setup Considerations: Autocomplete Staffing Events.
- Corrections to completed Hire events: These don't automatically re-trigger associated events, such as benefits enrollments. Depending on the specific changes made, you might need to manually initiate certain subprocesses to ensure the worker record updates accurately.
- Correct Worker Start Date: You can't use this business process for contingent workers, and you can't rescind it once submitted.

Common Business Process Workflows and Guidelines

These are common workflow configuration paths for the Hire Event business process, with the steps listed in their typical order

Path 1: Standard Workflow Configuration

This is the most common configuration, representing a straightforward, linear process for a typical employee hire without complex pre-hire requirements.

A: Initiation > B: Action (Propose Compensation for Hire) > C: Action (Request One-Time Payment) > D: Service (Create Workday Account) > E: Action (Assign Pay Group) > F: Action (Complete Onboarding Tasks) > G: Completion (Hire Completion Step)

Path 2: Hire with Background Check Subprocess Configuration

This path integrates a formal background check as a required, gating step in the process. The hire cannot proceed until the background check is successfully completed, ensuring compliance with hiring policies.

A: Initiation > B: Action (Enter Personal Information) > C: Action (Background Check) > D: Action (Propose Compensation for Hire) > E: Action (Assign Pay Group) > F: Approval (Review Hire and BGC Results) > G: Completion (Hire Completion Step)

Path 3: Hire with Integrated Onboarding Workflow Configuration

This configuration path connects the Hire process to other critical onboarding subprocesses, creating a seamless end-to-end onboarding experience for the new hire and internal teams.

A: Initiation > B: Action (Propose Compensation for Hire) > C: Action (Request One-Time Payment) > D: Service (Onboarding Plan Assignment) > E: Action (Onboarding Setup) > F: Service (Create Workday Account) > G: Action (Assign Pay Group) > H: Action (Onboarding)

Path 4: Hire with Union or Collective Agreement Configuration

This path is for organizations where new hires must be assigned to a collective agreement, which can influence their compensation, benefits, and other job details.

A: Initiation > B: Action (Propose Compensation for Hire) > C: Action (Assign Collective Agreement) > D: Action (Assign Pay Group) > E: Approval (Union Steward Review) > F: Approval (Manager Review) > G: Completion (Hire Completion Step)

Path 5: Autocomplete

This path streamlines your hiring process and reduces manual data entry for high-volume, standardized hiring processes where minimal manual intervention is required. Example: seasonal workers, retail staff.

Hire BP > Edit Definition > Enable Autocomplete

Enabling autocomplete bypasses certain steps in the business process, including approvals, to-do items, and review steps. If your process relies on these steps, consider the implications before using this workflow.

Note: The success of Autocomplete depends on the accuracy and completeness of the data entered during the recruiting process. If required fields for the Hire event aren't populated from Recruiting or through Staffing Field Defaults, the process will not autocomplete. It will revert to the standard manual workflow.

Workflow Steps

These are the common step types used to build the Hire business process workflow:

Initiation	• Step Order: Always the first step in any business process (labeled 'A').
	• Group: Recruiters, HR Partners, or HR Administrators, or as part of Recruiting (Offer or Employment Agreement) or Integration, also by a Recruiter. Its setup is managed in the Hire Business Process Security Policy.
	• Specify: Not applicable. This step launches the process.
	• Step Type Guidelines:
	    • Best practice: Use the Hire Employee task with enhanced search capabilities to avoid creating duplicate records. Train users on how to search for existing pre-hires or former workers before creating a new record.
	    • Use case: This step begins the Hire workflow. The initiator enters the core information required to identify the pre-hire and the position they will fill, such as their name, the job requisition, and the planned hire date.
	    • Example: A recruiter needs to hire a candidate for an open position.

They use the "Hire Employee" task and search for the candidate name. They find that the candidate was a former intern and has a pre-hire record in the system. The recruiter selects the existing record to initiate the hire process, which pre-populates some of the candidate information.

- Condition Rule Guidelines: A condition rule in the initiation step serves as a validation mechanism to ensure the completeness of information that the initiator provides:
    - Best Practices: Keep initiation security straightforward. Use role-based security to grant initiation rights to the appropriate users.
    - Example: To only allow users based in the US to initiate the standard Hire process, add this rule on the security policy: User's Location is 'USA'.

Action	• Step Order: Place anywhere after the Initiation step and either before or after the completion step.
	• Group: Any role that needs to enter or review data as part of the workflow, such as a Compensation Partner, HR Partner, Payroll Administrator, or the Employee as Self.
	• Specify: Specify the subprocess that the step will trigger such as Propose Compensation Hire, Change Personal Information.
	• Step Type Guidelines:
	    • Best Practice: Use an action step to route a questionnaire to the new hire.
	    • Use Case: One of the most common step types used to call another business process (a subprocess) to gather specific or additional information from the new hire.
	    • Example: An action step labeled Complete New Hire Questionnaire is routed to the new hire inbox.
	• Condition Rule Guidelines:
	    • Best practice: Use condition rules to streamline the process and ensure users only see relevant tasks. This

	avoids confusion and unnecessary work. • Use case: To dynamically run steps based on data. • Example: Trigger a Request One-Time Payment action step only if a sign-on bonus is being offered.

To Do	• Step Order: You can add in any order in the business process.
	• Group: Any role. Often assigned to the Employee as Self, Hiring Manager, or support teams like IT Support or Facilities.
	• Specify: You can enter instructions (using rich text and hyperlinks)
	• Step Type Guidelines: Use to assign a simple task or reminder that doesn't involve data entry on a Workday screen but rather serves as a checklist item.
	• Condition Rule Guidelines:
	    • Best Practices: Write clear, actionable instructions. Use due dates to help users prioritize tasks. Group related To Do's together in the process flow.
	    • Use Case: To assign tasks conditionally.
	    • Example: On a To Do for the Hiring Manager to Request a Corporate Credit Card, you can add this condition rule: Job Level is Director or higher.

Approval	• Step Order: You can typically place it after all major data entry steps are complete and before the final completion step. • Group: A role with the authority to approve the transaction, such as a Hiring Manager, Management Level +1 (the manager's manager), or an HR Manager. • Specify: You can configure an approval chain, which routes the transaction up a management hierarchy until a certain level is reached. • Step Type Guidelines: This step acts as a formal gate to validate a transaction. The approver can approve, send back (to a prior step for correction), or deny the hire. This ensures oversight and compliance with company policies. • Best Practice: Place an Approval step after the Propose Compensation step

	and route it to the Hiring Manager's Manager.
	• Use Case: Getting a manager to sign-off on a new hire compensation package.
	• Example: After the HR Manager proposes a compensation package, the business process routes an approval task to the department head for their review and sign-off.
	• Condition Rule Guidelines:
	  • Best Practices: Avoid creating overly long or complex approval chains, as this can slow down the hiring process. Use condition rules to bypass approvals for standard, non-exception hires.
	  • Use Case: To require additional approvals for exceptions.
	  • Example: On an approval step for a Finance Partner, you can add this condition rule: Hire is for a Finance Department AND Proposed Annual Salary > 150,000 USD.

Service	• Step Order: You can place it anywhere, but critical services like Create Workday Account are usually placed after the final approval and just before or on the completion step.
	• Group: The system (Workday). In Workday, this "system" is a specific, configurable security principle called the Business Process Execution User.
	• Specify : You select from a list of delivered Workday background processes.
	• Step Type Guidelines: Used to execute an automated, system-level action without manual intervention. The most common use case in the Hire business process is the Create Workday Account service, which generates the new user account and allows them to sign in to Workday.
	• Condition Rule Guidelines:
	  • Best Practices: Understand the function of each service before adding it to a business process. Place service steps logically such as create the Workday account before assigning user-based security roles.
	  • Use Case: To control when a system action occurs such as prevent the

	Create Workday Account service from running until the hire date is near. • Example: On the Create Workday Account service step, add this rule: (Hire Date minus Today's Date) is less than or equal to 7. This ensures the account isn't created more than a week before the start date.
Completion	This step signifies that the main workflow is finished. Once the completion step is executed, the hire is considered fully approved, and subsequent steps, such as, integrations, archiving, or notifications can run without holding up the core process. Review the steps and identify which one should represent the final, required action for the hire to be considered approved. This is often the final approval step in the sequence. Locate the row for this step in the grid, and from the related actions menu of that step, select Business Process > Set to Completion. Note: A business process can only have one completion step. If another step is already marked as the completion step, Workday will automatically uncheck it and apply the designation to the step you have just selected.

Autocomplete	• Best practices:
	  • While autocomplete is designed to skip many steps, there might be certain actions you always want to occur. Use Route Normally to specify which steps should execute even when the rest of the process autocompletes. Integrations and service steps always route normally.
	  • Ensure that all required fields for a successful hire are correctly mapped and auto-populated from Recruiting into the Hire event. Leverage Staffing Field Defaults to pre-populate data where possible.
	
	  Example: Hire Reason is a required field for job changes. To ensure this field is always populated, configure the Offer business process to require it.
	  • You can also enable autocomplete on various subprocesses of the Hire event, such as Assign Pay Group,

Propose Compensation Hire, and Request One-Time Payment.

- If you are using a consolidated Change Job template for internal hires, you must configure autocomplete for all subprocesses within that template for the parent process to do so.
- To apply autocomplete selectively, use rule-based business process definitions. Then you can specify the conditions under which autocomplete should trigger.

  Example: Create a rule that enables Autocomplete for retail positions but not for executive-level hires that require more manual oversight and approvals.
- Since moving a candidate to the Ready for Hire status instantly triggers the Autocomplete process, you might need to adjust your recruiting workflow. Consider moving candidates to Ready for Hire closer to their actual start date to maintain flexibility.
- Ensure that the security groups responsible for moving candidates to Ready for Hire status (Recruiter or Primary Recruiter) have the necessary permissions to initiate and complete the Hire event. This involves configuring the business process security policy for the Hire process and the dynamic completion steps in the Job Application business process.

Integration

The integration setup primarily utilizes Workday's Event-Driven Integration for Third-Party Payroll. It sends hire information to your third-party payroll vendor instantly when the Hire business process is complete, rather than waiting for a scheduled primary integration run. You enable this service on your primary Payroll Effective Change Interface (PECI) connector. It configures steps on the Hire business process to automatically send worker events from Workday to your third-party payroll vendor. The vendor validates the data and returns any errors for immediate correction.

- Step Order: Integrations can occur at multiple steps within the workflow. This step usually occurs after all approvals are complete, but before the process completes.
- Group: Performed by the system and requires you to assign a pre-configured Integration System User (ISU) that has the necessary security permissions to run the integration.
- Specify: Select the specific integration system to run. This could be a pre-built Workday connector, like one for a corporate card provider, or a custom-built integration using Workday Studio, Enterprise Interface Builder (EIB), or Core Connectors.
- Step Type Guidelines:
  - Use cases: Meet government regulations that require same-day reporting for new hires. Provide immediate payroll processing information for new employees, ensuring they are set

up correctly in the third-party payroll system without delay. Allow the third-party payroll vendor to validate information and return any errors to you for immediate correction, reducing payroll errors.

- Best practices: Ensure you have built and tested the two required endpoints (one for delivery, one for retrieval) with your payroll vendor before implementation. Test the integration thoroughly in a sandbox environment. Assign the review step to a security group that is actively monitoring tasks and can resolve any potential integration errors promptly.
- Example: To add the steps to a Hire business process definition:

    1. Access the Hire business process definition and select Business Process > Edit Definition .
    2. Ensure you have an Assign Pay Group step that it is marked as a completion step.
    3. Add a row with these details: Order: c, Type: Service, Specify: Transmit Employee Data to Third Party Payroll
    4. Add another row with these details: Order: d, Type: Action, Specify: Review Event Driven Integration for Third Party Payroll, Group: Payroll Administrator
    5. Select OK to save the changes.

- Condition Rule Guidelines:

    - Best practices: Avoid configuring business process steps with audited entry conditions. This can create scenarios where the event-driven integration doesn't run as expected. To control execution, use the specific report field designed for this purpose.
    - Use Case: A common use case for a condition rule is to prevent the integration from running for hires with a future effective date. This can be useful if your downstream system can't handle future-dated transactions.
    - Example: To skip future-dated hires, create a condition rule on the Transmit Employee Data to Third Party Payroll step. Use the report field Is Event Driven Integration Transaction Future Effective in the rule's condition. Configure the step to run only when the value of this field is "No".

Notifications

System Notifications

System notifications are default alerts generated by Workday for business process events. You can view all system notifications on the Notifications tab of the business process. Workday allows you to disable a specific notification, though it's often better to manage notification preferences at the user level or use custom notifications for more targeted alerts. See Configure Business Process System Notifications.

Note: Global notification settings are managed in the Edit Tenant Setup - Notifications task.

Custom Notifications

You can create custom notifications that can initiate on any step of the business process to alert users about events, required actions, or status changes. To create a notification, navigate to the respective step in your business process definition and from the related actions menu of that step, select Business Process > Add Notification. See Create Custom Notifications.

- Guidelines and Best Practices:

    - Inform the hiring manager once the hire process is successfully completed.
    - Create a custom notification that is triggered upon the completion of the Hire business process. Personalize the email with the new hire name, start date, and manager name.
    - Notify the IT department about a new hire so they can prepare the necessary hardware and software.

- Use Cases:
    - Manager Notification on Hire Completion
    - Sending a welcome email to the new hire
    - IT Department Notification for Equipment Provisioning
- Examples:
    - Configure a custom notification to trigger on the completion step of the Hire BP, sent to the Hiring Manager security group. The message can include the new hire name, Employee ID, start date, and position.
    - Configure a notification with the subject "Welcome to the Team, [New Hire Name]!". The body of the email includes details about their first day, a link to the company new hire portal, and contact information for their manager.
    - Configure a custom notification on the Hire BP, sent to a specific security group for the IT team. The notification triggers on the entry of a specific step and includes details like the new hire name, location, and job title.

Issues and Solutions

This table lists some common issues with the Hire Event business process and their causes and available solutions.

Issue	Cause and Solution
Review or Approval Doesn’t Work When Using a Consolidated Template	Cause: A consolidated review or approval step is not configured as step b in the Hire business process definition. Solution: Edit the Hire BP definition and move the main review/approval step such as Review Employee Hire to be order b. This ensures a seamless flow from initiation to the consolidated review page.
Custom Notification on Subprocess Triggers Incorrectly A notification on Propose Compensation Hire triggers when the parent Hire event is corrected, even if compensation was not changed.	Cause: The system detects a correction on the parent event and triggers notifications on all subprocesses. It cannot determine if a change was made specifically within that subprocess. Solution: This is working as designed. Be aware of this behavior. If this is problematic, consider moving the notification to the parent Hire process and triggering it based on a condition related to the subprocess data.
Cannot Add Validation to Hire Initiation Step An error message is needed if a required field like National ID is not entered on the initial Hire screen.	Cause: The initiation step might be creating a new pre-hire record, so the fields to be validated do not exist in the system until after the step is submitted. Solution: Don't attempt to put validation on the initiation step. Instead, add an Action step immediately after initiation assigned back to the initiator. Example: Change Personal Information or a Review step. Apply the validation rules to this second step.
Duplicate Employee Records	Cause: A new employee record is created for a person who already exists in the system as a pre-hire, former worker, or contingent worker.

Issue	Cause and Solution
	Solution: Use the versions of the Hire Employee task that include an enhanced search for existing persons. Train users to always search for an individual before creating a new pre-hire record. Regularly run audits to identify and merge duplicate records.
Incorrect Data Entered	Cause: Users enter incorrect information during the hire process, such as a wrong start date or an incorrect spelling of the name. Solution: Use data validation rules where possible to catch errors. For critical errors, you might need to use the Correct action on the completed Hire event to fix the data. Provide clear instructions and training to users on how to enter data correctly.
Process Stalled	Cause: The business process is stuck on a step because the assigned user is out of office or is not taking action. Solution: Configure delegation for key roles so that tasks can be automatically rerouted when a user is unavailable. Use the Business Process Status report to monitor the progress of hire events and identify any bottlenecks. You can reassign tasks to another user if necessary.
Incorrect Approvals	Cause: The business process is routing for approval to the wrong person or is not requiring approval when it should. Solution: Review the business process definition and the condition rules on the approval steps. Ensure that the security groups assigned to the approval steps are correctly configured and that the condition rules are accurately evaluating the data.
Error: This business process could not be completed because the proposed organization, position, headcount restriction, or job requisition selected is no longer available to be filled	Cause: The position associated with the Hire event has label "Available for Hire" marked as No. Solution: The position must meet all these conditions to be available: • Create Position business process is complete • Availability Date is on or before the current date • Earliest Hire Date is on or before the effective date of the Hire business process • Position restriction isn't filled and doesn't have an in-progress or completed Freeze Position business process • Supervisory organization isn't frozen • Position restriction doesn't have an in-progress merit promotion

Issue	Cause and Solution
	• Position restriction isn't proposed in an in-progress staffing event • Position restriction doesn't have a future-dated Move Worker (By Organization) or Move Worker (Supervisory) business process • Position restriction doesn't have any in-progress or completed Close Position business processes • Position restriction doesn't have an in-progress Job Requisition business process
Steps in a business process are not being entered during the event	Cause: The business process is enabled for autocomplete. Example: Edit Additional Data steps that are part of the Hire BP do not show in the Hire event process record because the Hire bp is enabled for autocomplete. When a business process is configured for autocomplete, Workday skips some parts of the parent event.

Related Information

Reference

FAQ: Business Processes on page 1201

Concept: Integration Business Process Guidelines

Overview

An Integration Business Process is a configurable workflow that orchestrates the tasks associated with running an integration for exchanging data between Workday and external endpoints. It uses the Integration Process Event business process type, which allows for more complex processing than a simple integration launch. See ../../../integrations/integration-business-processes/dan1370796546938.dita.

These are the sections in this topic:

- Subprocesses
- Prerequisites
- Process Initiators
- Limitations
- Common Business Process Workflows and Guidelines
- Workflow Steps
- Integration
- Notifications
- Issues and Solutions

Subprocesses

You can embed an integration within another business process by adding an Integration step to that business process's definition. When the parent business process reaches that step, it launches the specified Integration Process Event as a sub business process.

Prerequisites

See ../../../integrations/integration-business-processes/dan1370796546538.dita.

Process Initiators

An Integration Business Process can be initiated in several ways:

- Manually

  A user with appropriate permissions can launch the integration directly from the View Integration System report or by using the Launch/Schedule Integration task.
- Scheduled

  You can schedule the integration to run at a specific time or on a recurring basis from the Launch/Schedule Integration task.
- As a sub business process

  The Integration Business Process can be initiated from a step within another Workday business process (Example: running an E-Verify integration after the Complete Form I-9 business process).

Limitations

While the Integration Business Process framework is flexible, the underlying integration technology has specific limitations.

- Organization for an integration system from a web service launch

  When launching an integration via the `Launch_Integration` or `Launch_EIB` web service operations, you can't specify a particular organization-specific version of the business process. The top-level (default) definition for that integration system will be used. See *Organizations and Integration Business Processes* in ../../../integrations/integration-business-processes/dan1370796546938.dita.
- File size limit for document retrieval

  Inbound files have a limit of 1 GB for XML and 300MB for XLSX. See Reference: Integrations and Web Service Limits on page 722.

Common Business Process Workflows and Guidelines

Path 1: Default Integration Workflow	By default, the Integration Process Event consists of two fundamental steps: A: Initiation > B: Service (Fire Integration) The Service (Fire Integration) step executes the integration system itself. For an outbound integration, it generates the output file. For an inbound integration, it loads data into Workday.
Path 2: Outbound Integration with Approval	This workflow is common when you need a user to review data before it's sent out of Workday. A: Initiation > B: Approval > C: Service (Fire Integration) > D: Service: Document Delivery Once approved, the Service (Fire Integration) step runs and extracts the data from Workday, generating the output file. The Service: Document Delivery step delivers the generated file to the external endpoint, such as an SFTP server.

Path 3: Inbound Integration Workflow	This workflow is a standard workflow for bringing data into Workday from an external source. A: Initiation > B: Service: Document Retrieval > C: Service (Fire Integration) The Service: Document Retrieval step retrieves a file from an external source (like an FTP server) or routes a task to a user to manually upload a file. The Service: Fire Integration step executes the integration, taking the retrieved file and loading the data into Workday.
Path 4: Chained Integration Workflow	This pattern is useful when one integration's output is the input for another. A: Initiation > B: Integration > C: Integration The first Integration step triggers the first integration system (Example: an EIB or a Studio integration) to run and produce an output file. The second Integration step triggers a second integration system, which consumes the output file from the first integration.

Workflow Steps

Initiation	Order	A (First Step)
	Performed by	The user or system that launches the integration. This can be an Integration System User (ISU) for scheduled or system-triggered events, or an interactive user for manual launches.
	Security Domain by role	ISU or Integration administrator who launches the integration: *Modify / Put* access to *Integration Build*, *Integration Configure*, *Integration Debug*, *Integration Event*.
	Best Practice	The Initiation step is a mandatory first step for all business processes. It cannot be removed. It serves as the entry point and audit record for the process starting.
	Example	An HR Administrator navigates to the Launch/

		Schedule Integration task and clicks "OK" to run a new hire export to an external benefits vendor. This action completes the Initiation step and begins the business process workflow.

Step Types

Here are the common step types you can add to an Integration Business Process.

Approval	Order	Can be placed anywhere after the Initiation step. For example, you could place it after a Fire Integration step but before a Document Delivery step.
	Performed by	A specified security group (e.g., HR Partner, Compensation Administrator, Manager).
	Security Domains	ISU, Integration administrator, or Business Process administrator: *Modify / Put* access to *Integration Event*.
	Specify	You must specify the security group(s) responsible for the approval.
	Condition Rule	• Use Case: Require a manager to review and approve a file containing employee bonus data before it is delivered to the payroll vendor. • Best Practice: Use condition rules to trigger approvals only when necessary. For example, you could create a

	rule that skips the approval step if the total bonus amount is below a certain threshold. • Example: A condition rule is configured on the approval step to check if the "Total Bonus Amount" field in the integration output is greater than $50,000. If it is, the step is routed to the *Compensation Administrator* security group for approval. Otherwise, the step is skipped.
Step Type Use Cases, Best Practices, and Example:	• Use Case: Ensure data accuracy for sensitive outbound integrations like payroll or stock grants. • Best Practice: Assign approvals to a role-based security group rather than a specific named user to avoid process delays due to employee absence. • Example: Before delivering a file of executive compensation changes to an external system, an Approval step is routed to the *Executive Compensation Admin* security group to validate the data.

Service	Order	Can be placed anywhere after Initiation. The order is critical. For an inbound integration, Document Retrieval must come before Fire Integration. For an outbound, Fire Integration must come before Document Delivery.
	Performed by	Integration System User (ISU).
	Security Domains by role	ISU: *Modify / Put* access to *Integration Build*, *Integration Configure*.
	Specify	You must specify the service to be executed: Document Retrieval, Document Delivery, or Fire Integration.
	Condition Rule	• Use Case: For an integration that runs daily, you might only need to retrieve a file on the first day of the week. • Best Practice: Use condition rules on Document Delivery steps to prevent sending empty files. You can create a rule that checks if the integration event's record count is greater than zero. • Example: A condition rule on a Document Delivery step checks a calculated field that counts the number of records processed by the Fire Integration step. The delivery step only runs

		if the count is greater than 0, preventing the system from sending a blank file to the vendor.
	Step Type Considerations	• Document Retrieval: Used in inbound integrations to pull a file from an external source (like an SFTP server). • Fire Integration: This is the core step that executes the main integration system, either generating an output file (outbound) or loading data into Workday (inbound). • Document Delivery: Used in outbound integrations to send a generated file to an external destination (like an SFTP server or web service endpoint).
Action: To Do	Order	Can be placed anywhere in the process where a manual action or instruction is needed.
	Performed By	A specified security group or user.
	Security Domains	ISU, Integration administrator, or Business Process administrator: *Modify / Put* access to *Integration Event*.
	Condition Rule	Useful for triggering manual intervention only when needed.

		For example, a rule could check if the integration event status is "Completed with Warnings," triggering a To Do for an administrator to review the warnings.
	Step Type Use Cases, Best Practices, and Examples	• Use Case: Notifying an administrator to perform a manual task outside of Workday or to verify data within Workday after a process step. • Best Practice: Make the instructions in the To Do step clear and actionable. Include links to relevant reports or tasks if possible. • Example: An inbound EIB loads new contingent workers. A To Do step is configured to trigger after the Service - Fire Integration step. It is assigned to the *HRIS Analyst* group with the instruction: "Contingent workers have been loaded. Please run the 'Audit New Hires' report to verify their data and complete any missing localizations."

Integration

This step type allows you to launch another, separate integration system from within the current business process. This is how you chain integrations together.

Order	Can be placed anywhere after the Initiation step.
Performed by	Integration System User (ISU).
Specify	You must select the Integration System to be launched as a sub process.
Condition Rules with Use Cases, Best Practices, and Example	Use Case: After a main outbound integration runs, you want to run a second integration to archive the generated file to a long-term storage location, but only if the first integration was successful. Note: Use a condition rule to check the status of a previous step (Fire Integration) to ensure it completed successfully before launching a subsequent integration that depends on its output. Example: An Integration step is configured to launch an "Archive Integration". A condition rule on this step checks the status of the preceding Fire Integration step. The archive integration only runs if the status of the preceding step is "Completed". Use Case: You want to retrieve a file without launching an integration, or launch an integration without delivering a file. Note: Use a condition rule that always evaluates to false. Example: “1=2” on the step that should be skipped.
Step Type Use Cases	• Use Case (Data enrichment): An initial integration extracts basic employee data. A second Integration step calls a different integration that takes the initial output, adds data from another source (like a custom report), and produces a final, enriched file. • Use Case (Process orchestration): After an inbound EIB loads new hires, an Integration step could trigger an outbound integration to provision accounts for those new hires in an external IT system. • Use Case (Redirecting failures): When an integration step fails, route the failed integration to specific users instead of automatically terminating the business process. 1. Configure security groups to have Redirect permissions on the business process security policy. 2. Use the Maintain Redirect related action on the Integration step of the business process definition. 3. Select 1 or more redirect actions, and select 1 or more security groups to receive the redirected step.

Step Type Example	The business process starts and the first step, Service (Fire Integration), runs the PayData Extract integration, which generates a raw payroll data file. The next step, Integration, is configured to launch the PayData Transformation integration. This second integration is designed to pick up the file from the first, reformat it into the vendor's required XML layout, and place the new file in the outbound holding area. The final step, Service (Document Delivery), delivers the transformed XML file to the payroll vendor.

Notifications

Custom notifications are triggered by the final status of the overall integration process event. You can configure notifications on the business process definition itself (Example: on step completion or error).

Use Cases with Best Practice and Example:

- Use Case (Success): Send an email to the Payroll team confirming that the weekly payroll interface file was successfully generated and delivered to the vendor.
- Use Case (Error): If an integration fails, send a high-priority notification to the Integration Administration team with the event details and error messages so they can investigate immediately.
- Best Practice: Use specific, role-based security groups (e.g., *Integration Administrators*) as recipients rather than individual users. Create clear and actionable notification messages that include key information, such as the name of the integration, the time it ran, and a link to the process monitor for details.
- Example: An integration notification is configured to trigger when the business process status is "Failed". It sends an email to the *Integration Support* security group. The email body is customized to say: "The integration CCB - Outbound Demographics has failed. Please review the Process Monitor for details. Event ID: [Event ID]".

Issues and Solutions

This section lists common issues along with their corresponding causes and solutions. For issues not listed here, we recommend searching for knowledge articles in Community. For best results:

1. Search for the exact name of the process using double quotes. Example: "Integration Business Process".
2. Refine the initial results by selecting these search filters:
    - Content Group: Articles
    - Content Type: Knowledge Article
3. Use the Sort by filter to view the results by Relevance or Newest.

Issue	Cause and Solution
External endpoint doesn't receive an expected integration file.	Use the Process Monitor and Full Process Record reports to determine what didn’t work as expected. See *Troubleshooting Integration Process Events* in ../../../integrations/integration-business-processes/dan1370796546938.dita.
Outbound file was not delivered to the external endpoint.	Cause: The business process may have failed before the Document Delivery step, or the delivery step itself failed. Solution: To view the status and error messages related to the failure:

Issue	Cause and Solution
	1. From the Process Monitor report on the Integration process type, find your integration request. 2. On the View Background Process page, click the Parent Event, which is the integration process event. 3. On the View Event page, the Subsequent Processes table displays the integration events for the Integration and the Deliver Document steps. 4. Review the status and error messages for both to pinpoint the failure. 5. Verify the endpoint credentials and address in the delivery configuration.
Inbound integration did not load any data.	Cause: The Document Retrieval step may have failed to find the file, the file could be empty, or the Fire Integration step failed during the data load. Solution: Verify that the file exists at the specified external location and that the file name matches the configuration. Check the Integration Events report. To view the process error messages related to file parsing or data validation, select the Created from Trigger column for the integration event.
An approval step was incorrectly routed or skipped.	Cause: The condition rule on the approval step may be configured incorrectly, or the members of the specified security group may be incorrect. Solution: Use the View Business Process Definition report to review the step's condition rule logic. Use the View Security Group report to verify the membership of the assigned approver group.
Integration fails with a security error.	Cause: The Integration System User (ISU) associated with the integration is missing permissions for a required security domain. Solution: Review the error message in the Integration Events details to identify the protected data or action. Access the Domain Security Policies for Functional Area report to find the relevant domain and add it to the security groups assigned to the ISU.
All integrations fail to launch with the error: "There is no Default Definition for the 'Integration Process Event' Business Process Type..."	Cause: The default business process definition for Integration Process Event has been inactivated, deleted, or edited incorrectly and saved with errors. All integrations rely on this definition as a base. Solution: 1. Run the report Business Process types with Default Definitions in Use.

Issue	Cause and Solution
	2. Filter for the Integration Process Event type to find the definition. 3. Review the definition and ensure it is active and contains, at a minimum, an Initiation step and a Service (Fire Integration) step. Correct any errors and save.
Integration Business Process notifications are configured but are not being delivered via email.	Cause: The tenant-level notification routing rules are not set up to send integration-related notifications via email. Solution: 1. Access the Tenant Setup - Notifications task. 2. In the Notification Sub-Type settings for System, find the Integrations row. 3. Set the Notification Routing Rule to Email / Immediately or another appropriate email-enabled rule.
A chained integration (launched from an Integration step) fails, causing the entire parent business process to terminate.	Cause: This is the designed and expected behavior in Workday. The failure of any step in a business process, including an Integration step, will halt the process by default to prevent further errors. Solution: This is not an error to be "fixed" but a behavior to be managed. 1. Ensure the child integration has robust error handling and its own specific notifications. 2. Review the parent process to see if the child integration is truly critical. If not, it may need to be decoupled and run as a separate, scheduled process rather than being chained.
A Studio integration step with errors is not redirected, even if it's configured with Maintain Redirect.	Cause: Currently the Maintain Redirect feature only works on Studio integrations that complete with a status of "Failed". If a Studio integration completes with a status of "Completed with Errors" then this will not be considered a failure by the Maintain Redirect functionality. Solution: This is not an error to be "fixed" but a behavior to be managed. Ensure the integration has robust error handling and its own specific notifications. See Configure Redirect on Business Process Steps on page 1001.

Concept: Offer Business Process Guidelines

Overview

The *Offer* business process is a configurable workflow used to manage all stages of extending an employment offer to a candidate. See Setup Considerations: Offers.

These are the sections in this topic:

Subprocesses

The *Offer* business process can also initiate other sub-business processes. See Setup Considerations: Offers

Prerequisites

To use the *Offer* business process effectively, you must first configure:

- Security:
    - To view a list of all relevant security domains, access the Domain Security Policies for Functional Area report and select the Recruiting and Pre-Hire Process functional areas.
    - To view the security domains for a specific securable item, access the View Security for Securable Item report.
- Business Process Definition:
    - Edit the *Offer* business process definition to include the required steps for your organization.
    - Add the *Offer* business process as a possible next step on one or more stages of the *Job Application* business process.
- Compensation:
    - Set up compensation components, such as one-time payment plans or stock plans, that you include in offers.
- (Optional) Document Generation:
    - If you plan to generate offer letters from Workday, create document templates using Workday Docs for BPs or the Create Document task.

Process Initiators

The *Offer* Business Process is initiated when:

- A user with the appropriate security permissions moves a candidate to the *Offer* stage within the *Job Application* business process.
- You configure the *Job Application* business process to automatically initiate the *Offer* step when a candidate is moved into a designated stage.

Limitations

The *Offer* business process has several functional and process-related limitations to consider:

- It is not a standalone process and must be used as a sub-process within the *Job Application* business process in Workday Recruiting.

- The feature to automatically initiate an offer only works if the compensation consists solely of salary or hourly plans. It does not support offers that also include allowances, bonuses, commissions, or stock.
- When using workbooks to consolidate multiple offer tasks, you:
  - Are limited to a maximum of 200 offers per workbook.
  - Can't consolidate delegated tasks.
- When an approver uses the Send Back function on an *Approval* step and includes a comment, the comment doesn't display to the user who receives the sent-back task.
- After a candidate has moved past the *Offer* stage to the *Employment Agreement* stage (if the customer uses both *Offer* and *Employment Agreement* together), you can't:
  - Revert to the *Offer* stage.
  - Use the renegotiate function for the offer.

Common Business Process Workflows and Guidelines

These are common workflow configuration paths for the *Offer* business process, with the steps listed in their typical order.

Path 1: Standard Offer

A: Initiation > B: Action (as a sub-process of Job Application) by Recruiter or Hiring Manager > C: Action (Propose Compensation Offer) by Hiring Manager > D: Approval by Hiring Manager's Manager > E: Generate Document by System (automated) > F: Review Document by Recruiter > G: Completion (Make Offer Decision) by Recruiter

Path 2: Offer with Multi-Level Approval Chain

This path is common in larger organizations or for senior roles that require multiple sign-offs.

A: Initiation > B: Action by Recruiter > C: Action (Propose Compensation Offer) by Hiring Manager > D: Approval by Executive or Senior Leader > E: Generate Document by System (automated) > F: Completion (Make Offer Decision) by Recruiter

Path 3: Offer with Consolidated Compensation & Electronic Signature

This workflow streamlines the process by grouping compensation tasks and integrating electronic signatures. See Set Up Adobe Sign and Set Up DocuSign.

A: Initiation > B: Action by Recruiter > C: Action (Consolidated Compensation) by Hiring Manager / Compensation Partner > D: Approval by Executive or Senior Leader > E: Review Document (Send for e-signature) by System / Candidate > F: Completion (Make Offer Decision) by Recruiter (can be automated upon candidate acceptance)

Path 4: Offer with Conditional & Rule-Based Routing

This advanced path uses condition rules to create dynamic workflows that adapt based on the specifics of the offer.

A: Initiation > B: Action by Recruiter > C: Action (Propose Compensation Offer) by Hiring Manager > D: Approval (with Condition Rule) dynamically routed based on rule. Example: Compensation Executive > E: Generate Document (with Condition Rule) by System (selects template based on rule) > F: Review Document by Recruiter > G: Completion (Make Offer Decision) by Recruiter

Workflow Steps

These are the common step types used to build the *Offer* business process workflow:

Initiation	• Step Order: (a) Always use as the first step. • Group: Performed by a Recruiter or HR Administrator.

- Security Domain:
    - Recruiter: Modify access to these domains: *Candidate Data: Offer Details*, *Candidate Data: Offer Initiation*, *Candidate Data: Offer Initiation Business Title*, *Candidate Data: Offer Initiation Weekly Hours*, *Candidate Data: One-Time Payment Offer*, *Candidate Data: Stock Grant Offer*, *Candidate Data: Attachments*, and *Manage: Candidates*.
    - HR Administrator: Modify access to these domains: *Candidate Data: Offer Details*, *Candidate Data: Offer Initiation*, *Candidate Data: Offer Initiation Business Title*, *Candidate Data: Offer Initiation Weekly Hours*, *Candidate Data: One-Time Payment Offer*, *Candidate Data: Stock Grant Offer*, *Candidate Data: Attachments*, and *Manage: Candidates*.
- Specify: Not applicable. This step launches the process.
- Step Type Guidelines:
    - Best Practices:
        - Assign the *Initiation* step to a specific security group like Primary Recruiter instead of Initiator to avoid misrouting tasks to internal candidates.
        - Configure the offer to initiate automatically for simple compensation packages to increase efficiency.
        - Consolidate related compensation tasks (like proposing compensation, one-time payments, and stock grants) into a single user interface for a more streamlined user experience.
    - Use Cases: The primary use case of the initiation step is to gather and submit the core details of a job offer.
    - Example: Your company hires a large number of seasonal workers who are only paid an hourly wage. To streamline the process, you configure the *Job Application* business process so that when a recruiter moves a candidate to the Offer stage, the offer is automatically initiated.
- Condition Rule Guidelines:
    - Best Practice: To improve efficiency for offers that include multiple types of

compensation, such as base salary, a one-time sign-on bonus, and a stock grant, use the *Configure Consolidated Template* option for the *Offer* business process. This option combines the *Propose Compensation*, *Request One-Time Payment* and *Request Stock Grant* steps into a single, consolidated task for the initiator.

- Use Case: A recruiter needs to create a formal employment offer for the selected candidate for a software engineer position. This involves entering the proposed salary, start date, and any other initial compensation details.
- Example: The Recruiter moves a candidate into the *Offer* stage in the recruiting pipeline. This action automatically triggers the *Offer* business process. The Recruiter receives a task in their Workday inbox titled *Propose Compensation for [Candidate Name]*. In this task, they enter the proposed salary, bonus amount, and stock grant details on a single page because you enabled task consolidation.

Action

- Step Order: (b) Typically used for initiation steps, including the first step in the process, or to launch sub-processes that require data entry.
- Group: Performed by a Recruiter, Hiring Manager, or Compensation Partner.
- Security Domain:
    - Recruiter: Modify access to these domains: *Candidate Data: Offer Details*, *Candidate Data: Offer Initiation*, *Candidate Data: Offer Initiation Business Title*, *Candidate Data: Offer Initiation Weekly Hours*, *Candidate Data: One-Time Payment Offer*, *Candidate Data: Stock Grant Offer*, *Candidate Data: Attachments*, and *Manage: Candidates*.
    - Hiring Manager: View access to *Candidate Data: One-Time Payment Offer*, *Candidate Data: Stock Grant Offer*, and *Candidate Data: Attachments* domains.
    - Compensation Partner: View and often Modify access to *Candidate Data: One-Time Payment Offer* and *Candidate Data: Stock Grant Offer* domains.

- Specify: To configure an *Action* step, you must specify the related business process it initiates. You can also configure routing modifiers to direct the task to alternate security groups if the primary security group is unassigned.
- Step Type Guidelines:
    - Best Practice: Consolidate related sub-processes, such as *Salary*, *Bonus*, and *Stock*, into a single, consolidated *Action* step to improve the user experience by presenting all compensation-related tasks in one place.
    - Use Cases: The primary use is to initiate a sub-process that requires its own set of fields and potential approvals, such as proposing compensation, requesting a one-time payment, or initiating a background check.
    - Example: The first step of the *Offer* business process is an Action step labeled *Propose Offer Details*. This step initiates the *Propose Compensation Offer / Employment Agreement* sub-process, which enables the Hiring Manager to enter all relevant salary and allowance information.
- Condition Rule Guidelines:
    - Best Practice: Use condition rules to avoid unnecessary steps for certain populations to ensure that users only see relevant tasks.
    - Use Cases: Condition rules on an *Action* step can determine if the step should run at all. Example: Use a rule to initiate a *Request Stock Grant Action* step only if the candidate's job profile is eligible for equity.
    - Example: An *Action* step to *Initiate Background Check* is configured with the rule: (Job Profile is not Contingent Worker). The step only triggers for employee hires, skipping the background check process for temporary workers.

Approval

- Step Order: Follows an *Initiation* or *Action* step where a decision needs to be reviewed and approved.
- Group: Performed by a Hiring Manager's Manager, HR Partner, Compensation Executive, or Department Head.

- Security Domain:
    - Hiring Manager's Manager: View access to *Candidate Data: One-Time Payment Offer*, *Candidate Data: Stock Grant Offer*, and *Candidate Data: Attachments* domains.
    - HR Partner: View and often Modify access to *Candidate Data: Offer Details*, *Candidate Data: Offer Initiation*, *Candidate Data: Offer Initiation Business Title*, *Candidate Data: Offer Initiation Weekly Hours*, *Candidate Data: One-Time Payment Offer*, *Candidate Data: Stock Grant Offer*, *Candidate Data: Attachments*, and *Manage: Candidates* domains.
    - Compensation Executive: View access to *Candidate Data: One-Time Payment Offer* and *Candidate Data: Stock Grant Offer* domains.
    - Department Head: View access to *Candidate Data: One-Time Payment Offer*, *Candidate Data: Stock Grant Offer*, and *Candidate Data: Attachments* domains.
- Specify: You can specify the security group responsible for the approval. You can also define due dates to remind approvers and configure redirects to send the task to another user after a certain period of inactivity.
- Step Type Guidelines:
    - Best Practice: Limit the number of individual *Approval* steps. For sequential approvals, use an *Approval Chain* step to simplify the business process definition.
    - Use Cases: To secure formal sign-off on the terms of the offer, such as the compensation package, start date, or job title, before it is extended to the candidate.
    - Example: After the Hiring Manager submits the proposed compensation, an *Approval* step is routed to the HR Partner to validate that the offer aligns with internal policies and pay equity standards.
- Condition Rule Guidelines:
    - Best Practice: Apply condition rules to *Approval* steps to enforce financial controls and signing authority policies

without creating entirely separate business process definitions.
- Use Cases: To create dynamic approval routing. A common use case is to require a higher level of approval for offers that exceed certain thresholds.
- Example: An *Approval* step for the Finance Executive has a condition rule: (Proposed Base Salary + Proposed Bonus > $200,000 USD). This step will only be inserted into the workflow if the total compensation exceeds the specified threshold, ensuring proper oversight for high-cost offers.

Generate Document

- Step Order: Typically occurs after all approvals have been received but before the offer is sent to the candidate.
- Group: Performed by a Recruiter or HR Administrator. This step can also be configured to be a system action, especially in higher volume use cases.
- Security Domain:
  - Recruiter: Modify access to these domains: *Candidate Data: Offer Details*, *Candidate Data: Offer Initiation*, *Candidate Data: Offer Initiation Business Title*, *Candidate Data: Offer Initiation Weekly Hours*, *Candidate Data: One-Time Payment Offer*, *Candidate Data: Stock Grant Offer*, *Candidate Data: Attachments*, and *Manage: Candidates*.
  - HR Administrator: Modify access to these domains: *Candidate Data: Offer Details*, *Candidate Data: Offer Initiation*, *Candidate Data: Offer Initiation Business Title*, *Candidate Data: Offer Initiation Weekly Hours*, *Candidate Data: One-Time Payment Offer*, *Candidate Data: Stock Grant Offer*, *Candidate Data: Attachments*, and *Manage: Candidates*.
- Specify: You must select the document category, such as *Offer*, and the specific document template to be used.
- Step Type Guidelines:
  - Best Practice: Ensure all data fields used as placeholders in your document template are available in the business process. Use the Available Rules &

- Fields tab on the business process definition to verify the fields.
- Use Cases: To automatically create a personalized offer letter by merging data from the business process into a standardized Microsoft Word or PDF template.
- Example: After the final approval, the *Generate Document* step runs automatically. It takes the *Standard Professional Offer Letter* template and populates it with the candidate's name, job title, manager, location, and the approved compensation details, creating a complete PDF ready for review.

- Condition Rule Guidelines:
  - Best Practice: Create a separate *Generate Document* step for each unique offer letter template and use condition rules to determine which one to execute. This approach is more transparent than embedding complex logic within a single document template.
  - Use Cases: To select the correct offer letter template based on specific attributes of the job or candidate, such as location, worker type, or union status.
  - Example: The business process has two *Generate Document* steps.

    Step 1 Rule: (Country = USA). Uses the *US Offer Letter* template.

    Step 2 Rule: (Country = Germany). Uses the *German Offer Letter* template.

    Based on the candidate's location, the system will run the correct step and generate the appropriate, legally compliant document.

Review Document

- Step Order: Immediately follows a *Generate Document* step.
- Group: Performed by a Candidate as Self, Hiring Manager, or HR Partner.
- Security Domain:
  - Candidate as Self: View access to the *Candidate Data: Offer Details* domain.
  - Hiring Manager: View access to *Candidate Data: One-Time Payment Offer*,

Candidate Data: Stock Grant Offer, and *Candidate Data: Attachments* domains.
- HR Partner: View and often Modify access to *Candidate Data: Offer Details*, *Candidate Data: Offer Initiation*, *Candidate Data: Offer Initiation Business Title*, *Candidate Data: Offer Initiation Weekly Hours*, *Candidate Data: One-Time Payment Offer*, *Candidate Data: Stock Grant Offer*, *Candidate Data: Attachments*, and *Manage: Candidates* domains.

- Specify: You must specify which document should be reviewed from the list of documents generated in the business process.
- Step Type Guidelines:
  - Best Practice: Assign this step to the Candidate as Self through their Candidate Home so they can review and sign the offer letter.
  - Use Cases: To provide a candidate with a final opportunity to review and sign the generated offer letter. (Optional) Add a *Review Document* step before the *Review Document* step assigned to the Candidate as Self if you require another user, such as a Hiring Manager or HR Partner, to review the offer letter before the candidate.
  - Example: The system generates the offer letter PDF. The process then routes to a Review Document step assigned to the Candidate as Self. The candidate reviews and signs the document and then submits the step, allowing the workflow to proceed.
- Condition Rule Guidelines:
  - Best Practice: Use the *Review Document* step in a condition rule after the *Generate Document* step condition rule, in order to determine which offer letter template to use in the review.
  - Use Cases: Use the *Review Document* step after the *Generate Document* step to send the correct offer letter, based

on specific attributes of the job or candidate, to the candidate for review.

- Example: The business process has two *Generate Document* steps.

  Step 1 Rule: (Country = USA). Uses the *US Offer Letter* template.

  Step 2 Rule: (Country = Germany). Uses the *German Offer Letter* template.

  Based on the candidate's location, the system runs the correct step and generates the appropriate, legally compliant document. The *Review Document* step sends the correct document to the candidate based on the condition rule.

Approval Chain	• Step Order: Used after an *Initiation* step when a management or organizational hierarchy requires multiple, sequential approvals.
	• Group: This step dynamically routes up a defined hierarchy. It is not assigned to a single role but rather to a starting point in a Management Hierarchy or Organizational Hierarchy.
	• Security Domain: Not Applicable.
	• Specify: You must specify the basis for the chain: Management Hierarchy or Organization Hierarchy. You can also define a stopping condition, such as reaching a specific management level or role.
	• Step Type Guidelines:
	  ◦ Best Practice: Clearly define the hierarchy you intend to use (Management vs. Organization) to ensure approvals route as expected. Use the View Diagram feature of the business process to visualize the routing.
	  ◦ Use Cases: To automate a multi-level approval workflow that follows a direct reporting structure without having to define each approver as a separate step.
	  ◦ Example: An offer for a new director requires approval from the hiring manager's entire chain of command up to the Executive Vice President. An *Approval Chain* step is configured to start with the Manager's Manager and continue up the management hierarchy until it reaches the EVP role.

	• Condition Rule Guidelines:
	  • Best Practice: Use an *Approval Chain* step for standard management sign-offs. Example: Manager -> Director -> VP. This configuration is easier to maintain than creating multiple individual *Approval* steps.
	  • Use Cases: A condition rule can determine if the entire approval chain is necessary. Example: An internal hire might not require the same level of management review as an external hire.
	  • Example: A condition rule is placed on the *Approval Chain* step: (Is Internal Candidate? = False). The entire management approval chain is skipped if the candidate is an existing employee moving to a new role.

Completion	This step signifies that the main workflow is finished. Once the completion step is executed, the offer is considered fully approved, and subsequent steps, such as, integrations, archiving, or notifications) can run without holding up the core process. Review the steps and identify which one should represent the final, required action for the offer to be considered approved. This is often the final approval step in the sequence. Locate the row for this step in the grid, and from the related actions menu of that step, select Business Process > Set to Completion. Note: A business process can only have one completion step. If another step is already marked as the completion step, Workday will automatically uncheck it and apply the designation to the step you have just selected.

Integration

An *Integration* step is a type of Action step that you can add to the *Offer* business process definition to launch a pre-configured integration system. This step is most often used to exchange data with a third-party application as part of the offer workflow.

- Step Order: The order of the Integration step is defined by a sequential letter (example: c, d, e) in the business process definition grid. This letter determines when the step will run in relation to other steps. Example: Include an integration to a background check vendor after all internal offer approvals are complete.
- Group: Performed by a Integration System User (ISU). An ISU isn't a person but a special user account configured with the necessary security permissions to run the integration. Specify an ISU in the Run As User field during step configuration.

- Security Domain:
  - ISU: View access to *Job Information*, *Manage: Location, Worker Data: All Positions*, *Worker Data: Public Worker Reports* domains. View and Modify access to the *Candidate Data: Offer Details* and *Propose Compensation* domain.
- Specify: When you add an *Integration* step type to the business process, the main option you must specify is the exact integration system that the step will launch. Select the integration system from a list of all available integration systems configured in your tenant.
- Step Type Guidelines:
  - Best Practices:
    - Security: Always use a dedicated ISU as the Run As User. This ISU should be in a security group that has been granted the minimum required permissions on the necessary domains for the integration to execute successfully.
    - Process Flow: Position the Integration step logically. Example: Only initiate a background check after you secure key approvals and the candidate accepts a verbal offer to avoid unnecessary costs.
    - Self-Contained Logic: If an integration requires complex data mapping, transformations, or needs to be chained with other integrations, build this logic into the integration's own Integration Process Event business process. This configuration keeps the primary Offer business process clean and focused on the core workflow.
  - Use Cases:
    - Automatically sending candidate information to a third-party vendor to initiate a background check or drug screening.
    - Triggering an integration to a relocation services provider for candidates who are eligible for relocation benefits.
    - Sending new hire data to an IT service management tool, such as ServiceNow, to begin the IT provisioning process for laptops and system access.
- Condition Rule Guidelines:
  - Best Practices:
    - Field Availability: When building a condition rule, you can only use fields that are available in the context of the business process at that specific point. Ensure the data you want to evaluate, such as job profile, location, and proposed compensation, is accessible.
    - Thorough Testing: Test your condition rules with multiple scenarios to confirm the integration is triggered, or correctly skipped, as expected. Use a variety of job requisitions, locations, and candidate types in your testing.
    - Clarity and Documentation: Give your condition rules clear, descriptive names so their purpose is immediately understandable to other administrators who may manage the business process in the future.
  - Use Cases:
    - Only running a relocation services integration if the candidate's future work location is in a different state or country from their home address.
    - Triggering a more extensive background check integration, but only for candidates being hired into senior leadership or finance-related roles.
    - Skipping the Integration step entirely for internal candidates who are simply changing roles within the company.
  - Example: You need to run an integration to your relocation vendor. You can create a condition rule to relocate only new hires who are eligible for a relocation package.

Notifications

System Notifications

System notifications are default alerts generated by Workday for business process events. You can view all system notifications on the Notifications tab of the business process. Workday allows you to disable a specific notification, though it's often better to manage notification preferences at the user level or use custom notifications for more targeted alerts. See Configure Business Process System Notifications.

Note: Global notification settings are managed in the Edit Tenant Setup - Notifications task.

Custom Notifications

You can create custom notifications that can initiate on any step of the business process to alert users about events, required actions, or status changes. To create a notification, navigate to the respective step in your business process definition and from the related actions menu of that step, select Business Process > Add Notification. See Create Custom Notifications.

- Guidelines and Best Practices:
    - Use Clear and Concise Language: The subject and body of your notification should be easy to understand. Use dynamic fields (like the candidate's name or job title) to make the notification more personal and informative.
    - Target the Right Audience: Be thoughtful about who receives a notification. Over-notifying users can lead to them ignoring important messages. Use security groups to target roles like Hiring Manager, Primary Recruiter, or HR Partner.
    - Leverage Condition Rules: Use condition rules to control when a notification is sent. This is crucial for sending the right message at the right time and avoiding unnecessary alerts.
    - Consider the Trigger Point: The trigger determines when the notification is sent. Common triggers include:
        - On Entry: Fires when a step begins.
        - On Exit: Fires when a step is completed.
        - On Status: Fires when the overall business process status changes (e.g., Completed, Canceled, Denied).
    - Handle External Candidates Carefully: When sending notifications to external candidates, always select the Do Not Include Notification Details Link checkbox. Since they don't have a Workday account, the link would lead to a login page, causing confusion.
    - Test Thoroughly: Use the Preview option to see a sample of your notification. For more complex scenarios involving condition rules, it's best to test the entire process in a sandbox environment.

- Use Cases with Examples:
  - Scenario 1: Notify Hiring Manager of Offer Acceptance
    - Goal: To immediately inform the Hiring Manager when a candidate accepts their offer.
    - Setup:
      - Trigger: On Exit of the *Make Offer Decision* step.
      - Recipient: Hiring Manager security group.
      - Condition Rule: Create a rule to check if the Offer Status is Accepted. This prevents the notification from firing if the offer is declined or renegotiated.
      - Example Message: Great news! [Candidate's Name] has accepted the offer for the [Job Title] position.
  - Scenario 2: Alert Recruiter to Review Onboarding Documents
    - Goal: After a candidate completes their onboarding questionnaires, notify the recruiter to review the documents.
    - Setup:
      - Trigger: On Exit of the final questionnaire step.
      - Recipient: Primary Recruiter security group.
      - Condition Rule: This can be complex if there are multiple, parallel tasks. A best practice is to use an Alert instead of a custom notification, which you can configure to trigger only when all required onboarding tasks are complete.
      - Example Message: [Candidate's Name] has completed all pre-hire onboarding tasks. Please review the documents in their profile before moving them to Ready for Hire.
  - Scenario 3: Send a Revised Offer Letter Notification
    - Goal: Inform a candidate that a revised offer has been generated due to renegotiation.
    - Setup:
      - Trigger: On Exit of the *Generate Document* step.
      - Recipient: Candidate as Self security group.
      - Condition Rule: Create a rule that checks if the business process is a renegotiation. You can do this by checking if the *Renegotiate* step has been initiated in the process history.
      - Example Message: An updated offer letter is available for your review. Please log in to the candidate portal to view the details.

Issues and Solution

Issues	Solutions
Propose Compensation Offer is not routing correctly.	Cause: This often happens when the routing on the *Propose Compensation Offer* step within the main *Offer* business process is incorrectly configured. For example, it may be routed to the Initiator by default. Solution: To fix this, edit the *Offer* business process definition. On the *Propose Compensation Offer* step, change the routing from Initiator to the specific security group that should approve it, such as Compensation Partner or Primary Recruiter. This ensures the task is routed directly to the correct approver.

Issues	Solutions
Unable to correct a completed offer.	This is working as designed in Workday. Once a candidate's job application has moved to a terminal state like Ready for Hire, the *Offer* business process is considered complete and cannot be corrected directly. To update details from the offer (like the Hire Date), you must first cancel the Hire event. Then, use the Undo Move action to revert the candidate's status from Hire back to a stage where you can re-initiate the offer. After submitting the new offer with the corrected details, you can proceed with the hire process again.
The *Offer* business process is stalling.	Cause: The process has more than 72 consecutive steps that do not require manual user interaction (Examples: steps marked as Not Required or Automatically Skipped). This is a built-in Workday limitation to prevent infinite loops from incorrect configurations. Solution: A business process administrator can use the Manually Process Business Process task to advance the stalled event. For a long-term fix, reconfigure the business process to reduce the number of sequential, non-manual steps. This can be done by splitting the process into multiple, rule-based definitions.
No Deny button during *Offer Approval* step.	Cause: The *Offer Approval* step is configured, but when users view the task there is no Deny button. Solution: Working as designed. The only allowed options for Offer Approvals are: • Approve • Send Back • Save for Later Administrators can verify the Business Process Configuration Options task and select *Offer* for available options for the business process. The recommendation is to utilize the *Send Back* option as an alternative to *Deny*.
Comments added during previous *Offer* steps are not displaying on the *Generate Document* step item in My Tasks.	Cause: When the *Generate Document* step of the *Offer* business process enters the comments are not visible on that step's item in My Tasks that may have been entered by a Recruiter or Manager during a previous step. The comments appear on the candidate's activity feed, but not on the item in My Tasks. Solution: *Generate Document* is a separate business process from *Offer* (even when it's a sub-process of *Offer*). Process comments don't flow from one business process to another. Users entered the comments during the *Offer* process

Issues	Solutions
	so they are for the *Offer* business process only. The *Generate Document* step is part of the *Generate Document* sub-business process of *Offer*, so the *Generate Document* process is a different business process. We expect that comments entered for the *Offer* business process don't display in the process history of the *Generate Document* sub-process and/or on the *Generate Document* item in My Tasks.

Related Information

Tasks

Steps: Set Up Offers

Concept: Onboarding Business Process Guidelines

Overview

The Workday *Onboarding* business process is a configurable framework that enables you to create a personalized journey for new hires, contingent workers, and internal movers, often starting even before their first day (pre-boarding).

These are the sections in this topic:

Subprocesses

You can configure the *Onboarding* business process to include a variety of steps and other business processes to meet your organization's needs. These can be arranged sequentially or in parallel. Common steps:

- Tasks: Is a consolidated step to allow workers to update their own information. This can include *Contact Change*, *Personal Information Change*, *Name Change*, and *Preferred Name Change*.
- To Do: Is a flexible step to assign general tasks and reminders to the worker or other participants in the process.
- Review Documents: Enables you to add documents for review, acknowledgment, or electronic signature.
- Change Benefit Elections: Enables the employee to make their initial benefit selections.
- Complete Form I-9: Manages the U.S. employment eligibility verification process. This is typically preceded by the *Manage Form I-9 Assignment* step.
- Edit Licenses: Enables workers to add or update their professional licenses and certifications.
- Edit IDs: Enables workers to enter government and national ID information.

Prerequisites

You must first set up your environment to complete the Onboarding business process successfully. See the Context section in Steps: Set Up Security for Onboarding and the Prerequisites section in Steps: Set Up Onboarding Business Process.

For tasks initiated within the onboarding process, workers require specific security permissions. Access to complete these tasks is granted through Self-Service roles, such as the *Employee as Self* or *Contingent Worker as Self* security groups. It's crucial to evaluate the security permissions assigned to these Self-Service security groups to ensure they have the appropriate authorization to complete the required tasks.

Process Initiators

You can initiate the *Onboarding* business process for a worker through various actions. See Steps: Set Up Onboarding Business Process.

Limitations

While the *Onboarding* business process is robust, there are some limitations to consider:

- Single Onboarding Process: A worker can only have 1 *active onboarding process* in progress at a time. When a new onboarding event is initiated for a worker who is already in an active process, the new business process event doesn't launch.
- Legal Compliance: Workday provides the tools to assign tasks to pre-hires before their start date but doesn't provide legal advice. Your organization is responsible for ensuring compliance with labor laws regarding compensation for pre-hire activities.
- Form I-9 with International Assignments: The *Complete Form I-9* step isn't initiated when the *Onboarding* process is initiated as part of the *Start International Assignment* business process.

Common Workflows

Path 1: Standard External New Hire Onboarding

This workflow is initiated from the Hire business process and is designed for new, external employees. It is the most comprehensive of the three paths.

```
A: Initiation > B: Tasks by Employee as Self > C: Action by Employee As
 Self > D: Review Documents by Employee as Self > E: Action by Employee as
 Self  > F: To Do by Employee as Self
```

Path 2: Internal Transfer Onboarding (Lite Version)

This lite workflow is initiated from the *Change Job* business process for existing employees. It omits steps that are typically only required for an initial hire.

```
A: Initiation > B: Tasks by Employee as Self > C: Review Documents by
 Employee as Self > D: To Do by Employee as Self
```

Path 3: Contingent Worker (Contractor) Onboarding

This workflow outlines the key steps for onboarding a new contingent worker, from their initial data entry and document review to the internal processes for granting system access and provisioning equipment.

```
A: Initiation > B: Tasks by Contingent Worker as Self > C: Review Documents
 by Contingent Worker as Self > D: To Do by Hiring Manager > E: To Do by IT
 Administrator
```

Workflow Steps

These are the common step types for the *Onboarding* business process workflow:

Initiation

- Step Order: This is always the first step in the business process, designated with the letter a.
- Group: Performed by a system action triggered by the completion of a step in a parent business process (for example, *Hire*). The security of the user initiating the parent process determines who can kick off *Onboarding*. Common roles include:
  - *HR Administrator*
  - *Manager*
  - *Onboarding Specialist*
- Specify: This field is not applicable to the *Initiation* step type.
- Step Type Guidelines:
  - Best Practice: For a seamless new hire experience, the *Onboarding* business process should be configured as a subprocess within the Hire business process. A leading practice is to place the *Onboarding* action step *after* the *Create Workday Account* step in the *Hire* process. This ensures the new hire has system access to complete their onboarding tasks.
  - Use Case: The main use case for the *Initiation* step is to trigger the sequence of events that make up the onboarding journey. This includes generating tasks, sending notifications, and routing documents to the new worker and other relevant roles. It acts as the container for all subsequent steps like *To Do*, *Review Documents*, and other tasks.
  - Example: An *HR Administrator* completes the final step of the *Hire* business process for a new employee. Upon completion, the system automatically initiates the *Onboarding* business process. The new hire then receives a notification to log in to Workday and begin completing their onboarding tasks, such as updating personal information and reviewing company policies..
- Condition Rule Guidelines:
  - Best Practice: Configure rules on the parent business process to trigger specialized *Onboarding* workflows. For example, you might have 1 *Onboarding* process for corporate employees and a separate 1 for manufacturing plant

employees, each with different steps and documents.

- Use Case: While you don't place a condition rule on the *Initiation* step itself (as this would prevent the process from ever starting), you can use rule-based routing on the parent business process (for example, *Hire*) to determine if and which *Onboarding* business process definition to initiate. This allows for different onboarding experiences based on criteria like job profile, location, or worker type.
- Example: A condition rule on the *Hire* business process could check the new hire's country. If the country is the United States, it initiates the *US Onboarding* process which includes *Form I-9* steps. If the country is Canada, it initiates the *Canadian Onboarding* process with country-specific documents and tasks.

Tasks

This is an *Action* step. The specific step type is *Tasks*.

- Step Order: The order is defined within the *Onboarding* business process definition. You can assign a letter or number to sequence the step.
    - Best Practice: To have multiple tasks appear in the worker's Inbox simultaneously, you can configure them as parallel steps by assigning them the same order identifier (for example, making them all step b). However, ensure that the step containing these tasks occurs after the *Create Workday Account* step in the parent business process (for example, *Hire*) to prevent the task from becoming unassigned.
- Group:
    - *Tasks by Employee as Self* is performed by the *Employee as Self* security group.
    - *Tasks by Contingent Worker as Self* is performed by the *Contingent Worker as Self* security group.
    - Best Practice: To allow workers to complete onboarding tasks before their official start date and to prevent tasks from becoming unassigned if a start date is moved, it's best practice to

assign the step to both the pre-hire and active worker security groups:

- For employees: *Employee as Self* and *Pre-Employee as Self*
- For contingent workers: *Contingent Worker as Self* and *Pre-Contingent Worker as Self*

- Security Domains: The security domains that the role-based security group should have access to:
  - *Self-Service: Personal Data*
  - *Self-Service: Person*
  - *Self-Service: Verify National ID*
  - *Self-Service: Home Contact Information*
  - *Self-Service: Work Contact Information*
  - *Self-Service: Emergency Contacts*
  - *Self-Service: Payment Election*
  - *Self-Service: Payroll - USA*
  - *Self-Service: Payroll (My Withholding Elections) - CAN*
  - *Self-Service: Benefits*
  - *Self-Service: Dependents*
- Specify: The configuration for a *Tasks* step doesn't use a *Specify* option field. Instead, you specify the included tasks by selecting them from a list of available self-service business processes. You can choose to group several actions into 1 *Tasks* step or separate them.
- Step Type Guidelines:
  - Best Practices:
    - For a simplified user experience, you can group related items into a single *Tasks* step with a clear label, such as *Complete Your New Hire Paperwork*.
    - If you need to ensure certain tasks are completed before others, you can place them in separate, sequential steps. For example, you could make *Confirm Personal Information* (step b) a prerequisite for *Manage Payment Elections* (step c).
    - For tasks that should only be available on or after the worker's hire date (like benefit elections), use a *Step Delay* on that specific step within the business process configuration. This prevents the

task from appearing in the Inbox prematurely.
- Use Cases: Common tasks bundled within this step include:
    - *Enter Personal Information*
    - *Enter Contact Information*
    - *Edit Government IDs*
    - *Manage Payment Elections (Direct Deposit)*
    - *Complete Federal and State Withholding forms*
    - *Enter Emergency Contacts*
    - *Change Benefit Elections*
- Example: In the *Standard External New Hire Onboarding* workflow, you could configure a *Tasks* step labeled *Initial Onboarding Tasks* assigned to *Pre-Employee as Self* and *Employee as Self*. This single step could include:
    - *Enter Personal Information*
    - *Enter Contact Information*
    - *Enter Emergency Contacts*
- Condition Rule Guidelines: You can apply condition rules to control whether the step initiates or is skipped.
    - Use Case: A condition rule can be configured to automatically skip approval steps for personal and contact information updates if the worker accesses the task but does not make any changes before submitting. This prevents unnecessary routing to approvers.

Action

- Step Order: Can be placed anywhere after the *Initiation* step (step a). You can use letters (b, c, d) to define the sequence. Steps with the same letter run in parallel.
- Group: Who this is performed by is highly flexible. It can be assigned to the *Onboarding Administrator*, *Employee As Self*, *Contingent Worker as Self*, *Manager*, *HR Partner*, *Benefits Partner*, or any other security group with the necessary permissions for the subprocess being initiated.
- Security Domains: The security domains that the role-based security group should have access to:
    - *Onboarding Administrator*: Access to tasks for setting up Onboarding rules and templates. Access to this

domain should be restricted: *Set Up: Onboarding*.
    - *Employee As Self*: Access to the self-service aspect of the Onboarding process, including worklets on the dashboard: *Self-Service: Onboarding*, *Self-Service: Home Contact Information (and subdomains)*, *Self-Service: Work Contact Information (and subdomains)*, *Self-Service: Emergency Contacts*, *Self-Service: Benefits*, *Self-Service: Payroll (My Withholding Elections)*.
    - *Manager*: View or modify access to *Worker Data: Work Contact Information (and subdomains)*.
    - *HR Administrator: Set Up: Onboarding* (Access to tasks for setting up Onboarding rules and templates. Access to this domain should be restricted), *Person Data: Home Contact Information (and subdomains), Worker Data: Work Contact Information (and subdomains), Person Data: Emergency Contacts.*
    - *HR Partner*: View or modify *Person Data: Home Contact Information (and subdomains)*, *Worker Data: Benefits*, *Worker Data: Work Contact Information (and subdomains)*.
    - *Benefits Administrator/Partner*: View or modify *Worker Data: Benefits, Person Data: Emergency Contacts*.
- Specify: Select the specific business process to be launched as a subprocess. Examples for Onboarding:
    - *Change Personal Information*
    - *Change Contact Information*
    - *Change Government IDs*
    - *Change Emergency Contacts*
    - *Change Benefit Elections*
    - *Complete Form I-9*
- Step Type Guidelines:
    - Best Practice: Group similar data collection tasks. For instance, instead of separate steps for Personal, Contact, and Emergency Contact information, you can use the consolidated Tasks step type. However, if you need separate approvals or routing for each, keeping them as distinct Action steps is better.
    - Example: An Action step labeled *Complete Your Profile* could initiate

the *Change Personal Information* subprocess, assigned to the *Employee As Self*.

- Condition Rule Guidelines:
    - Best Practices:
        - Build and test rules one at a time.
        - Use specific fields to make your rules precise.
        - Leverage the Business Process Configuration Options report to see available fields for your rules.
    - Use Cases:
        - Condition rules are essential for creating dynamic and relevant onboarding experiences. You can use them to include or skip steps based on worker data.
        - Skip benefits enrollment for part-time workers who are not benefits-eligible.
        - Include a state-specific policy review document only for workers in a particular state.
        - Trigger a different set of tasks for an internal transfer versus a new hire.
    - Example: To run the *Complete Form I-9* step only for US-based hires, you could create a rule:
        - Rule Type: Entry Condition.
        - Condition: *Country* for the worker's primary position is *United States of America*.

To Do

- Step Order: Can be placed anywhere in the flow. Often used for reminders or tasks that do not have a dedicated business process.
- Group: Performed by any security group. Common assignees are:
    - *Employee as Self*.
    - *Manager*.
    - Departmental coordinators (for example, *IT Support*).
- Specify: You select a pre-configured *To Do* from the list you maintain in the Maintain To Dos task.
- Step Type Guidelines:
    - Best Practice: Use *To Do* steps for non-system tasks or simple reminders. This

keeps the business process clean and avoids creating complex subprocesses for simple actions.
    - Example: A *To Do* assigned to the new hire could be *Watch the CEO's Welcome Video*, with a link to the video in the instructions.
- Condition Rule Guidelines:
    - Best Practices:
        - Keep the text of the *To Do* clear and actionable.
        - Use notifications to remind the assignee if the due date is approaching.
    - Use Cases:
        - Assign a *Request Laptop To Do* to the manager only for salaried employees.
        - Remind a new hire to *Review the Company Holiday Calendar* if their hire date is near a public holiday.
    - Example:
        - A *To Do* step labeled *Manager: Prepare Welcome Packet* can be assigned to the Manager role.

Review Documents	This is an Action step.
	• Order: Is typically placed after initial data collection but before the completion step.
	• Group: Performed by almost always *Employee As Self*.
	• Specify: You can configure which documents to include and if they require an electronic signature. Example: Employee Handbook, Non-Disclosure Agreement.
	• Step Type Guidelines:
	  ◦ Best Practice: For critical compliance documents, make this a required step and use the electronic signature feature for tracking and auditing purposes.
	  ◦ Example: A step labeled *Acknowledge Company Policies* could contain the Code of Conduct, IT Acceptable Use Policy, and the Employee Handbook.
	• Condition Rule Guidelines:
	  ◦ Best Practice: Group documents that have the same audience and signature

requirements into a single step to streamline the user experience.
- Use Cases:
    - Present a different employee handbook based on the worker's country or company.
    - Include a sales commission plan document only for employees in the Sales organization.
- Example: A rule could check the worker's *Job Family*. If the *Job Family* is Sales, the step includes the *Sales Incentive Plan* document for signature.

Service	• Step Order: The order is critical for these steps. For example, *Create Workday Account* must happen before any tasks are routed to the new employee.
	• Group: Performed by a system and does not have a person assigned to it in the traditional sense.
	• Specify: You select the specific system service to be executed. Common services in *Onboarding*:
	  ◦ *Create Workday Account*
	  ◦ *Onboarding Plan Assignment*
	• Step Type Guidelines:
	  ◦ Best Practice: These are background system processes. They are not tasks a user completes but are critical for the workflow's automation.
	  ◦ Example: Placing the *Create Workday Account* service early in the Hire process allows a pre-hire to get their login credentials and start their onboarding tasks in Workday before their first day.
	• Condition Rule Guidelines:
	  ◦ Best Practice: These steps are foundational. Ensure they are placed correctly in the sequence of the parent business process (for example, *Hire*) to enable the *Onboarding* process. The *Create Workday Account* step must come before the *Onboarding* step itself.
	  ◦ Use Case: You might use a condition rule to prevent a Workday account from being created too far in advance of the hire date.
	  ◦ Example: The *Onboarding Plan Assignment* service step is added to the *Hire* business process to automatically

assign the correct onboarding plan to the new hire.

Integration

In Workday, you can launch an integration from any business process that supports the *Integration* step type. This is commonly used during onboarding to send data to third-party systems (like for *Benefits*, *Payroll*, or IT provisioning) or to initiate internal processes such as, *E-Verify for Form I-9*.

- Step Order: Integrations can occur at multiple steps within the workflow. This step usually occurs after all approvals are complete, but before the process completes.
- Group: Performed by the system and requires you to assign a pre-configured Integration System User (ISU) that has the necessary security permissions to run the integration.
- Specify: Select the specific integration system to run. This could be a pre-built Workday connector, like one for a corporate card provider, or a custom-built integration using Workday Studio, Enterprise Interface Builder (EIB), or Core Connectors.
- Step Type Guidelines
    - Best Practices:
        - Build First: Always create and configure the integration system before you try to add and configure the Integration step in the business process.
        - Use an ISU: Aways use an *Integration System User* to run the integration. This enhances security and makes auditing easier.
        - Separate and Deliver: An integration process is often separated into generating a file and delivering it. If an external system does not receive a file, use the *Process Monitor* and *Integration Events* reports to troubleshoot whether the file generation or the delivery step failed.
    - Use Cases:
        - Outbound Integration: The most common use case in *Onboarding* is to trigger an outbound integration to send new hire data to an external system. Examples include sending worker data to Okta or Active Directory for IT account provisioning, transmitting new hire information to a third-party payroll or benefits provider, Submitting employee data to *E-Verify* through the *Complete Form I-9* business process.
        - Inbound Integration: While less common as a direct part of the *Onboarding* business process, an integration could trigger a process that eventually loads data back into Workday (for example, receiving a new hire's permanent ID from a global HR system).
- Condition Rule Guidelines:
    - Best Practices: Test your rules regularly to ensure they are routing as expected, especially after making changes to the business process definition.
        - Avoid overly complex rules that are difficult to maintain. Sometimes creating a separate, rule-based definition of the business process is cleaner than building many complex rules within a single definition.
        - Be cautious with concurrent steps that are also conditional as they can sometimes cause the process to hang. It is often better to place critical integrations in their own sequential step.
    - Use Cases: Skip Unnecessary Steps: Create a rule to skip an approval step if a worker re-submits personal or contact information without making any actual changes.
        - Rule-Based Routing: Define different versions of the *Onboarding* business process based on criteria like *Company*, *Supervisory Organization*, or *Location*. For example, you

    can have a unique onboarding process for workers in Canada versus the United States, which includes different integration steps for country-specific vendors.
    - Individualized Content: Use condition rules to define *Audiences for Onboarding Plans*, allowing you to send targeted content, tasks, and documents to different groups of new hires.
- Example: Skip the *Review Document* step for internal transfers who have already seen the company handbook.
    - Rule Logic: Create a condition rule on the *Review Document* step that evaluates to *false* if the Hire Source for the worker is Internal Transfer. The step will then be skipped for this population but will trigger for all external hires.

Notifications

System Notifications

System notifications are default alerts generated by Workday for business process events. You can view all system notifications on the Notifications tab of the business process. Workday allows you to disable a specific notification, though it's often better to manage notification preferences at the user level or use custom notifications for more targeted alerts. See Configure Business Process System Notifications.

Note: Global notification settings are managed in the Edit Tenant Setup - Notifications task.

Custom Notifications

You can create custom notifications that can initiate on any step of the business process to alert users about events, required actions, or status changes. To create a notification, navigate to the respective step in your business process definition and from the related actions menu of that step, select Business Process > Add Notification. See Create Custom Notifications.

- Guidelines and Best Practices:
    - Consolidate When Possible: Instead of sending a separate notification for every single task a new hire needs to complete, consider consolidating them. For example, you could send a single *Welcome* email that links to the new hire's *Workday Onboarding* dashboard or their *My*

Tasks page, where they can see all their pending items. This helps to avoid overwhelming the new hire with too many emails.

- Use Clear and Action-Oriented Language: The subject and body of your notifications should be clear, concise, and tell the recipient exactly what they need to do. Use dynamic fields to personalize the message with the new hire's name, start date, manager, and so on.
- Leverage Dynamic Content: Use class report fields to pull relevant information into your notifications. This can include details like:
  - Hire Date.
  - Job Title.
  - Manager.
  - Work Location.
  - Links to the Onboarding Dashboard.
- Consider the Audience: Tailor the content and tone of your notifications to the recipient. A notification to a new hire will have a different tone than a notification to an IT team member or a hiring manager.
- Branding: Use the *Maintain Email Templates* and *Notification Designer* tasks to create branded email templates that align with your company's look and feel. You can override the default email template on any custom notification to use a specific branded template.
- Triggering a Welcome Email:
  - To ensure the new hire has access to Workday, this notification should be triggered after the *Create Workday Account* step in the *Hire* business process.
  - You can use a step delay to send this notification a certain number of days after the hire is complete, or you can trigger it immediately upon entry into the *Onboarding* process.
- Notifying Internal Teams:
  - Create custom notifications to alert internal teams like *IT*, *Facilities*, and *Payroll* that a new hire has been processed.
  - These notifications should be triggered at the appropriate point in the process. For example, an IT notification could be triggered upon completion of the *Hire* business process.
  - Include relevant details in the notification, such as the new hire's name, start date, location, and any specific equipment or access requirements.
- Managing Subprocess Notifications:
  - The *Onboarding* process often involves subprocesses (for example, for benefits enrollment, I-9 verification). These subprocesses have their own notification configurations.
  - If you want to suppress notifications from a subprocess to avoid sending too many emails, you can disable the system notifications on the initiation step of that subprocess.
  - Be mindful that a subprocess might be used by other business processes. To avoid unintended consequences, you can add a condition rule to your custom notifications to *initiate only if a standalone business process*.
- Using Condition Rules:
  - Condition rules are powerful tools for controlling when a notification is sent. You can use them to:
    - Send a notification only if certain criteria are met, for example, if the new hire is in a specific location or job profile.
    - Send different notifications to different groups of people based on the data in the business process.
  - Ensure that a notification is only sent after a series of steps have all been completed.
- Handling Optional Steps: Be aware that if you configure a notification on an optional step, the notification will be sent even if the step is skipped. Plan your notification strategy accordingly.

- Examples:
  - Goal: Send an exciting welcome message to a new hire as soon as the *Onboarding* business process is initiated.
  - Setup: Create a custom notification on the Initiation step of the *Onboarding* business process. The recipient is *Employee as Self*, and the notification is routed to their personal email.
  - Goal: Send the new hire key information they need for their first day.
  - Setup: Create a notification triggered by a *To Do* step scheduled for the day before their start date.

Issues and Solutions

Issue	Cause and Solution
Onboarding process does not trigger for new hires after the Hire is complete.	Cause: This can have several causes: 1. Onboarding steps become unassigned if a Workday account has not already been created for a new hire. 2. The *Onboarding* and *Onboarding Setup* steps are not correctly ordered or included in the parent *Hire* business process. Solution: 1. Use the *Create Business Process Definition (Default Definition)* task to create a default definition for the *Onboarding Setup* business process. 2. In the *Hire* BP definition, ensure the *Onboarding Setup* step comes immediately before the *Onboarding* step. Both of these steps must be placed *after* the *Create Workday Account* step.
New hires do not receive the onboarding notification.	Cause: The most common cause is an incorrect routing rule. For pre-hires, the notification must be routed to their personal email address. Solution: Navigate to *Edit Tenant Setup - Notifications*. Under the *HCM* section, ensure that notifications for the *Onboarding Plan Notifications* or the relevant custom notification are configured to route to *External Email* for the intended audience. Also, verify that the pre-hire has a personal email address populated in Workday.
New hires do not receive all their onboarding tasks in their inbox at once.	Cause: The steps in the Onboarding business process definition are configured with different order numbers (for example, c, d, e), causing them to be delivered sequentially as each preceding step is completed. Solution: Review the Onboarding business process definition. If the goal is for all tasks to appear at once, ensure the relevant steps (for example, *To Do*, *Review Documents*, *Change Personal Information*) are configured with the same *Order* letter (for example, c, c, c). This will

Issue	Cause and Solution
	make them parallel steps that appear in the inbox simultaneously.
The *Complete Form I-9* step gets stuck and does not proceed.	Cause: The *Complete Form I-9* step is configured to run concurrently (that is, with the same order number) as other steps in the *Onboarding* business process. The E-Verify integration, which is part of this step, will often not fire until all other parallel steps are completed. Solution: Edit the Onboarding business process definition to place the *Complete Form I-9* step in its own sequential step (with a unique order number). It should not have any other steps running in parallel with it for best results.
Notification is not being triggered when the business process step is completed.	Cause: The notification may not be correctly associated with the business process step, or there might be a condition on the notification that is not being met. Solution: Review the custom notification setup to ensure it is linked to the correct business process and step. Check the *Condition* tab on the notification to see if there are any rules preventing it from triggering. Also, check the *Process Monitor* for the worker to see if the business process is behaving as expected.
Links in the notification (for example, to the *Onboarding Plan*) do not work for the new hire.	Cause: This is often a security issue. The new hire may not have been granted access to their Workday account yet, or the security for the target page is insufficient. Solution: Ensure the *Create Workday Account* step in the *Hire* or *Onboarding* business process runs before notifications with internal links are sent. Verify that the *External Preboarding* setup is configured correctly if you want pre-hires to access content before their start date.
Manager or other participants are not receiving their reminder notifications.	Cause: The recipient may be incorrectly defined, or the user may not have a work email address in Workday. Solution: Check the *Recipient* field on the custom notification to ensure the correct role (for example, *Manager*, *HR Partner*) is selected. Verify in the worker's profile that the intended recipient has a valid work email address.
An approver or other participant (for example, *Manager*) cannot see or take action on an onboarding step.	Cause: This is typically a security issue where the user's security role does not have permission for that specific step in the business process. Solution: Access the *Business Process Security Policy* for the *Onboarding* business process. Find the specific step (for example, *Review Documents*, *To Do*) and ensure the appropriate security group

Issue	Cause and Solution
	(for example, *Manager*, *HR Partner*) is listed with permission to take action on that step.

Related Information

Concepts

../../../human-capital-management/recruiting/Onboarding-Experience/concept--preboarding-and-onboarding.dita

Concept: Business Processes on page 954

Tasks

../../../human-capital-management/staffing/onboarding/onboarding-dashboard/dan1370797174813.dita

../../../human-capital-management/staffing/onboarding/onboarding-dashboard/dan1370797177262.dita

Create Custom Notifications on page 1091

Reference

FAQ: Business Processes on page 1201

Reference: Security Domains for the Expense Report Event Business Process

List of security domains under the Expenses functional area:

Domain	Description
Process: Expense Reports	Grants access to users with company-based or unconstrained roles to manage expense reports and related reporting. For more granular control on expense report actions, you can grant permissions on these various subdomains: • *Process: Expense Report - Attachments*: This subdomain grants access to add attachments after expense reports are approved. • *Process: Expense Report - Cancel*: This subdomain grants access to cancel expense reports. To modify expense reports, you must also grant access to the *Process: Expense Report - Core* subdomain. • *Process: Expense Report - Change:* This subdomain grants access to change expense reports. To modify expense reports, you must also grant access to the *Process: Expense Report - Core* subdomain. • *Process: Expense Report - Core*: This subdomain grants access to create or modify expense reports for workers and non-workers. To create expense reports for workers or non-workers, you must also configure the initiating action in the Expense Report business process. • *Process: Expense Report - Other:* This subdomain grants access to additional tasks not directly related to managing expense reports, such as tasks for travel profile, mileage accumulator, and any available fix tasks for expense report. To

Domain	Description
	perform fix tasks, users must also have modify access to the *Process: Expense Report - Core* subdomain. Travel profile tasks do not require Core. • *Process: Expense Report - Reporting:* This subdomain grants access to report data sources and filters for expense report reporting. • *Process: Expense Report - View*: This subdomain grants access to view expense reports.
Access Expense Item (Segmented)	Controls which users can access which expense items.
Manage: Expense Report for Pre-Hire	Provides access to manage expense reports on behalf of pre-hires and view related reporting
Manage: Payment Election	Provides access to manage payment elections on behalf of others and view related reporting.
Organization: Manage Central Travel Card Transactions	Provides access to manage central travel card transactions for organizations configured on the corporate credit card billing account.
Print: Expense Report	This non-configurable domain derives its security from the View or View/Modify permissions from the *Process: Expense Report - View* domain.
Process: Expense Report Work Area	Provides access to the Expense Report Work Area report, which enables users to take action on expense reports awaiting approval, such as reviewing, sending back, or approving them.
Process: Receivable Repayment	Grants access to users with company-based or unconstrained roles to manage receivable repayments. For more granular control on receivable repayment actions, you can grant permissions on these various subdomains: • *Process: Receivable Repayment - Cancel*: This subdomain grants access to cancel receivable repayments. To modify receivable repayments, you must also grant access to the *Process: Receivable Repayment - Core* subdomain. • *Process: Receivable Repayment - Core*:This subdomain grants access to create or modify receivable repayments. • *Process: Receivable Repayment - Reporting*:This subdomain grants access to report data sources and filters for expense receivable repayment reporting. • *Process: Receivable Repayment - View*:This subdomain grants access to view receivable repayments.

Domain	Description
Process: Spend Authorization	Grants access to users with company-based or unconstrained roles to manage spend authorizations and related reporting. For more granular control on spend authorization actions, you can grant permissions on these various subdomains: • *Process: Spend Authorization - Cancel*: This subdomain grants access to cancel spend authorizations. Users must also have modify access to the *Process: Spend Authorization - Core* subdomain. • *Process: Spend Authorization - Change*: This subdomain grants access to change spend authorizations. Users must also have modify access to the *Process: Spend Authorization - Core* subdomain. • *Process: Spend Authorization - Close*: This subdomain grants access to close spend authorizations. Users must also have modify access to the *Process: Spend Authorization - Core* subdomain. • *Process: Spend Authorization - Core*: This subdomain grants access to create or modify spend authorizations for workers. To create spend authorizations for workers, you must also configure the initiating action in the Spend Authorization business process. • *Process: Spend Authorization - Reporting*: This subdomain grants access to report data sources and filters for spend authorization reporting. • *Process: Spend Authorization - View*: This subdomain grants access to view spend authorizations. • *Process: Spend Control and Analysis (Expenses)*: This domain provides access to view spend analytics and to freeze spend for an organization.
Process: Spend Authorization Mass Close	Grants access to spend authorization mass close documents and view related reporting.
Process: Spend Control and Analysis (Expenses)	Provides access to view spend analytics and to freeze spend for an organization.
Process Travel Booking	Provides access to load travel booking records and view related reporting.
Process Travel Booking Files	Enables users to load and manage travel-related files that originate from external sources. You can add only unrestricted users to this domain.
Reports: Expense Report Payment	Provides access to view a specific expense report payment.

Domain	Description
Reports: Organization Expense Report Reporting	Grants access to users with organization-based roles to view expense reports and related expense report line level reporting. For more granular control on spend expense reporting actions, you can grant permissions on these various subdomains: • *Reports: Organization Expense Report Line Reporting*: This subdomain grants access to users with organization-based roles to report data sources and filters for expense report line level reporting. • *View: Organization Expense Report*: This subdomain grants access to users with organization-based roles to view expense reports applicable to their organizations.
Self-Service: Expense Report	Provides self-service access to process expense reports and view related reporting. This domain also secures the Expenses worklet on the Workday home page. For more granular control on spend expense reports, you can grant permissions on these various subdomains: • *Self-Service: Automated Expenses*: Enables users to access a streamlined expense workflow and user interface that includes automated expense creation when Workday receives credit card transactions or scanned receipts. This workflow also includes automated merging for credit card transactions and receipts that relate to the same expense. • *Self-Service Expense Reports - Attachments*: This domain provides self-service access to add attachments to expense reports after they have been approved. Workday recommends to grant Modify access to this domain carefully, as it allows for the deletion of attachments on approved and paid expense reports. • *Self-Service: Receipt Scanning*: Provides users access to the Receipt Scanning feature.
Set Up: Payment Election	Provides self-service access to process payment elections and view related reporting.
Self-Service: Receivable Repayments	Provides self-service access to their Receivable Repayments.
Self-Service: Travel Booking	Provides self-service access to view and modify travel booking records linked to a worker.
Self-Service: Spend Authorization	Provides self-service access to process spend authorizations and view related reporting.

Domain	Description
Set Up: Expense Item	Provides access to set up expense items and view related reporting.
Set Up: Expense Protect	Grants users with unconstrained roles access to Expense Protect Setup.
Set Up: Expense Processing	Provides access to managing expense Company assignments that differ from payroll Company assignments.
Set Up: Payment Election	Grants access to set up payment election processing details and view related reporting.
View: Expense Item	Provides access to view a specific expense item.
View: Payee Bank Account for Settlement	Controls who can view payee bank account information.
Worker Data: Expense Report	Grants access to view expense reports for a worker.
Worker Data: Payment Elections by Organization	Grants access to set up payment election processing details and view related reporting for selected workers within organizations where you have access via role on the worker's pay group or company. (User-based/non-contextual groups will be able to access all workers.)
Worker Data: Spend Authorization	Provides access to spend authorizations for a worker.
Worker Data: Travel Profile	Provides access to manage a worker's Travel Profile.
Manage: Expense Report	Secures the Find Expense Report report and enables users with access to edit expense reports that have been saved for later.
Manage: Expense Advance Repayment	Provides access to record receipt of expense advance repayment and view related reporting. (Applicable for Cash Advances functionality).
Manage: Unlock Payment Election Access	Enables users to unlock individuals blocked from managing bank details and payment elections due to multiple failed verification attempts.
Process: Expense Report Payment/Settlement	Provides access to perform the settlement function for expense payments and view related reporting.
Process: Expense Report Payment Escheatment	Provides access to perform expense report and credit card expense payments escheatment and view related reporting.

FAQ: Business Processes

FAQ: Business Processes

How do I find business process definitions with critical errors?

How do I find business process definitions with critical errors?	Use the Business Process Exception Audit report to find all *business process definitions* with critical errors. When you run this report you have the option of showing warnings. Warnings might not be a problem, depending on what you want the business process to do, but Workday recognizes the potential for unexpected results and gives you an opportunity to check. The related actions menu in the Business Process column is the same as the related actions menu for a business process's definition. The related actions menu in the A Problem Exists With column is the same as the related actions menu on an individual step on the business process's View Definition page. If a business process is broken, Workday automatically sends a Fix Business Process task to Business Process Administrators and provides a link to correct the business process definition.
How can I remove inactive security groups associated with allowed actions that are no longer available?	When a business process contains actions that are no longer available on the business process security policy and these actions are still associated with inactive security groups, audit reports might flag the business process for you to take action. Example: The Security Exception Audit report. To resolve the issue, consider running the Remove Inactive Security Groups from Unavailable Actions task. This task helps you identify and remove inactive security groups associated with allowed actions that are no longer available. To access the task, you must have permission on these domains: • *Business Process Administration* • *Security Activation* • *Security Configuration* Before you proceed to run the Remove Inactive Security Groups from Unavailable Actions task, determine if you need to remove inactive security

groups in your tenant. You won't be able to undo this process.

Follow the steps below:

1. Access the Activate Pending Security Policy Changes task to confirm and activate existing security changes. Workday strongly recommends that you run this task first.
2. Access the Remove Inactive Security Groups from Unavailable Actions task. Select Confirm and click OK. A background process runs and removes the inactive security groups.
3. Access the Activate Pending Security Policy Changes task again to complete the process of removing inactive security groups. If you don't see the business process type on the Activate Pending Security Policy Changes task, continue to confirm the pending security policy changes.

Once you remove the security group and access the Security Exception Audit report, Workday won't display the security group on the Business Process Security Policy Exceptions tab. The Remove Inactive Security Groups from Unavailable Actions task doesn't address audit items that might display on these Security Exception Audit report tabs:

- Domain Security Policy Exceptions
- Security Group Exceptions

How do I find and fix stalled business processes?

There are several possible reasons why a business process might have stalled and several ways to look for them. Looking at the Business Process Transactions Awaiting Action, Business Process Transactions Awaiting Action for X Days, and Business Process Transactions of Type Awaiting Action reports does not necessarily identify problems, since every step normally waits for a day or more for the responsible person to complete it.

Stalled business processes fall into two main categories, business processes awaiting action and business processes with critical errors.

- Business Processes Awaiting Action
    1. Run the Business Process Transactions Awaiting Action for X Days report, which places the oldest instances at the top.
    2. Use the Full Process Record for the business process transaction to find the steps that are awaiting action and who they are waiting for. Select Business Process > Full Process

Record from the related actions menu of the business process transaction.

    - If the list of processes awaiting action is too long, you can use the Business Process Transactions of Type Awaiting Action report and specify the business process types that you are looking for. For this report you can specify the business process default definition names you are interested in and limit the report output to those.
    - If you find that a step is unassigned, see How do I find and fix unassigned tasks?.

3. Check to see if the worker assignment has an effective date that is in the future. Also check to see if security has changed. It is possible to change the security policy for the business process so that after the task arrives in a worker's My Tasks, their security access permission has changed and they can no longer access the task. In that case, you must reassign it.

- Business Processes with Critical Errors
    - If you attempt to run a business process whose definition has a critical error as of the date the step was entered, Workday uses the default definition instead.

      Example: If the *Propose Compensation* step of the *Hire* business process was entered on January 3rd, and the *Propose Compensation Hire* business process had a critical error at that time, Workday uses the default definition for the business process. However, if the critical error in the business process was fixed on January 4th, no error is evident when you look at the *Hire* event. To determine the business process definition that an event is using, select Business Process > View Definition from the related actions menu of the event. If the event is using the default definition of the business process when it should be using a custom definition, view the business process definition as of the date the step was entered to view the critical

	error in the business process at that time. If the default definition is not configured properly for your organization, it might stall or otherwise not run as you expect. See How do I find business process definitions with critical errors?.
How do I find and fix unassigned tasks?	A task becomes an unassigned task when the specified security group doesn't contain a user, or contains only users with disabled Workday accounts. Example: If a step is secured by the *Employee as Self* security group but the assigned user has a future hire date, the task is unassigned. A task can also be unassigned if the assigned user's Workday Account is disabled, expired, or locked, or if the assigned user has no user ID and password and cannot access Workday to see their notification or complete their assigned step. The Unassigned Tasks report displays steps where this is the problem. Business Process Administrators can reassign unassigned tasks to workers or to Affiliate role holders in the required security group. Workday sends a notification email to members of all security groups with View and Modify permissions to the *Business Process Administration* domain when a task becomes unassigned. This is not the same problem as when users going on vacation need to temporarily reassign their tasks to other users. See Delegate My Tasks on page 1082. Follow the steps below: 1. Access the Unassigned Tasks report. Workday recommends that you filter the list of unassigned tasks by specific business processes, date range, or both. 2. For each unassigned task find the security group listed as having an unassigned user. 3. Look at the related action menu to determine the type of security group. • For a user-based security group, edit the security group membership to assign a worker or Affiliate role holder, and ensure the assigned user has an active Workday user ID and password. • For any other security group type, the group specifies objects other than workers. Make sure that the security group is populated and that the specified object includes a worker or Affiliate role holder. The object could be a role, job profile, job

	category, job family, management level, organization, location, or another security group. 4. Once you have added a user to the security group, confirm the change using the instructions in Unassigned Tasks. This is necessary to restart the business process instance.
Why can't I see business process event step details?	Use the following questions to determine if you have access to a business process event. If the answer to all of these questions is No, then you do not have access to the event. • Are you a member of a security group that can perform the *View All*, *Cancel*, *Correct*, or *Rescind* actions on the event's business process security policy? • Are you a member of a security group that can perform the *View Completed Only* action on the event's business process security policy, and is the event both completed and not future-dated? • Do you have Modify access to the *Business Process Administration* domain? • Do you currently have a related non-To Do item in your My Tasks? If you currently have a related To Do item in your My Tasks, you might have access to the business process event, but not to the Details tab. You can also use the Business Process Policy View Audit report to solve a number of security-related issues. It shows security groups that can perform *Action* steps, make approval decisions, and receive notifications, but do not have *View All* or *View Completed Only* access in the business process security policy. In these cases, you can only view the event when the task is in your My Tasks. Once the task is no longer in your My Tasks, you lose access to the event. As a result, you might receive an email notification containing a link to the event that returns an error when you click the link. This error occurs because you do not belong to a security group with *View All* or *View Completed Only* access to the event. Running the Business Process Policy View Audit report can help you clean up security settings and avoid these types of errors.
Why can't I see business process events in Worker History?	Ensure that a security group to which you belong has *View All* or *View Completed Only* access in the business process security policy for each event you want to see. In addition, you need to have access to

	the appropriate security domain to see the Worker History.
How does Workday determine which business process definition to use?	Often, the logic Workday uses to determine which business process definition to use may be unclear. You can determine the business process definition Workday used by selecting Business Process > View Definition from the related actions menu of a business process event. There are multiple reasons why Workday may select a specific business process definition. In some cases, when you hire a position, the position may reside in two organizations. Example: The default definition of the *Hire* business process allows the business process to be associated with both types of organizations. Workday uses organization type precedence to determine where to look first for the business process definition to use. If Workday does not find a custom business process defined in the organization with the highest priority, it looks in the organization defined next in the precedence list. If there is no custom business process defined in any organization in the precedence list, Workday uses the default business process definition for the organization with the highest priority. For more information, see Maintain Organization Type Precedence on page 1013. In addition, Workday uses the default business process definition if the organization's business process definition is in any of the following states on the date the event started: • It has critical errors. • It is inactive. • It is not effective on the date the event started. To view the business process definition as of the date the event started, view the business process definition and enter the event start date in the Effective Date field.
What if a condition rule is not triggering as expected?	Test the condition rule as follows: • If the step has multiple conditions, test each condition 1 at a time to ensure they each work as expected. • If the condition has multiple rules, test each rule 1 at a time. • Make sure that the data values included in the condition rule match the data on the event itself. Example: ◦ If the condition rule checks to see if the country equals Japan, then make sure the event is using a supervisory

	• organization that has a location where the country is Japan. • If you create condition rules on Worker-based fields in the *Hire* business process, but the *Hire* event is not yet complete, the pre-hire is not yet an employee, so the condition rules may not be valid. To determine the values of each field at the time the step was executed, select Reporting > Report Fields and Values from the related actions menu of the business process step. Look at the values of each field used in the condition rule to determine why the rule does not work as expected. You can also create a custom report directly from the business process event and place the fields in the condition rules (especially calculated fields) to see what values they have. This can help you determine where the condition rule is breaking. For more information on how condition rules work, see Concept: Step Conditions on page 960. For more information on creating a contextual report, see Create Reports from Business Object Instances.
What if a task does not go to the intended person?	Review the data associated with the event to find the objects on which the security group is assigned. Because role-based security groups can be assigned to multiple objects, you should look at: • Supervisory organizations • Location hierarchies • Pay group • Any other custom organizations assigned to the worker or supervisory organization. Look at the membership of each type of security group. For intersection and aggregation security groups, you should review the members of both security groups to find common members.
How can I delete comments from a business process?	Business Process Administrators can remove 1 or more comments from a business process, either before or after the business process is completed. From the related actions menu of the overall business process (not from a business process step), select Business Process > Remove Comments. Select the check box next to each comment that you want to remove, and then click OK. Similarly, if a comment has been made on a subprocess, you can remove the comment as

	a related action on the subprocess, not from an individual step within the subprocess.
How do I find appropriate fields for creating condition rules?	If a field you need is not available when you create a condition rule, you can use the Workday Data Dictionary report to determine what fields are available for each *business object*. You can also create a calculated field and bring it up to the Action Event level.

User Experience

My Tasks

Concept: My Tasks

Workday enables workers to find, organize, and complete tasks quickly by using My Tasks.

You can use My Tasks to:

- View All Items to see all pending tasks assigned to you. My Tasks displays up to 20,000 tasks in the All Items view.
- View the Archive to see all tasks that you resolved in the last 90 days.
- Search for tasks using a combination of search parameters.
- Create up to 100 saved search queries that categorize tasks based on the search parameters.
- Filter tasks using specific criteria.
- Access the My Delegations report to view and manage task delegations.
- Approve items in bulk.
  - Workday recommends using a filter to view tasks that you can approve in bulk. When you view tasks in All Items or in a saved search, the Bulk Approve tab might display when you don't have any items to approve in bulk.
  - To determine if a business process supports bulk approval, use the Business Process Configuration Options report.

Automatic Task Refresh

My Tasks automatically remove tasks from your view once you complete them and adds any new tasks it finds at the time of the refresh. After the refresh, My Tasks updates the number of items in your task view to reflect the addition or removal of tasks.

If any step of a business process creates an asynchronous workflow transaction, your task list might not update automatically with the next step in the process. You might need to refresh My Tasks manually. Example: When you submit a task for a business process configuration that includes a Generate Document step, you might need to refresh My Tasks manually to receive the document.

Date Views

From the Display Options menu, you can select a Date View option to change how you want to view the date that you received a task. Use the:

- Absolute Date option to view the calendar date on which you received the task. Example: 09/14/2023.
- Relative Date option to view how long ago you received a task. Example: 5 days ago.

Search

You can search for tasks across all items, in the archive, or within filters, using these search types:

Search Type	Description
Title Search	Search task titles using the search field. You don't need to use case-sensitive terms or exact word order in your searches. You can use Title Search as a delegate on business processes.
Advanced Search	Use additional task and date range parameters to refine your search further. The Assignment and Step parameters aren't available when using Advanced Search in the archive. You can use Advanced Search as a delegate on business processes.
Saved Searches	Use a saved search to categorize tasks automatically based on the search parameters. When you create and save a search, you can access it from the Saved Searches tab. You can create and use saved searches only in All Items. You can't share saved searches.

Workday displays the tasks that match your search criteria in the central panel of My Tasks. You can select a task in the list to take the necessary actions.

Filters

Workday enables you to configure filters in My Tasks based on:

- Business process type.
- Custom conditions.
- Maximum row count.

Example: As the manager of a team, you can create a condition where you filter out expense item approvals greater than 50 USD from your My Tasks view.

Task	Description
Create My Tasks Filter	Personal My Tasks filters apply to 1 or more business processes or tasks. You can't share these filters.
Create My Tasks System Filter	My Tasks system filters enable you to include or exclude 1 or more business processes from My Tasks. Only administrators can create and share these filters with others through security groups.

You can also create a Favorites filter for easy access to specific tasks. To add tasks to your Favorites filter, click the star icon next to each task that you want to access quickly.

You can set a filter that you create or a system filter as your default filter in My Tasks. The default filter also filters the tasks that display on the Awaiting Your Action card on the Home page. To set your default filter, access My Account > Change Preferences from your profile. In the Workflow Preferences section, select the filter that you want as your default from the Default My Tasks Filter prompt. To view the default filter in My Tasks, sign out of Workday, sign in again, and then open My Tasks.

Workday recommends that you configure a security policy for the *Self Service: My Tasks Filter* domain in the System functional area so that you can prevent external users, such as extended enterprise learners, from accessing your custom filters. Security groups must have View permissions on this domain to create personal filters.

You can view My Tasks filters using these reports:

- My Tasks Filters
- My Tasks System Filters

Related Information
Reference
2023R2 What's New Post: My Tasks
2023R1 What's New Post: My Tasks
2022R2 What's New Post: My Tasks
The Next Level: Transitioning to My Tasks: The Inbox Reimagined
The Next Level: User Success Platform - Guidance Workspace

Example: Create a My Tasks Filter to Share with Others

Context

Global Modern Services (GMS) recently changed their policy around requesting time off by asking that employees enter:

- Days as the value when taking 1 or more days off.
- Hours when taking less than 1 full day off.

Employees should follow this guidance so that HR Administrators can accurately report on how much time off employees are requesting.

As an HR Administrator, you want to help employees submit time off requests correctly. You create a My Tasks filter to display requests that:

- Are greater than 8.
- Use hours as the value.

This filter identifies incorrectly submitted requests. You want to share this filter with all managers and their managers to ensure that approvers send back requests that don't adhere to the new guidelines.

Prerequisites

Security: *Business Process Administration* domain in the System functional area.

Steps

1. Access the Create My Tasks System Filter task.
2. Enter these values:

Field	Enter
Description	*Time Off Requests > Than 8 Hours*
Maximum Row Limit	*50*

3. From the Include Business Process Type(s) prompt, select *Request Time Off*.

4. Select these values in the Conditions grid:

And/Or	Source External Field	Relational Operator	Comparison Type	Comparison Value
And	Time Off Total Units - Hours	greater than or equal to	Value specified in this filter	8

5. From the Usage Restrictions prompt, select:
   - *Manager*
   - *Manager's Manager*

Result

GMS managers and their managers can easily identify time off requests submitted incorrectly by selecting *Time Off Requests > 8 Hours* from their My Tasks filters. Managers can use this filter to ensure accurate reporting on time off requests.

Example: Create a Personal My Tasks Filter

Context

As the manager for a team of 35 people in California, you recently asked that your team:

- Purchase a new leadership book that costs 29.99 USD.
- Submit expense reports for the book by the end of the month.

You have many tasks come through each day and want to prioritize these expense reports from your team. You also prefer to look at a small number of items at a time.

To help declutter your My Tasks view, you want to create a filter that displays:

- Expense item approvals that are under 30 USD.
- No more than 20 items at a time.

Prerequisites

Security: *Self Service: My Tasks Filter* domain in the System functional area. You must have both View and Modify permissions to this domain.

Steps

1. Access the Create My Tasks Filter task.
2. Enter these values:

Field	Enter
Description	*Expense Filter - 30 and Under*
Maximum Row Limit	*20*

3. From the Business Process Type(s) prompt, select *Expense Report Event*.
4. Select these values in the Conditions grid:

And/Or	Source External Field	Relational Operator	Comparison Type	Comparison Value
And	Expense Report Total Amount in USD	less than	Value specified in this filter	30

Result

You can now select the *Expense Filter - 30 and Under* filter from your My Tasks filters.

People Experience

Home Page

Steps: Set Up Workday Home

Prerequisites

To use videos on the Workday Home page, such as in announcements, you might need to take additional steps to set up Media Cloud based on your organization's subscription service agreement. See Getting Started with Media Cloud.

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

You can set up the Workday Home page to enable your employees to access engaging company information from a central place by providing a home page and search result experience. You can customize the Home page to display curated:

- Announcements.
- Cards, which link to different areas in Workday.
- External links.
- Worklets.

Steps

1. Enable the People Experience functional area.

   See Steps: Enable Functional Areas and Security Policies.

2. Edit Domain Security Policies.

   Grant security groups permissions to *Set Up: People Experience Configuration* domain in the People Experience functional area:

   - *Set Up: People Experience Configuration*. Enables you to customize the Home page.
3. Activate Pending Security Policy Changes.
4. Select Home Cards Workspace located in the System Admin report to:

   - Add and publish cards to the Home page in the Added Cards section.
   - Configure various sections of the Home page that includes Extend cards, Important Dates, and Onboarding in the Work Tools section.

   Grant security groups permissions to *Set Up: People Experience Configuration* domain in the People Experience functional area:

   - *Set Up: People Experience Configuration*. Enables you to customize the Home page.

   See Concept: Home Page Workspace on page 1224.

   Security: *Set Up: People Experience Configuration* domain in the People Experience functional area.
5. Select Home Page Settings located in the System Admin report to customize certain sections of the home page.

   a. Select Enable My Tasks to display the Awaiting Your Action section on the Home page.
   b. Once you select Enable My Tasks, you have the option to select Disable Hiding that restricts users from hiding inbox items on the Home page.
   c. Select Enable Top Apps (Do Not Use) to display the first 4 apps or worklets from the View All Apps section that you want to display from the global navigation menu.
   d. Select either Hire Date or Continuous Service Date from the Anniversary Display Date for the Anniversary for Worker card to indicate the type of date you want to display on your workers' home page.

   Security: *Set up: People Experience Configuration* domain in the People Experience functional area.
6. (Optional) Access the Manage Tenant Search Sources task to select which product categories display in the Federated Search.
7. (Optional) Access the Maintain Time Off Plan Balance Display Priority for Search task.

   Enter priorities for time off plan balances that you want to display in the Your Time Off Summary card. Workday delivers these personalized results as part of the Smart Summaries feature.

   See Steps: Set Up Time Off Plans.
8. Steps: Enable Quick Actions on Workday Home on page 1216.
9. Access the Maintain Dashboards report.

   To add required and recommended worklets and external links to the Home dashboard, click Edit and select the Content tab.

   See Steps: Set Up Dashboards and Landing Pages on page 310.

   Security: *Set Up: Tenant Setup - Worklets* domain in the System functional area.
10. (Optional) Add Home and Dashboard Announcements on page 312.
11. (Optional) Brand your Workday tenant with custom images and color.

    See Steps: Set Up Tenant Branding on page 482.
12. (Optional) Steps: Enable Intelligent Answers.

Related Information

Tasks

Steps: Set Up People Experience for Workday Student

Reference

Workday Community: Available Innovation Services – Service Descriptions and Exhibits

2021R2 What's New Post: People Experience Workspace
2022R1 What's New Post: People Experience Home Page
The Next Level: People Experience: Configure Workday Home
2022R2 What's New Post: People Experience Home Page
../../../tenant-configuration/tenant-branding/nko1524254441640.dita
2023R1 What's New Post: Smart Summaries
2023R1 What's New Post: Quick Tasks Enablement on Home
2023R2 What's New Post: User Experience Survey for Workday
2025R1 Feature Release Note: Home Workspace in the System Admin Hub
2025R1 Feature Release Note: System Admin Hub

Steps: Create External Home Page Cards

Prerequisites

Note: You must have access to Workday Journeys to create and display external links for custom cards on the Workday Home page. Contact your Customer Base Account Executive for details.

Context

External cards allow your organization to surface real-time data from third-party vendors on the Workday Home page. You can create cards that connect to third-party applications and integrations using Workday Orchestration Builder and providing workers with access to important information from the home page.

You can create external cards directly within the Home Cards Workspace. We enable you to customize the display and recurrence schedule for external cards, eliminating the need to manually update the schedules for each card.

Note: External cards aren't available for Workday Student.

Steps

1. Enable People Experience.

   See Steps: Set Up Workday Home on page 1213.
2. Enable the Journeys functional area.

   See Steps: Enable Functional Areas and Security Policies.
3. Edit Domain Security Policies.

   Configure security policies for these domains in the Journeys functional area:

   - *Set Up: Custom Card*
   - *View: Custom Card*
4. Create a Workday Today Card template in Workday Orchestration Builder.
5. Access the Home Cards Workspace report.

   Click Add Card.

   Click Create External Card to access the Create External Card task.

   As you complete the task, consider:

Option	Description
Who Can View	Create or select the condition rule to control who can view the card. The card displays on the Home page for any employee secured to the *View: Custom Card* domain in the Journeys functional area.

Option	Description
Workday Today Card Orchestration	Select an orchestration from the menu options.
First appears on	Enter the date that you want the card to start appearing on the Home page.
and disappears on	Enter the date that you no longer want the card to display on the Home page.
Repeats every	Select the recurrence schedule.
Display summary	Explains the display schedule based on your selection.

See Concept: Home Page Workspace on page 1224.

Security: *Set Up: Custom Card* domain in the Journeys functional area.

6. Select your new card from the Available Cards list and click Add.
7. Select Publish on the card in the All Cards grid to display it on your workers' Home page.
8. (Optional) Access the Edit External Card Condition Rule task to edit the condition rules that applies to the external cards.

Related Information
Reference
The Next Level: Deep Dive into Custom Cards for Journeys

Steps: Enable Quick Actions on Workday Home

Prerequisites

Workday recommends to opt in to to Global Navigation Sidebar. It'll remove the Top Apps from the Workday Home page when you enable it. Refer to Global Navigation Sidebar for more details.

Context

You can add, remove, and reorder the most commonly used tasks by your users. These tasks will automatically display on the Quick Actions section on the Home page.

Your users can view up to 10 tasks, reports, or external links at the top of the Home page, giving them direct access to frequently used items.

Steps

1. Access the Home Page Settings and click Edit Quick Actions to add, remove, or reorder the actions your users see.
2. Add external links such as Quick Links or SAML SSO links to the list for your users to access external systems or pages.

3. Add a maximum of 25 items and a minimum of 3 items. Workday automatically delivers tasks such as:
    - Payslips (Mobile Only)
    - Check In (Web, Mobile)
    - My Time Clock History (Web)
    - Schedule Workers (Web)
    - My Schedule (Web, Mobile)
    - Enter Time for Worker (Web)
    - Review Time (Web)
    - Edit and Approve Time (Web)
    - Enter My Time (Web)
    - Enter My Time (Mobile)
    - Submit My Time (Web)
    - My Org Chart (Web)
    - Feedback on my Team (Web, Mobile)
    - Request Absence (Web)
    - Time Off Balance (Web)
    - My Payslips (Web, Mobile)
    - Create Expense Report (Web)
    - Total Rewards (Web, Mobile)
    - Give Feedback (Web, Mobile)
    - My Development Items (Web, Mobile)
    - Feedback Received (Web, Mobile)
    - Find Jobs (Web)
4. Configure condition rules from the Rule column on the Configure Quick Actions task that allows you to apply an existing condition rule to a quick action. To add a rule:
    a) Access the Home Page Settings task.
    b) Select Edit Quick Actions.
    c) In the Rule field, add the rule you want to apply.

Result

- If an external link has a rule already configured in the Maintain Quicklinks or Edit SAML SSO Link tasks, that rule will populate automatically.
- If you want to remove the rule from the external link in Quick Actions, you must also remove it from the other configuration tasks.
- Your existing configuration in the Configure Quick Actions task will have no impact if you don't add a new rule.

Next Steps

You can reload the home page in your Workday tenant to display the configured Quick Actions for your users.

Related Information
Reference
Workday Community: Available Innovation Services – Service Descriptions and Exhibits
Workday Community: Workday Machine Learning
2025R1 Feature Release Note: Home Workspace in the System Admin Hub
2025R1 Feature Release Note: System Admin Hub
2025R2 Feature Release Note: Quick Actions on Workday Home
2025R2 Feature Release Note: Condition Rules for Quick Actions on Home

Steps: Enable Enhanced Tasks and Reports in Search

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

You can enable enhanced tasks and reports in the search user experience to increase the amount of search queries that return tasks and reports for users in the search results. Enhanced tasks and reports utilizes advanced search capabilities, including semantic search and large language models, to improve the search experience.

In the Top Results and Tasks and Reports search result categories, enhanced tasks and reports:

- Recognizes more search queries that return relevant tasks and reports.
- Ranks and displays up to 5 of the top tasks and reports specific to a user's search query.

Note: Workday does not require you to enable Workday Assistant for users to access this feature.

Steps

1. Enable Innovation Services Features and Machine Learning Data Contributions.

   On the Innovation Services Opt-In task, select the Workday Assistant service on the Available Services tab in the People Experience category.

   On the Maintain Innovation Services Data Selection Opt-In task, access the People Experience: Workday Assistant category and select the check box next to Task and Report Data.
2. To display enhanced tasks and reports in the Top Results category in the Workday Assistant card and in the Tasks and Reports category, set up Workday Assistant. See: ../../../../human-capital-management/hcm-innovation-services/workday-assistant/mxv1531925007265.dita.

Result

After enabling enhanced tasks and reports in the search user experience, Workday displays additional relevant tasks and reports in the search results based on the user's query.

Note: It can take up to 7 days for enhanced tasks and reports to display in the search results. The data model requires additional time to ingest task and report data after initially opting in.

Example

Next Steps

Related Information

Concepts

Concept: People Experience on page 1220

Reference

25R1 Feature Release Note: Tasks and Reports in Search

Steps: Enable Intelligent Answers

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

You can enable Intelligent Answers to use machine learning and automatically suggest relevant Workday Help articles when your users enter search queries.

Steps

1. Enable People Experience.

   See Steps: Set Up Workday Home on page 1213.
2. Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers.

   Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

   On the Innovation Services Opt-In task, select the User Experience Machine Learning check box in the People Experience category.

   On the Maintain Innovation Services Data Selection Opt-In task, select the Knowledge Management Articles check box in the People Experience: User Experience Machine Learning category to contribute data for Machine Learning.

   Security: *Manage: Innovation Services* domain in the Innovation Services functional area.

3. Access the Edit Tenant Setup - Machine Learning task.

   Select the region in which Workday hosts data used for improvement and personalization of machine learning and analytics functionality.

   Security: *Set Up: Tenant Setup - Machine Learning* in the System functional area.
4. Edit Domain Security Policies.

   Grant security groups permissions to the *Help Intelligent Answers Access* security domain in the People Experience functional area.

Result

Workday will begin using machine learning to display and suggest relevant Help articles when users enter search queries.

Note: It can take up to 2 weeks for Intelligent Answers to initially display and suggest Help articles.

Related Information

Concepts

Concept: Intelligent Answers on page 1227

Reference

Workday Community: Intelligent Answers

23R2 What's New Post: Intelligent Answers

Concept: People Experience

People Experience is a suite of features that provides employees with a central place to engage with company information through various types of offerings. You can customize each employee's experience so they can see relevant information when they need it.

Features included in People Experience:

- Workday Home
- Workday Search
- Workday Journeys
- Touchpoints

Workday Home

Workday Home delivers a personalized home that serves people timely insights and actions, curating what Workday has to offer. We want to minimize the effort administrators need to configure and create an innovative user experience for them.

Feature	Description
Workday Home	The home page provides a curated experience for all your workers. The home page displays information through content such as suggested tasks, transactions, announcements, reports, and insights through cards, journeys, and worklets. You can customize the content that displays for your workers based on security permissions. The home page displays content in these sections: • Announcements • Awaiting Your Action • Important Dates • Extend Cards

Feature	Description
	• Onboarding Timeline • View Onboarding Plan • Quick Actions • Recommended For You • Team Highlights • Timely Suggestions • Your Top Apps

Workday Search

Workday Search enables employees to use a powerful user-friendly search engine on Workday Home to find information that's most relevant for them.

Feature	Description
Search Categories	You can select and save categories to display first in the search results under Saved Categories. Workday automatically displays these categories: • Articles • People • Tasks and Reports • Learning
Search Tips	You can view search tips that enable you to find articles more easily.
AI Enhanced Search	You can access a new search results user interface that uses Workday Assistant to display personalized search results. When enabled, AI Enhanced Search displays: • An optimized search results page user interface. • A Workday Assistant summary powered by AI. The summary provides personalized search results for common search queries. Example: *my team's hire* date and *my location*. You can enable and disable AI Enhanced Search with the Simplified Search toggle at the top of the search results page. Note: You need to have Workday Assistant enabled in your tenant to display the Workday Assistant Summary.
Smart Summaries	You can access personalized data in the search results. Smart Summaries displays: • The Time Off Summary when you search for terms related to time off. The summary displays your time off balance,

Feature	Description
	upcoming time off, upcoming holidays, and a link to request time off and view all time off balances. Example: You search for "PTO" in Workday and the Time Off Summary displays in the search results. For managers, the summary also displays their team's upcoming time off and company holidays. • The Pay Summary when you search for terms related to pay. This summary displays your most recent pay and a link to view all past payslips. Example: You search for "paycheck" in Workday and the Pay Summary displays in the search results
Intelligent Answers	Uses machine learning to display and suggest the most relevant Knowledge articles based on your search query. You can: • Enter full sentence search queries. • Use the article feedback functionality to train and improve Intelligent Answers over time.
Enhanced Tasks and Reports in Search	Enhanced tasks and reports displays: • Additional tasks and reports related to a user's specific search query in the Tasks and Reports search results category. • Up to 5 of the top tasks and reports for a user's specific search query in the Top Results search results category.
Change Preferences Task	You can select the *Classic Workday Search* experience or the new *New Workday Federated Search* experience.

Workday Journeys

Workday Journeys enables you to guide your employees through their critical professional and personal milestones through an immersive experience. It provides you with a robust toolset to distribute and manage both Journeys and External Cards for your users.

You can create external cards in Workday Extend using the Orchestration Builder tool.

Feature	Description
Journey Paths	Guide and support employees through steps and suggestions as they navigate the critical professional and personal moments that matter the most. Journey step types include Documents, External links, Help articles, Learning content, To do's, Videos, and Workday tasks. With journeys, you get:

Feature	Description
	• A flexible network that supports a wide range of use cases. Example: Transition to Manager. The Transition to People Leader journey gives the employee knowledge, experience, and confidence to be a successful manager. • Personalized experiences are powered by condition rules. • Tools to continuously measure the impact of curated experiences. Your users can click their journeys in the Awaiting Your Action section on their Workday home page to see the status of their journeys such as : • Active Journeys • Completed Journeys
External Cards	You can create connections to external sites using workflow tooling that display within cards on the Workday Home page. You have the context and guidance on what a user might need to do at any given time.

Touchpoints

Feature	Description
Workday Assistant	You can view articles and create cases in Workday Assistant. To use Workday Assistant, you must subscribe to Innovation Services.
Workday for Microsoft Teams and Workday for Slack	When you ask a question in your workspace that returns multiple results, Workday displays an option to search articles for more information. To use Knowledge Management in your Slack or Microsoft Teams workspace, you must set up Workday Assistant.

Related Information

Concepts

Setup Considerations: Journeys on page 1265
Concept: Intelligent Answers on page 1227
Concept: People Experience for Workday Student

Tasks

Steps: Set Up Journeys on page 1271
Steps: Set Up Workday Assistant
Steps: Enable Intelligent Answers on page 1219

Reference

The Next Level: Journey Paths
24R1 What's New: Related Tasks in Search
24R1 What's New: Smart Summaries for Managers

24R2 Feature Release Note: AI Enhanced Search

Concept: Home Page Workspace

The Home workspace in the System Admin Hub provides a single place for home page configurations.

- Home Cards Workspace provides you with a central location to create and configure home page cards.
- Home Page Settings allows you to customize certain sections of the home page.

Added Cards

Workday displays published and unpublished cards on the Added Cards table. By clicking the header on Added Cards, you can sort the data in a meaningful order for analysis.

You can click to add a card through the Add Card button located on the right-side of the page. Cards on the Added Cards section remain unpublished to your workers' home page until you select the Publish option on the card. You can Publish, Unpublish, and Remove multiple cards all at once. You must edit and complete all required fields for external cards before you can publish the card to the Home page.

You can't change which section cards and links display in. You can also preview how the cards display on the Workday home page. You can select the card and then the Preview option from the Actions button on the right side of the grid. You can only preview some Workday-delivered cards.

You can sort the cards in the Added Cards and Available Cards table that enable you to search, edit, and organize your cards more easily.

These cards provide workers with access to information from a central place and display in:

- Recommended For You
- Timely Suggestions

You can also create an external card by selecting the Create External Card option from the Available Cards section.

You can click the Resources icon on the top-right corner of the page that has links to:

- What's New in Cards (What's New in Workday)
- Cards Admin Guide (Workday Administrator Guide)

Work Tools

Work Tools provides a single location to configure various sections on the home page that includes Extend Cards, Important Dates, and Onboarding.

You can click Edit Work Tools located on the right side top corner of the Home Cards Workspace report to add and configure the Workday-delivered and Extend cards on both desktop and mobile. You can sort and arrange the Extend Cards, Important Dates, and Onboarding in an ascending or descending order.

Extend Cards	Enables an administrator to add the Extend Cards when a developer deploys an extend app containing extend cards to the tenant. They: • Display snapshots of information. • Enable actions about a specific topic. • Provide end-users quick access to Extend app capabilities. Extend Cards can also be surfaced in other entry points including Workday Journeys, Workday-delivered Hubs, and Search.

	Note: You must subscribe to the Workday Extend SKU to create and display Extend Cards on the Workday Home page.
Enable Onboarding	Displays the Onboarding Timeline widget when: • Onboarding functional area is enabled. • Onboarding timeline is enabled. • User has an active onboarding plan. Enable/disable Onboarding only displays on the home page when Onboarding functional area is enabled.
Important Dates	Selects the events that can be viewed in the Important Dates section. • Birthdays • Anniversaries • Time offs • Holidays

Workday-Delivered Cards

The cards display on the Workday home page for workers with security access to the:

- Domain that secures the card.
- Tasks and reports that the card links to.

Example: When you add the Expiring Certifications card on the Home page, only workers with access to the Edit Certification task and the *Self-Service: Certifications* domain in the Talent Core functional area can see the card.

You can edit the title, subtitle, and display a customized schedule of some of the Workday-delivered cards.

When editing a card, the Time Before Event and Time After Event fields control the display time frame of the card. The event refers to the date on which the card is anchored to display to the user.

Example: The event for the Birthday for Worker card is the user's birthday, and the event for the Anniversary for Worker card is yearly based on the user's hire date.

Example: Betty wants the View Check-ins card to display for employees for 2 weeks.

Betty edits the View Check-ins card and selects these values:

- Time Before Event: *2 weeks before*
- Time After Event: *On the day of the event*

Workday then displays the card for 2 weeks before the user's check-in date until the actual day of the check-in date.

You can customize the display schedules on the Edit Card task. When you select the Use Custom Schedule field, it enables you to override the automatic display schedule for the Workday-delivered cards.

The fields that enable you to specify exact dates and recurrence schedules are:

- First displays On
- First Disappears On
- Repeats Every

The Display Summary field summarizes your configured display schedule.

Home Page Settings

You can consider what you want to display on your Home Page Settings tab.

Option	Description
Enable My Tasks	Displays the 3 most recent My Tasks on the Home page.
Disable Hiding	Removes the ability for the user to hide My Tasks on the home page.
Enable Top Apps (Do Not Use)	Displays the first 4 apps on the Home page.
Anniversary Display Date	Selects the Anniversary Date to display in the Timely Suggestions section. • Hire Date • Continuous Service Date

External Cards

You must have access to Workday Journeys to use external cards. External cards aren't available for the Workday Student product.

The external cards that you publish to the Workday home page display for employees that either:

- Have access to the *View: Custom Card* domain in the Journeys functional area, or
- Meet the condition rules that apply to the external card.

Related Information
Reference
2021R2 What's New Post: People Experience Workspace
2022R1 What's New Post: People Experience Workday-Delivered Cards
2022R2 What's New Post: Preview of People Experience Workday-Delivered Cards
2023R1 What's New Post: Home Page Workspace
2023R1 What's New Post: Quick Tasks Enablement on Home
2023R2 What's New Post: User Experience Survey for Workday
2024R1 What's New Post: Home Cards Workspace
2023R2 What's New Post: Cards with Due Dates
2025R1 Feature Release Note: Onboarding Experience on Workday Home
2025R1 Feature Release Note: New Workday Onboarding Experience
The Next Level: Understanding the New Onboarding Plans Experience
2025R2 Feature Release Note Extend Cards on Workday Home

Concept: Home Page Cards

You can use the Home Cards Workspace report located in the System Admin Hub to add cards to users' home pages. You can't change which section each card displays in the Workday home page. Users must have security access to the:

- Domain that secures the card.
- Tasks and reports that the cards link to.

Workday enables you to display select information to users. View these topics to learn more about the home page cards available for each functional area:

- Reference: Absence Management Cards
- Reference: Benefits Cards
- Reference: Compensation Cards

- Reference: Financials Cards
- Reference: HCM Cards
- Reference: Help Cards
- Reference: Inventory Cards
- Reference: Learning Cards
- Reference: Payroll Cards
- Reference: Productivity Cards
- Reference: Projects Cards
- Reference: Recruiting Cards
- Reference: Student Cards
- Reference: Talent Cards
- Reference: Time Tracking Cards
- Reference: Workday Peakon Employee Voice Cards

Related Information

Reference

The Next Level: Maximizing the User Experience

Concept: Intelligent Answers

Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

Intelligent Answers uses machine learning to automatically display and suggest relevant Workday Help articles when users enter a search query in Workday.

Extracting Question and Answer Pairs

Intelligent Answers extracts question and answer pairs from text, streamlining your HR processes.

The process of extracting question and answer pairs using Intelligent Answers involves these steps:

1. Context Extraction: Intelligent Answers uses a specific process to understand the context of each word in relation to all the other words in the sentence.
2. Prediction: The model predicts what it believes is the correct answer to a posed question, based on the content and the context that it extracted from the text.
3. Evaluation and Refinement: Intelligent Answers evaluates for accuracy and calibrates the model to increase its proficiency over time.

Optimized Article Content and Formatting

The structure, language, and formatting of your Workday Help articles affect the performance of Intelligent Answers. Understanding the model's operations enables you to predict its performance more accurately.

Articles that contain these attributes enable optimized performance for Intelligent Answers:

- Structured Layout: The content follows a structured layout. Each section is clearly defined and delimited, making it easier for Intelligent Answers to parse the information.
- Clear and Concise Language: Sentences are shorter, and each one focuses on a single idea. The language is simple and straightforward, enabling Intelligent Answers to better understand the content.
- Use of Common Vocabulary: The article doesn't contain uncommon jargon and provides explanations where necessary. This approach ensures that Intelligent Answers can effectively understand the text, regardless of its original training corpus.
- Detailed Context: The article provides clear context around the questions and answers, such as preceding a key point with a question or using formatting to clearly indicate the answer. This setup makes it easier for Intelligent Answers to correctly match questions with the corresponding answers.

Articles with optimized content and formatting make the extraction process more effective, as the model can better understand the structure of the text, differentiate between the sections, and pick up on clear and succinct language.

Problematic Article Content and Formatting

Articles that lack structure and use complex language can hinder the extraction process, resulting in less accurate results.

Articles that contain these attributes present challenges to the current Intelligent Answers model:

- Unstructured text: Text that lacks a clear structure, such as consistent headings or list formats, make it difficult for Intelligent Answers to differentiate between different sections of the content or to identify key points.
- Lengthy Sentences: Intelligent Answers can struggle with very long sentences, especially those that contain multiple ideas or concepts. Lengthy sentences can prevent the model from identifying the main point and determining the correct answer.
- Complex Jargon: Overuse of industry-specific jargon or acronyms can pose challenges. Intelligent Answers is trained on a broad corpus of text. While it understands a wide range of language, too much niche vocabulary can interfere with its comprehension.
- Lack of Context: If the article doesn't provide enough context around the questions and answers, it's difficult for the model to correctly match questions with corresponding answers.

You're an HR Administrator at at Global Modern Services (GMS) and want to create a Workday Help article to describe the current benefits to your employees. You quickly create a new article without considering the attributes and structure recommended for Intelligent Answers:

Benefits in a company setting are a critical part of employee engagement and retention, notably in a competitive market. Things like, say, the 401(k) matching program, comprehensive health plans, and flexible paid time off are just a few examples of what we can offer. Meanwhile, other perks like comprehensive EAP (Employee Assistance Program) are not that uncommon either. PTO (Paid Time Off) days have their role too, as well as childcare services and tuition reimbursement programs. Perks such as these make our company a competitive player in the field, hence aiding our employee retention rate significantly. Therefore, a well-structured benefit program is imperative to maintain high employee morale, particularly if we aim to keep top talent within the organization.

You learn that your new article doesn't initially appear when your users search for related terms in Workday. You revise your article to have the appropriate structure and recommended attributes for Intelligent Answers:

What are the key benefits that we offer to our employees?

- 401(k) Matching Program: We provide a 401(k) matching program to help our employees secure their future.
- Comprehensive Health Plans: Our employees have access to various health plans, ensuring they receive the medical care they need.
- Flexible Paid Time Off: We understand the importance of work-life balance. Our flexible PTO policy ensures our employees have ample time to rest and recharge.
- Employee Assistance Program (EAP): Our comprehensive EAP provides support to employees during times of personal or work-related challenges.
- Childcare Services & Tuition Reimbursement: We offer childcare services and tuition reimbursement programs to support our employees' personal and professional growth.

By offering such benefits, we aim to increase employee engagement, retention, and overall satisfaction.

Related Information
Tasks
Steps: Enable Intelligent Answers on page 1219

Concept: Custom Search Topics

You can use custom search topics to provide a centralized space to create, edit, and delete search links for specific topics. You can configure search topics to fit your tenant's needs and maximize the findability of your links, tasks, custom reports, or extend cards.

Note: You can find custom search topics only using a simplifed search.

The Maintain Search Topics task uses the same security domains as those for Edit Tenant Setup - Assistant that provide access to Workday Assistant. See Steps: Set Up Workday Assistant.

You can:

- Create a custom search topic that links users to external links, standard tasks, custom reports, or Extend Cards through admin-defined queries.
- Edit currently delivered assisted search topics to link to an external source, a different task, a custom report, or an Extend Card.

A custom search topic consists of:

- A name and a description field to define and identify the custom topics you create.
- Search Query fields to define different phrases and questions that you want your topic to surface.
- Options to configure 1 of these as a link or card to surface:
  - Extend Card
  - External link
  - Workday standard task
  - Custom report
- Workday displays a card on the Simplified Search page for the user when they have security permissions forthe linked topic.

You can access the Maintain Search Topics task to edit custom search topics.

Related Information
Concepts
24R2 Release Note: Custom Search Topics

Reference: Manager Experience on the Home Page

You can identify managers through security permissions and have Important Dates and Team Highlights sections surface on their home page.

You can use the View User Types report to view the identified user type(s) for your users. The report is secured to 1 of these domains:

- *Security Configuration*
- *Set Up: People Experience Configuration*

You can use this topic to help you make decisions when planning your configuration for your managers. It enables managers to better support and understand their direct reports' needs. Managers have the ability to:

- Provide their direct reports with the best opportunities and support to help them succeed in their current role and achieve their career goals.
- View and get timely insights about their team's career progress and activities.

Important Dates

Event	Domain	Tasks and Reports	Description	Display Time Frame
Anniversary	*Worker Data: Anniversaries/ Birthdays Reports* *Worker Data: Current Staffing Information*	N/A	Notifies a manager when 1 of their direct reports has an upcoming work anniversary.	Upcoming anniversary in the next 30 days based on hire date or continuous service date.
Birthday	*Public Profile Preferences: Birthday*	N/A	Notifies a manager when 1 of their direct reports has an upcoming birthday.	Upcoming birthday in the next 30 days. Respects the Public Profile settings of the user to opt in or opt out of sharing their birthday.
Holiday	*Self Service: Time Off* *Self Service: Leave of Absence*	Team Absence Calendar	Displays when there's an upcoming holiday. This holiday pertains to the manager's holiday, and not their direct reports.	Upcoming holidays in the next 30 days.
Time Off	*Worker data: Time Off (Time Off Manager View)*	Team Absence Calendar	Surfaces when a manager's direct report takes time off.	Upcoming time off in the next 30 days.

You can disable any of these events by accessing the Home Page Settings on the System Admin report and unchecking the event in the Important Dates section.

You can hide the entire section on the home page by disabling all the events.

Team Highlights

Insight	Domain	Tasks and Reports	Description	Display Time Frame
Development Items Overdue	*Worker Data: Development Items*	Development Items	Notifies a manager when 1 of their direct reports has development items overdue.	Displays when: • An item is past the completion date through day 30.

Insight	Domain	Tasks and Reports	Description	Display Time Frame
				• Status displays as In Progress.
Goals Overdue	*Worker Data: Employee Goals*	• View Goal • View Worker Goals • View Goals for Worker	Notifies a manager when 1 of their direct reports has an overdue goal.	Displays when: • An item is overdue through day 30 after it's overdue. • Status is incomplete or partially complete.
Feedback Received	*Worker Data; Role Requested Feedback* *Worker Data; Self Requested Feedback*	View Feedback Received	Notifies a manager when their employee receives feedback from someone at the workplace.	Displays at the time that an employee receives feedback through 2 weeks after the feedback was given. The feedback has to be public or shared with the manager. The manager must have access to the security groups listed in the Domain column.
Required Learning Due	*Person Data: Learning*	My Team's Learning	Notifies a manager when their employee has Required Learning due.	Displays when you have learning assignments with an open status. Required courses display 2 weeks before the due date for 1 or multiple required courses due. Additionally, for multiple required learning assignments, these will display once they're assigned.
Upcoming Check-In	*Self -Service: Check-in*	View: Check-In	Notifies a manager when	Displays 2 weeks prior to the check-

Insight	Domain	Tasks and Reports	Description	Display Time Frame
	Worker Data: Check-in		they have an upcoming career check-in with their direct report.	in date through the actual check-in date.

Insights display 1 at a time for a direct report based on the priority:

- Required Learning Due
- Goals Overdue
- Development Items Overdue
- Upcoming Check-In
- Feedback Received

Related Information

Reference

2024R1 What's New Post: Team Highlights for Managers on Workday Home

2023R2 What's New Post: Manager Experience on Workday Home

2025R1 Feature Release Note: Home Workspace in the System Admin Hub

2025R1 Feature Release Note: System Admin Hub

Reference: Home Page Sections

Workday displays greetings based on the user's local time. These sections on the Home page enable you to add personalized content to help users navigate easily to the various tasks and reports within Workday, as well as external links.

Section	Description
Announcements	Displays the announcements carousel at the top-right section of the home page. Your users can see 1 announcement at a time but are able to navigate through the announcements after clicking into them by selecting the right or left arrows. We update the thumbnail to the last announcement clicked by your user when viewing them on the Workday home page.
Awaiting Your Action	Displays up to 4 of the most recent items. • The top 2 items are My Tasks. • The 3rd item displays journey details, if applicable; otherwise, it displays a card. • The 4th item displays a card, if applicable. If there's no journey item or cards to display, then the top 3 items from My Tasks display on your home page. If there are more cards to display, you can expand the section via the View More button. The cards are sorted by the earliest due dates. Additionally, the cards displaying in the Awaiting Your Action section no longer have the sub-title option. This simplifies the action, and aligns with the other items in this section. You can enable/disable this section by selecting the Enable My Tasks check box from Home Page Settings.

Section	Description
	After you select Enable My Tasks, Workday displays the Disable Hiding check box that enables you to prevent users from hiding My Tasks preview items. Workday still displays Journey previews when you have access to Workday Journeys. The Go to My Tasks button in the Awaiting Your Action section provides you: • A direct link from the Awaiting Your Action section to your My Tasks. • A view of the total number of My Tasks items from the Home page. Managers can also click the Quick Review button in the Awaiting Your Action section to review and approve select transactions.
Important Dates	Displays for the manager: • Birthdays, Anniversaries, Time Off, and Holidays for the managers' direct reports. • Holidays for the manager. You can disable any of these events by accessing the Work Tools section on the System Admin report and unchecking the event in the Important Dates section.
Onboarding Timeline	Displays the Onboarding Timeline for the users' active Onboarding Plan on the top-right of the home page. This section displays when: • The Onboarding functional area is enabled. • The Enable Onboarding field on the Work Tools section is enabled. • User has an active onboarding plan.
Quick Actions	Displays up to 10 tasks, reports, or external links at the top of your home page. Provides users with direct access to frequently used items. You can add, remove, and reorder the most commonly used tasks by your users. You can also apply existing condition rules to a quick action by using the Rule from the Edit Quick Actions button in the Home Page Settings page.
Recommended For You	Displays these 2 cards automatically: • Explore Org Chart • View Your Profile You can personalize this section by adding 1 or more relevant cards, or removing this section by unpublishing the cards.
Team Highlights	Displays for a manager: • 4 of their direct reports with the option to view a total of 8. • Effortlessly navigate to their profiles. • Gather relevant insights related to their team. • Navigate to the org chart. Publish the Required Learning card to display the required learning insight on the manager's home page in the Team Highlights section.
Timely Suggestions	Displays up to 3 cards automatically with an option to view more cards.

Section	Description
	Workday displays an empty section when you haven't added cards that map to this section on the Home Cards Workspace report.
Work Tools	Displays up to 4 Extend cards, Important Dates, and Onboarding sections on desktop and mobile. You can click Edit Work Tools located on the top right side on the Work Tools section and: • Add and configure the Workday-delivered and Extend cards on both desktop and mobile. • Sort and arrange the Extend cards, Important Dates, and Onboarding sections in an ascending or descending order. Note: The configuration is automatically available on the Home Cards Workspace report if you've opted into the System Admin Hub.
Your Top Apps	Displays the first 4 apps or worklets from the View All Apps section and the global navigation menu. You can enable this section by selecting the Enable Top Apps (Do Not Use) check box from the Home Page Settings tab on the System Admin report. Note: When you opt-in to the Global Navigation Sidebar in the Edit Tenant Setup - System, the Your Top Apps section is removed from the home page.

Related Information

Reference

Reference: Home Page Sections for Workday Student

2022R1 What's New Post: Your Top Apps on the Home Page

2023R2 What's New Post: Manager Experience on Workday Home

2024R1 What's New Post: Relocate Announcements on Workday Home Page

2023R2 What's New Post: Cards with Due Dates

2025R1 Feature Release Note: Onboarding Experience on Workday Home

2025R1 Feature Release Note: New Workday Onboarding Experience

The Next Level: Understanding the New Onboarding Experience

FAQ: Workday Home

This topic contains frequently asked questions about the Workday home page.

How can I configure where the sections are on the home page?	You can't configure the location of each section on the home page; however, you can select to enable or disable some of these sections from the Home Page Workspace. See Concept: Home Page Workspace on page 1224 Concept: Home Page Workspace on page 1224 for more details. You can now customize the layout of the Work Tools section on the home page. You can reorder Onboarding, Important Dates, and any custom Extend Cards using the Work Tools configuration in the Home Cards Workspace. Work Tools display beneath the Announcements on the home page.

How can I apply my company branding to my home page?	You can select to display a custom banner, logo, and colors to your tenant by accessing the Configure Tenant Branding task. See Reference: Recommended Image Sizes for Tenant Branding on page 483 for branding information and recommended image sizes.
Why is Quick Tasks being replaced by Quick Actions?	Workday is replacing the machine learning-powered Quick Tasks section with the new Quick Actions section. Quick Actions allows administrators to configure frequently used tasks, reports, and external links that'll appear on the Home page. This gives you more control over the user experience by enabling you to add, remove, and reorder the most commonly used tasks. On the Configure Quick Actions task, you can use the Rule column to apply an existing condition rule to a quick action. Workday recommends opting in to the Global Navigation Sidebar. It removes Top Apps from the Workday Home page and gives you 1 click access to all your navigation from the Home page and all pages within Workday. You can refer to the Global Navigation Sidebar for details.
How does Quick Actions and Global Navigation Sidebar function together to provide a better user experience?	The global navigation side bar and quick actions were designed together to give customers flexibility. The intention of quick actions is to provide admins a way to pull out tasks/actions that are often embedded within hubs/dashboards to make them easily accessible from the home page. Example: Benefits and pay hub can be in side bar navigation, while you can make view payslip a quick action so users don't have to navigate to the hub to view their recent pay information.
What is the best practice to navigate through Workday?	You can use the Global Navigation Menu that displays on the top-left corner of the page to access consistent navigation. The menu includes tasks, reports, and applications anywhere in Workday. The Add Apps and Edit options allow users to add, remove, and reorder menu items within the same category. If you know the name of the person or task/report you're looking for, you can use the search at the top. Otherwise, you can review the actions and insights on the home page to complete important tasks and browse suggestions.
How can I enable insights and card content on the home page?	There are a variety of insights that you can enable to display on the home page. See concept--home-page-cards.dita for a list of all these insights. You can navigate to the Home Cards Workspace to Add and Publish them. You can also go to the System Admin report and click the Settings page located in Workday Home to enable and disable certain sections. You can refer to:

	• Reference: Home Page Sections on page 1232 • Steps: Set Up Workday Home on page 1213
Which users can see the Team Highlights and Important Dates sections?	Workday now automatically identifies managers to determine whether to display the Team Highlights and Important Dates sections. For the Team Highlights section to display, the user must have: • Access to direct report data. • Minimum 1 direct report. Access the View User Types report and click the Search by User button to learn how users are identified as managers. To view the View User Types report, you must have configuration access to 1 of these security domains: • *Set Up: People Experience Configuration* that enables you to customize the home page. • Security: *Security Configuration* domain in the System functional area.

Related Information
Reference

2024R1 What's New Post: Relocate Announcements on Workday Home Page

2025R1 Feature Release Note: Home Workspace in the System Admin Hub

2025R1 Feature Release Note: System Admin Hub

Example: Create External Home Page Cards Orchestration

This example illustrates how to set up an orchestration that displays data on a custom home page card.

Note: You must have access to Workday Journeys and Workday Extend to create and display external links for custom cards on the Workday Home page. Contact your Customer Base Account Executive for details.

Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

Context

You want to create a custom Workday Home Card that displays a greeting to the user viewing the card.

Prerequisites

Orchestration Builder is a tool on the Workday Developer Site. To build custom cards, you need to:

- Have access to Workday Extend.
- Have technical skills, knowledge, and capabilities.
- Be familiar with APIs.

Steps

1. Log into the Workday Developer Site with your credentials.
2. Click Create an Extend App, then click Start from Scratch.
3. Name your app and, optionally, provide a description. Click Create and Go to Overview.
4. Click Add Orchestration and then select the Workday Home Card template.

5. Name your orchestration.
6. From the Components panel, drag Send Workday API Request and drop it between Workday Home Card Request and CREATE WORKDAY HOME CARD.
7. Select the Send Workday API Request component you just dropped and:
   a) Double-click SendWorkdayAPIRequest to rename this step to *Get Workday Employee Data*.
   b) On the Properties panel, enter a Reference Name of *getWorkdayEmployeeData*.
   c) Click Edit Properties.
8. Enter these values.
   a) On the `GET` request row, click the + icon, and paste `/common/v1/workers/me`.

      This API request returns the worker who is viewing the card.

      Note: You must return a specific worker or else the API request won't work.
   b) Select *Json* as the Response Type on the Settings tab.
   c) Click Save Changes, then click Close.
9. From the Components panel, drag Create Values and drop it between SEND WORKDAY API REQUEST and CREATE WORKDAY HOME CARD. Select the Create Values component you just dropped and:
   a) Double-click CreateValues to rename the step to *Create Workday Employee Data*.
   b) On the Properties panel, enter a Reference Name of *createWorkdayEmployeeData*.
   c) Click Edit Properties.
10. Enter these values:

Option	Description
Type	*String*
Key	*fullName*
Value	• Click the + icon and then select Data from Orchestration Steps > Send Workday API Request > response. • Hover over getWorkdayEmployeeData.response, click the fx icon, and select stringAtJsonPath. • Click path and enter `$.descriptor` to return the name of the worker viewing the card.

11. Click Save Changes, then click Close.
12. Select CREATE WORKDAY HOME CARD and click Edit Properties.
13. Enter these values:

Option	Description
Source	*Workday Extend*
Title	• Click the + icon and enter *Hello*. • Click the + icon again and select Data from Orchestration Steps > Create Values > fullName.
Subtitle	*Have a great day!*
Link Description	*https://www.workday.com*

Option	Description
Link Text	*Workday*

14. Click Save Changes, then click Close.
15. Click the Validate icon.
16. Click Save to App Hub.

Result

You create content for Workday Home tailored specifically to your organizational needs, and incorporate Workday data as well as third-party data to make a truly personalized experience.

Next Steps

Deploy the app to your tenant and access the Create External Card task in Workday to enable workers to view the card.

Related Information

Concepts

Concept: People Experience on page 1220

Concept: Workday Extend

Tasks

Steps: Create External Home Page Cards on page 1215

Reference

The Next Level: Deep Dive into Custom Cards for Journeys

Example: Change My Home Contact Information

Change My Home Contact Information

Context

This example illustrates how the Change My Home Contact Information card disappears from your home page when you complete the contact information change. The Workday administrator publishes the Start My Performance Review card with a custom schedule that displays for 2 weeks at the start of every quarter.

Betty doesn't want to see cards lingering on her home page once she takes action on them. As an administrator, you want to set up the Change my Home Contact Information card to display on Betty's home page for only 2 weeks at the start of every quarter. Once Betty takes action, the card disappears from her home page.

Prerequisites

Security: *Business Process Administration* domain in the Help functional area.

Steps

1. Access the Home Cards Workspace report, click the Add Card button and search for the Change My Home Contact Information card from the Available Cards list.
2. Select the Change My Home Contact Information card and click Add.
3. Click the card row to display the drop-down menu, and select Edit.
4. On the Edit Card task screen, select the Use Custom Schedule checkbox.
5. Access the Display Schedule section and enter the First Appears On date as 04/01/2023.
6. Enter the First Disappears On date as 04/14/2023 to set the display interval as 2 weeks
7. Set the Repeats Every field to 3 months to make the display repeat every 3 months.

8. Select the Publish Card on Home checkbox in the Publish section, on the Edit Card page.
9. Click OK to save the edits.

Result

When Betty logs in on 04/01/2023, she sees the Keep Your Home Contact Information Updated card on the home page. Since Betty recently moved her residence, she clicks the card and updates her address. However, she can't recollect her new zip code so she clicks Save for Later. The Keep Your Home Contact Information Updated card disappears from the home page as she has taken action. Since she hasn't completed the task, a new item gets added to My Tasks.

Betty forgets to enter the new zip code.

Next quarter, on 07/01/2023, the Keep Your Home Contact Information Updated card displays again on the home page. This time Betty clicks the card, enters her zip code, and saves the change. The card and the prompt in My Tasks disappear completely from the home page.

Related Information

Concepts

Concept: Home Page Workspace on page 1224

Tasks

Steps: Set Up Workday Home on page 1213
Steps: Create External Home Page Cards on page 1215

Example: Start My Performance Review

Start My Performance Review

Context

The Workday administrator publishes the Start My Performance Review card with a custom schedule that displays for 1 month from 1st April to 30th April and repeats every 6 months.

This example illustrates how the Start My Performance Review card behaves differently based on the user's actions in 2 diferent scenarios.

Betty doesn't want to see her Start My Performance Review card lingering on her home page after she has started the process. As an administrator, you want to create a Start My Performance Review card for your users that's published from April 1st to April 30th of the year and then repeats every 6 months on a recurring schedule. You also want the Start My Performance Review card to disappear from the home page once Betty takes action.

Prerequisites

Security: You must have access to the *Start My Performance Review* task to view this card.

Steps

1. Access the Home Cards Workspace report, click the Add Card button and search for the Start My Performance Review card from the Available Cards list.
2. Select the Start My Performance Review card and click Add.
3. Click the card row to display the drop-down menu, and select Edit.
4. On the Edit Card task screen, select the Use Custom Schedule checkbox.
5. Access the Display Schedule section and enter the First Appears On date as 04/01/2023.
6. Enter the First Disappears On date as 04/30/2023 to set the display interval as 1 month.
7. Set the Repeats Every field for 6 months.
8. Select the Publish Card on Home checkbox in the Publish section, on the Edit Card page.
9. Click Ok to save the edits.

Result

When Betty logs in on April 1st, 2023, the Start My Performance Review card displays on her home page. She clicks the card and starts her performance review. The card disappears from the home page since she's taken action.

Once Betty initiates the Start My Performance Review task, it moves to her My Tasks. However, she forgets to finish her performance review. The task remains in the Awaiting Your Action section.

After 6 months, the Start My Performance Review task appears on Betty's home page. Betty gets notified of the outstanding task she has to complete. She decides to finish her outstanding performance review from My Tasks but after submitting, she still sees the Start My Performance Review card on her home page for the current period. She clicks the card to start a new performance review for the current review period. After submitting the performance review for the current period, the card no longer displays on her home page.

Home Page Cards
Reference: Absence Management Cards

Upcoming Time Off

Displays upcoming approved time off and leaves of absence for the next 30 days. Time off requests are submitted through the Absence Calendar Experience, the legacy Time Off and Leave Calendar or the legacy Absence Calendar display, depending on which calendar an employee can access. Leave of absence requests only display on the Team Absence Calendar and aren't included in the display if an employee only has access to the Time Off and Leave Calendar.

Feature	Description
Security	*Self Service: Time Off*
Tasks and Reports	• Manage Absence • Request Time off
Section	Timely Suggestions
Display Time	30 days before the start of your time off.
Edit Capability	None

View Upcoming Team Absences (ESS)

Displays upcoming approved time off within 30 days for the ESS Team Absence Calendar. Click the link on the card to see a complete list of your peers who are taking time off or leave of absence.

Feature	Description
Security	*Self Service: Team Absence Calendar*
Tasks and Reports	Request Time Off
Section	Timely Suggestions
Display Time	30 days before the start of your time off.
Edit Capability	You can change the title and subtitle.

View Upcoming Team Absences (MSS)

Displays upcoming approved time off within 30 days and leaves of absence for the MSS Team Absence Calendar. Click the link on the card to see a complete list of all team members who are taking time off or leave of absence.

Feature	Description
Security	*Worker Data: Team Absence Calendar*
Tasks and Reports	• Manage Absence • Request Time Off
Section	Timely Suggestions
Display Time Frame	30 days before the start of your time off.
Edit Capability	You can change the title and subtitle.

Expiring Accruals

Displays accruals that expire within 30 days that have balances remaining as of the accrual expiration date. Click the link on the card to open the My Expiring Accruals report to see all accrual expiration events where the units to expire are greater than 0 as of today.

Feature	Description
Security	*Self-Service: Time Off Balances*
Tasks and Reports	My Expiring Accruals
Section	Timely Suggestions
Display Time Frame	30 days before the expiration of the accrual for accruals with balances remaining as of the accrual expiration date.
Edit Capability	You can change the title and subtitle.

Reference: Benefits Cards

Change 1095-C Printing Election

Displays for workers that haven't selected the electronic print option. This card also enable workers to change their printing preferences to electronic.

Feature	Description
Security	*Self-Service: Benefits (My Tax Documents) - USA*
Tasks and Reports	Change 1095-C Printing Election
Section	Recommended For You
Display Time	November through January.
Edit Capability	None

Evidence of Insurability Reminder

Reminds workers to submit their evidence of insurability for benefit events.

Feature	Description
Security	*Self-Service: Benefits*
Tasks and Reports	Complete Your Evidence of Insurability
Section	Timely Suggestions

Feature	Description
Display Time	When an employee submits elections within the last 30 days and is awaiting evidence of insurability.
Edit Capability	None

OE Submit Benefit Changes Reminder

Reminds workers to submit pending changes for open enrollment events.

Feature	Description
Security	*Self-Service: Benefit Elections*
Tasks and Reports	Change Open Enrollment
Section	Timely Suggestions
Display Time	When an employee makes changes to an existing Employee Open Enrollment Event but hasn't submitted the changes. Applies only to previously submitted events that no longer display in the employee's My Tasks.
Edit Capability	None

Reference: Compensation Cards

My Compensation Review Statement is Available

Provides you with easy visibility on your compensation updates. Your users can access the My Compensation Review Statement is Available card from their desktops only, and not on their mobile applications.

Feature	Description
Security	*Self Service: Benefits and Pay Hub* *Self Service: Compensation Review Statement*
Tasks and Reports	My Compensation Review Statement History Compensation Review Statement History
Section	Timely Suggestions
Display Time	When there’s a compensation event, including a compensation review. Displays on the user's home page from the date that the statement is visible for 1 week.
Edit Capability	You can: • Create a custom schedule. • Change the title and subtitle. • Update the Time Before Event and Time After Event fields.

My Compensation Update

Provides you with easy visibility on your compensation updates. Your users can access the My Compensation Update card from their desktops only, and not on their mobile applications.

Feature	Description
Security	*Self Service: Compensation* *Self Service: Compensation History* *Self Service: Benefits and Pay Hub* *Self Service: Total Rewards*
Tasks and Reports	Total Rewards My Compensation History My Compensation Summary
Section	Timely Suggestions
Display Time	When there’s a compensation event, including a compensation review. Displays on the user's home page from the date that the statement is visible for 1 week.
Edit Capability	You can: • Create a custom schedule. • Change the title and subtitle. • Update the Time Before Event and Time After Event fields.

Reference: Financials Cards

Add Credit Card Transactions to Expense Report

Enables you to add open credit card transactions to expense reports.

Feature	Description
Security	*Manage: Expense Report for Pre-Hire* *Process: Expense Report - Core* *Self Service: Expense Report*
Tasks and Reports	Create Expense Report My Expense Reports
Section	Timely Suggestions
Display Time	When you haven't added your credit card transactions to an expense report.
Edit Capability	None

Expenses Hub (Desktop)

Redirects you to the Expenses Hub, which you can use to access tasks and reports to manage your expenses.

Feature	Description
Security	*Self-Service: Credit Card* in the Common Financial Management functional area. In the Expenses functional area: • *Self-Service: Expense Report* • *Self-Service: Receivable Repayments* • *Self-Service: Spend Authorization* • *Self-Service: Travel Booking*
Section	Awaiting Your Action
Display Time	When you have any of these expense types: • Cash advances with outstanding balances. • Credit card transactions, quick expenses, and travel booking records that you haven't yet expensed. • Expense reports and spend authorizations that you've yet to submit, including any sent back by reviewers and approvers. • Expense reports with negative balances.
Edit Capability	None

Expenses - Expenses That Need Attention (Mobile)

Redirects you to the Expenses mobile page, from which you can add credit card transactions, quick expenses, and travel booking records to expense reports. From the Expenses mobile page, you can also submit in-draft and sent-back expense reports.

	Description
Security	*Self-Service: Credit Card* *Self-Service: Expense Report* *Self-Service: Travel Booking*
Section	Timely Suggestions
Display Time	When you have: • Expense reports to submit. • Credit card transactions, quick expenses, and travel booking records that you haven't yet expensed.
Edit Capability	None

From the Expenses mobile page, you can also submit in-draft and sent-back expense reports.

Expenses - Cash Advance Balance Owed (Mobile)

Reminds you that you have an outstanding cash advance balance to repay.

Feature	Description
Security	*Self-Service: Spend Authorization*

Feature	Description
Section	Timely Suggestions
Display Time	When you've 1 or more cash advances with outstanding balances that you need to repay.
Edit Capability	None

Expenses - Expense Balance Owed (Mobile)

Reminds you that you have 1 or more negative-balance expense reports to repay.

Feature	Description
Security	*Self-Service: Receivable Payments*
Section	Timely Suggestions
Display Time	When you've a negative-balance expense report that you need to repay.
Edit Capability	None

Expenses - Spend Authorizations to Submit (Mobile)

Reminds you that you need to submit 1 or more spend authorizations.

Feature	Description
Security	*Self-Service: Spend Authorization*
Section	Timely Suggestions
Display Time	When you have spend authorization that: • You need to submit. • Reviewers or approvers have sent back to you.
Edit Capability	None

View Requisition Cart

Reminds you that you have an incomplete requisition order.

Feature	Description
Security	*Process: Requisition - Create/Edit* *Self-Service: Requisition*
Tasks and Reports	View Cart
Section	Timely Suggestions
Display Time	When you have an item in your cart.
Edit Capability	None

Reference: HCM Cards

Anniversary for Worker

Displays upcoming team anniversaries for a manager's organization.

Feature	Description
Security	*Worker Data: Anniversaries/Birthday Reports*
Tasks and Reports	My Team Anniversaries
Section	Timely Suggestions
Display Time	Displays anniversaries between today and the following Saturday. Example: If today is 27th December, 2022, then the card displays anniversaries between 27th December, 2022, and 7th January, 2023.
Edit Capability	None

Birthday for Worker

Displays upcoming team birthdays for a manager's organization.

Feature	Description
Security	*Worker Data: Anniversaries/Birthday Reports*
Tasks and Reports	Birthdays for this week and next Send Email Note: You have the option to send an email if there's only 1 upcoming birthday.
Section	Timely Suggestions
Display Time	Displays birthdays between today and the following Saturday. Example: If today is 27th December, 2022, then the card displays anniversaries between 27th December, 2022, and 7th January, 2023.
Edit Capability	None

Change My Emergency Contacts

Reminds you to update your emergency contact information. You can also configure access for these roles:

- Academic affiliates.
- External committee members.
- Retirees.
- Terminated workers.

Feature	Description
Security	This card is for the *Change Emergency Contacts* business process that you can secure through a business process definition.
Tasks and Reports	Change My Emergency Contacts
Section	Timely Suggestions
Display Time	Always. Disappears from the Home page for 6 months once the user completes the action on the card.
Edit Capability	You can: • Create a custom schedule. • Change the title and subtitle.

Change My Home and Work Contact Information

Reminds you to update your home and work contact information. You can also configure access for these roles:

- Retirees.
- Terminated workers.

Feature	Description
Security	This card is for the *Contact Change* business process that you can secure through a business process definition.
Tasks and Reports	Change My Contact Information
Section	Timely Suggestions
Display Time	Always. Disappears from the Home page for 6 months once the user completes the action on the card.
Edit Capability	You can: • Create a custom schedule. • Change the title and subtitle.

Change My Home Contact Information

Reminds you to update your home contact information. You can also configure access for these roles:

- Retirees.
- Students, except for students with only external academic records.
- Terminated workers.

Feature	Description
Security	This card is for the *Home Contact Change* business process that you can secure through a business process definition.
Tasks and Reports	Change My Home Contact Information

Feature	Description
Section	Timely Suggestions
Display Time	Always. Disappears from the Home page for 6 months once the user completes the action on the card.
Edit Capability	You can: • Create a custom schedule. • Change the title and subtitle.

Change My Work Contact Information

Reminds you to update your work contact information. You can also configure access for these roles:

- Retirees.
- Students, except for students with only external academic records.
- Terminated workers.

Feature	Description
Security	This card is for the *Work Contact Change* business process that you can secure through a business process definition.
Tasks and Reports	Change My Work Contact Information
Section	Timely Suggestions
Display Time	Always. Disappears from the Home page for 6 months once the user completes the action on the card.
Edit Capability	You can: • Create a custom schedule. • Change the title and subtitle.

Explore Org Chart

Enables workers to view their team organization structure.

Feature	Description
Security	*Reports: Navigate Organization* *View: People-View Org Chart*
Tasks and Reports	Org Chart
Section	Recommended For You
Display Time	Always.
Edit Capability	You can: • Create a custom schedule. • Change the title and subtitle.

View Your Profile Card

Enables workers to view and manage the information that displays on their profile.

Feature	Description
Security	*Current Staffing Information* *Worker Data: Public Worker Reports*
Tasks and Reports	View Worker Profile
Section	Recommended For You
Display Time	Always.
Edit Capability	You can: • Create a custom schedule. • Change the title and subtitle.

Reference: Help Cards

Help Multiple Cases

Displays when an employee has more than 2 active Help cases.

Feature	Description
Security	*Self Service: Help Case Management*
Tasks and Reports	View My Cases
Section	Timely Suggestions
Display Time	Doesn't display for cases that have been resolved or canceled 7 or more days previously.
Edit Capability	None

Help Single Case

Provides quick access to an employee's active Help cases and displays status updates. Displays when the employee has 2 or fewer active cases.

Feature	Description
Security	*Self Service: Help Case Management*
Tasks and Reports	View Case
Section	Timely Suggestions
Display Time	Doesn't display for cases that have been resolved or canceled 7 or more days previously.
Edit Capability	None

Reference: Inventory Cards

Edit Recall Response-Inventory

Reminds you to finish responding to an impacted inventory location order by recall alert.

Feature	Description
Security	*Process: Recall Response - View*
Tasks and Reports	Edit Recall Response - Inventory
Section	Awaiting Your Action
Display Time	When there's an open high priority recall alert.
Edit Capability	None

Edit Recall Response-Issue

Reminds you to finish responding to an impacted issue order by recall alert.

Feature	Description
Security	*Process: Recall Response - View*
Tasks and Reports	Edit Recall Response - Issue
Section	Awaiting Your Action
Display Time	When there's an open high priority recall alert.
Edit Capability	None

Edit Recall Response-Par

Reminds you to finish responding to an impacted par location by recall alert..

Feature	Description
Security	*Process: Recall Response - View*
Tasks and Reports	Edit Recall Response - Par
Section	Awaiting Your Action
Display Time	When there's an open high priority recall alert.
Edit Capability	None

Edit Recall Response-Purchase Order

Reminds you to finish responding to an impacted purchase order by recall alert.

Feature	Description
Security	*Process: Recall Response - View*
Tasks and Reports	Edit Recall Response - Purchase Order
Section	Awaiting Your Action
Display Time	When there's an open high priority recall alert.
Edit Capability	None

Reference: Learning Cards

Required Learning

Displays required learning that's due soon.

Feature	Description
Security	*Learning Access*
Tasks and Reports	Required Learning
Section	Awaiting Your Action
Display Time	Displays when you have learning assignments with an open status. Required courses display 2 weeks before the due date for 1 or multiple required courses due. Additionally, for multiple required learning assignments, these will display once they're assigned.
Edit Capability	None

Reference: Payroll Cards

Payslips

Enables you to view your latest on-cycle payslips.

Feature	Description
Security	*Self-Service: Payroll (My Payslips)*
Tasks and Reports	My Payslips Payslips
Section	Timely Suggestions
Display Time	When the payslip is available to view through 4 days after the pay date.
Edit Capability	None

UK PenAE Re-Enrolment Reminder

Reminds payroll administrators that the company pension re-enrolment date is coming soon.

Feature	Description
Security	*Set Up: Payroll (Pensions) - UK*
Tasks and Reports	Add UK Pensions Re-Enrolment Details
Section	Timely Suggestions
Display Time	1 month before the next upcoming re-enrolment date recorded in the Maintain Company UK Pensions Re-Enrolment Details task. Displays until the re-enrolment date.

Feature	Description
Edit Capability	None

View Available Canadian Tax Forms

Enables Canadian workers to access their tax information.

Feature	Description
Security	*Self-Service: Payroll (My Tax Documents) - CAN*
Tasks and Reports	My Tax Documents
Section	Timely Suggestions
Display Time	When the tax document becomes available or publishes before March 15, until April 30th. If the tax form publishes after March 15, it displays for 2 months after the publish date. Example: 2023 tax documents published March 18 display until May 18th.
Edit Capability	None

View Available P60

Enables UK workers to access their tax information.

Feature	Description
Security	*Self-Service: Payroll (My Tax Documents)*
Tasks and Reports	My Tax Documents
Section	Timely Suggestions
Display Time	From the P60 publication date, for 30 days from the new tax year.
Edit Capability	None

View Available W-2Cs

Enables U.S. workers to access their tax information.

Feature	Description
Security	*Self-Service: Payroll (My Tax Documents) - USA*
Tasks and Reports	My Tax Documents
Section	Timely Suggestions
Display Time	When W-2Cs are available until April 15th. Or, if available after February 15th, displays for 2 months.
Edit Capability	None

View Available W-2s

Enables U.S. workers to access their tax information.

Feature	Description
Security	*Self-Service: Payroll (My Tax Documents) - USA*
Tasks and Reports	My Tax Documents
Section	Timely Suggestions
Display Time	When W-2s are available until April 15th.
Edit Capability	None

Reference: Productivity Cards

Drive - Lots of Changes to Your File

Workday highlights a randomly selected item that 2 or more people who aren't the owner edited within the past day in the Drive item list.

Feature	Description
Security	*Drive: Viewers*
Tasks and Reports	View Drive (with relevant item highlighted)
Section	Recommended For You
Display Time	After 3 or more users have made changes to an item. The counts of the changes expire daily. Example: • Day 1: User 1 changes an item at 7:00am; User 2 changes it at 11:00am and User 3 changes the item at 3:00pm. The card displays. • Day 2: The first update from Day 1 expires at 7:00am. The card stops displaying.
Edit Capability	None

Drive - Use Group Sharing

Workday highlights a randomly selected item that you shared with more than 50 individual people in the Drive item list.

Feature	Description
Security	*Drive: Owner*
Tasks and Reports	View Drive (with relevant item highlighted)
Section	Recommended For You
Display Time	Less than 7 days after you shared an item with more than 50 individual people. Example: • The 51st share for an item occurs on Day 5. The card displays.

Feature	Description
	• On Day 8, if no new shares occurred for the item, the card stops displaying.
Edit Capability	None

Drive - Unopened Shared File

Workday highlights a randomly selected item shared with you that you haven't opened in over a week in the Drive item list.

Feature	Description
Security	*Drive: Viewers*
Tasks and Reports	View Drive (with relevant item highlighted)
Section	Timely Suggestions
Display Time	More than 7 days but fewer than 14 days after someone shared an item with you, but that you haven't yet opened.
Edit Capability	None

Reference: Projects Cards

Project Worker Added to Resource Plan Line

Reminds project workers to enter their upcoming time off.

Feature	Description
Security	*Self-Service: Time Off*
Tasks and Reports	Request Time Off
Section	Timely Suggestions
Display Time	7 days after an employee is assigned and approved to a resource plan line.
Edit Capability	None

Reference: Recruiting Cards

Create Job Requisition from Open Positions

Enables you to create requisitions for open roles.

Feature	Description
Security	*Job Requisition Data*
Tasks and Reports	Create Job Requisition
Section	Timely Suggestions
Display Time	When there's an open position that doesn't include a job requisition.
Edit Capability	You can change the title and subtitle.

Reference: Student Cards

Create Saved Schedule

Reminds students to create a schedule for registration appointments. Displays only if the student has an academic plan.

Feature	Description
Security	*Self-Service: Registration*
Tasks and Reports	Design Schedule from Plan
Section	Timely Suggestions
Display Time	Displays for an academic period if the student has a registration appointment and published course sections for the same academic period. Stops displaying when the student has at least 1 saved schedule for the period or when the registration appointment starts.
Edit Capability	None

Grades Have Posted

Informs students that their grades are available to view.

Feature	Description
Security	*Self-Service: Academic Records*
Tasks and Reports	View My Grades
Section	Timely Suggestions
Display Time	At least 1 final grade posted for the student's registration in the academic period. Displays until 1 week after the latest final grade posted for the academic period.
Edit Capability	None

New Charges Have Posted

Informs students about new charges to their accounts after the charge assessment schedule runs.

Feature	Description
Security	*Self-Service: Student Financials*
Tasks and Reports	View Account Activity
Section	Timely Suggestions
Display Time	From the first charge assessment for the period until 2 weeks after.
Edit Capability	None

Past Due Balance Hold

Warns students that they have a hold on their account because of a balance due on their payment.

Feature	Description
Security	*Student Payment Event* business process.
Tasks and Reports	Make a Payment
Section	Timely Suggestions
Display Time	On the Hold Application Date for 1 week or until the Hold is removed.
Edit Capability	None

Payment Due

Informs students that payments are due and enable them to make a payment.

Feature	Description
Security	*Student Payment Event* business process.
Tasks and Reports	Make a Payment
Section	Timely Suggestions
Display Time	When current due charges are more than $0 until the student makes the payment.
Edit Capability	None

Payment Plan Enrollment

Enables students to sign up for a payment plan if the student doesn't already have a payment plan set up for the period. Displays if the student doesn't already have a payment plan set up.

Feature	Description
Security	*Student Payment Plan Enrollment Event* business process.
Tasks and Reports	Sign Up for Payment Plan
Section	Timely Suggestions
Display Time	Displays at the Payment Plan Sign-Up Window Start date (Academic Date Controls). Until 2 weeks after the Payment Plan Sign-Up Window Start date or until the student signs up for a payment plan for the academic period.
Edit Capability	None

Plan for Registration

Reminds students to set up their registration appointments. Displays only if Academic Plans are enabled.

Feature	Description
Security	*Self-Service: Academic Planning*
Tasks and Reports	View My Academic Plan
Section	Timely Suggestions
Display Time	Displays 6 weeks before the registration window opens (Date of Enrollment Window Start Date Control) in the academic period in which they have a plan. Displays until 4 weeks before the registration window opens.
Edit Capability	None

Program of Study Change

Displays that the student has changed their program of study. Doesn't display if the student doesn't have an academic plan. Also it doesn’t display after the admin updates the Edit Program of Study task.

Feature	Description
Security	*Self-Service: Academic Planning*
Tasks and Reports	Edit My Academic Plan
Section	Timely Suggestions
Display Time	Displays after the program of study updates, until 2 weeks after the business process completes.
Edit Capability	None

Registration Appointment is Open

Reminds students to register for courses.

Feature	Description
Security	*Self-Service: Registration*
Tasks and Reports	• Find Course Sections when students don't have saved schedules for the academic period in which they're registering. This includes the standard academic period and any nonstandard academic periods rolling up to it. • View My Saved Schedules.
Section	Timely Suggestions
Display Time	Displays if the current date is between the registration start and end dates. If the registration appointment has no end date, then the card displays for 2 weeks after the appointment start date.
Edit Capability	None

Registration Appointment Starting Soon

Reminds students that they have an upcoming registration appointment.

Feature	Description
Security	*Self-Service: Registration*
Tasks and Reports	• Find Course Sections when students don't have saved schedules for the academic period in which they're registering. This includes the standard academic period and any nonstandard academic periods rolling up to it. • View My Saved Schedules.
Section	Timely Suggestions
Display Time	From 2 weeks before the registration window until the registration window closes.
Edit Capability	None

Schedule Your Planned Courses

Reminds students if they have planned courses that aren't on their schedule. The student must already have a saved schedule.

Feature	Description
Security	*Self-Service: Academic Planning*
Tasks and Reports	View My Academic Plan
Section	Timely Suggestions
Display Time	5 days before the registration window until the registration window opens.
Edit Capability	None

You've Been Awarded Financial Aid

Enables students to view financial aid awards. Displays only if the student has a Student Institutional Financial Aid Account (SIFA) and a Financial Aid Award Package.

Feature	Description
Security	*Self-Service: Financial Aid*
Tasks and Reports	View Financial Aid
Section	Timely Suggestions
Display Time	On the Standard Start Date (SSD) of the first period in the award year. Also on the SSD of all periods with aid awarded in the award year.
Edit Capability	None

You've Updated Your Program of Study

Displays that the student has changed their program of study. Doesn't display if the student doesn't have an academic plan. Also it doesn’t display after the admin updates the Edit Program of Study task.

Feature	Description
Security	*Self-Service: Academic Planning*
Tasks and Reports	Edit My Academic Plan
Section	Timely Suggestions
Display Time	Displays after the program of study updates, until 2 weeks after the business process completes.
Edit Capability	None

Reference: Talent Cards

Add/Update Goal

Reminds workers to add and review their goals.

Feature	Description
Security	*Self-Service: Employee Goals*
Tasks and Reports	My Individual Goals
Section	Timely Suggestions
Display Time	New hires: Beginning 2 months from hire date and displays for 2 weeks. Ongoing reminder: 1 year from the hire date for 2 weeks, then every 6 months after that for 2 weeks. Disappears from the Home page once the user completes the action on the card.
Edit Capability	You can: • Create a custom schedule. • Change the title and subtitle.

Create Check-In

Reminds workers to schedule a check-in with their manager.

Feature	Description
Security	*Self-Service: Check Ins*
Tasks and Reports	Create Check-In
Section	Timely Suggestions
Display Time	Monthly until 1 day after check-in date.
Edit Capability	You can: • Update the display timeframe. • Change the title and subtitle.

Career Hub - Suggested Mentor

Reminds Career Hub users to start mentorships with saved or suggested mentors.

Feature	Description
Security	*Self-Service: Career Hub*
Tasks and Reports	Career Hub
Section	Timely Suggestions
Display Time	7 days after completing Career Hub onboarding until you start a mentorship event.
Edit Capability	None

Expiring Certifications

Displays certifications that expire soon.

Feature	Description
Security	*Self-Service: Certifications*
Tasks and Reports	Edit Certification
Section	Awaiting Your Action
Display Time	10 days before through 10 days after a certification expires.
Edit Capability	None

Give Feedback

Enables you to give feedback to your peers.

Feature	Description
Security	*Self-Service: Anytime Feedback*
Tasks and Reports	Give Feedback
Section	Recommended For You
Display Time	Every 6 months from your hire date, for 2 weeks leading up to that date.
Edit Capability	You can: • Create a custom schedule. • Change the title and subtitle.

Get Started with Career Hub

Provides users quick access to the Career Hub report to start or complete onboarding..

Feature	Description
Security	*Self-Service: Career Hub*
Tasks and Reports	Career Hub
Section	Recommended For You
Display Time	When a user has Career Hub access and has been with the company for more than 3 months,

Feature	Description
	but hasn't started or completed Career Hub onboarding.
Edit Capability	None

Manage Interests

Enables workers to manage job profiles, skill interests, career preferences, career interests, as well as travel and relocation preferences.

Feature	Description
Security	Edit Interests allowed action on the *Manage Interests* business process.
Tasks and Reports	Edit Interests
Section	Recommended For You
Display Time	Displays for 1 week on: • January 9 • April 9 • July 9 • October 9
Edit Capability	You can: • Create a custom schedule. • Change the title and subtitle.

Mentor Assignment

Reminds managers to identify and assign mentorships to employees not enrolled in mentorship events.

Feature	Description
Security	*Worker Data: Mentoring*
Tasks and Reports	Find Mentor
Section	Timely Suggestions
Display Time	When a direct report has been in their role between 3 and 4 months but doesn't have an assigned mentor.
Edit Capability	None

My Reviews

Reminds workers that they have an upcoming performance review and enables them to review previous performance reviews to prepare.

Feature	Description
Security	Users must have access to the My Reviews report to view this card.
Tasks and Reports	My Reviews

Feature	Description
Section	Timely Suggestions
Display Time	Displays for the last last 2 weeks in June.
Edit Capability	You can: • Create a custom schedule. • Change the title and subtitle.

New Suggested Skills Available

Enables workers to update their skills when they have new skill suggestions.

Feature	Description
Security	*Self Service: Skills*
Tasks and Reports	Edit Skills
Section	Recommended For You
Display Time	When a worker's profile has changes that improved skill suggestions within the last 2 weeks, but the worker hasn't updated their skills. See Reference: Skill Sources for information on the profile data that impact skill suggestions.
Edit Capability	None

Start My Performance Review

Enables workers to start a performance review from the Home page.

Feature	Description
Security	Users must have access to the Start My Performance Review report to view this card.
Tasks and Reports	Start My Performance Review
Section	Timely Suggestions
Display Time	Always. Disappears from the Home page for 1 year once the user completes the action on the card.
Edit Capability	You can: • Create a custom schedule. • Change the title and subtitle.

Update Individual Check-In

Reminds workers that they have an upcoming check-in.

Feature	Description
Security	*Self-Service: Check Ins*

Feature	Description
Tasks and Reports	Edit Check-In
Section	Timely Suggestions
Display Time	Monthly until 1 day after check-in date.
Edit Capability	You can: • Update the display timeframe. • Change the title and subtitle.

View Check-Ins

Reminds workers to check-in with their manager.

Feature	Description
Security	*Self-Service: Check Ins*
Tasks and Reports	My Check-Ins
Section	Timely Suggestions
Display Time	Monthly until 1 day after check-in date.
Edit Capability	You can: • Update the display timeframe. • Change the title and subtitle.

Reference: Time Tracking Cards

Check In/Check Out: Prevent Consecutive Check-In Enabled

Enables workers to check in and check out of work from their home page. Use this card if you've configured the time entry template to prevent matching consecutive check-ins.

Feature	Description
Security	*Self-Service: Time Clock*
Tasks and Reports	Check In Check Out
Section	Timely Suggestions
Display Time	Always. After a worker checks in, Workday displays the Check Out card. After the worker checks out, Workday displays the Check In card.
Edit Capability	None

Check In: Prevent Consecutive Check-In Not Enabled

Enables workers to check in from their home page.

Feature	Description
Security	*Self-Service: Time Clock*
Tasks and Reports	Check In

Feature	Description
Section	Timely Suggestions
Display Time	Always
Edit Capability	You can change the title and subtitle.

Check Out: Prevent Consecutive Check-In Not Enabled

Feature	Description
Security	*Self-Service: Time Clock*
Tasks and Reports	Check Out
Section	Timely Suggestions
Display Time	Always
Edit Capability	You can change the title and subtitle.

Unapproved Time - Review Time

Enables you to approve time submitted for the current pay period.

Feature	Description
Security	*Manager: Time Tracking Manager Approval*
Tasks and Reports	Review My Team's Time
Description	You must configure time approval templates to use this card.
Section	Timely Suggestions
Display Time	When you have unapproved time for a report in the current pay period.
Edit Capability	You can: • Create a custom schedule. • Change the title and subtitle.

Unsubmitted Time - Time Entry

Enables you to submit time for pay periods. Workday displays unsubmitted time for all open periods in the worker's period schedule.

Feature	Description
Security	*Self-Service: Time Calendar*
Tasks and Reports	Enter My Time
Section	Timely Suggestions
Display Time	When you have unsubmitted time for pay periods.
Edit Capability	You can: • Create a custom schedule.

Feature	Description
	• Change the title and subtitle.

Reference: Workday Peakon Employee Voice

Peakon Employee Voice Survey Notification

Displays as the New Peakon Survey Available card. This card enables you to get feedback from your workers on their workplace experience. Use the Maintain Feature Opt-Ins report and enable the Survey Enhancements feature to use this functionality.

Feature	Description
Security	*Self Service: Take Surveys*
Tasks and Reports	My Surveys
Section	Timely Suggestions
Display Time	Displays when your workers have a Peakon survey to complete.
Edit Capability	None

Team Submitted Peakon Employee Voice Surveys Reminder

Notifies managers when their team submits surveys.

Feature	Description
Security	*Self Service: Take Surveys*
Tasks and Reports	Peakon Employee Voice
Section	Timely Suggestions
Display Time	First Monday of each month for 1 week.
Edit Capability	You can: • Create a custom schedule. • Change the title and the subtitle.

Journeys

Setup Considerations: Journeys

You can use this topic to help make decisions when planning your configuration and use of Workday Journeys. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What They Are

Workday Journeys enable you to build tailored experiences, with personalized journey paths and modular cards that guide through activities. Journeys provides a personalized page with links that enable users to:

- View information.
- Complete tasks.
- Navigate to multiple sites that include Workday and non-Workday content.

When administrators distribute a journey, a Journeys announcement displays on the Home page that users see when Workday first opens.

A journey can be distributed to:

- Contingent Workers
- Employees
- Students

Business Benefits

Journeys enable you to deliver a more connected experience for journey recipients with personalized content and contextual support in moments that matter the most by:

- Distributing written information, videos, external links, and easy-to-follow guidance for administrative tasks. You can distribute journeys to a few individuals or all the members of a large organization.
- Guiding employees and students through important transitions in their lives.
- Providing administrators with a flexible way to configure and distribute tasks.
- Standardizing training and procedures across your organization.
- Tracking completion dates for procedure training.

Use Cases for Employees

You can use Workday Journeys to distribute guidance for:

- Benefits enrollment and updates.
- Crisis response.
- Employees going on parental leave or job rotation.
- Employee onboarding and termination.
- Employee transition to a new role.
- International assignment preparation.
- Training and announcements for organization and policy changes.

Use Cases for Students

You can use Workday Journeys to distribute guidance for:

- Applying and preparing for graduation.
- Applying for Financial Aid.
- Changing your program of study.
- Registering for classes.
- Requesting for leave of absence.
- Setting up payment plans.
- Studying abroad.
- Student Onboarding (This pertains to new and continuing students).
- Withdrawing from an institution.

You can use Journeys to supplement the corresponding business processes associated with the use cases listed here.

Questions to Consider

Questions	Considerations
Do you have enough staff to configure and distribute journeys?	Only an administrator can configure and distribute journeys.
Do you need to distribute multiple-step procedures or instructional information to a large organization?	The personalized pages of Journeys are easy to use, keep track of, and refer back to.
Do you have multiple audiences you want to distribute journeys to?	You can create journey builders that mix and match different journey step groups for each journey you distribute.
Do you want to help new hires stay on track and engaged by displaying Journeys during their onboarding?	You can use the Maintain Onboarding Section Configurations task to display the Journeys for You section on onboarding plans. Journeys organize key tasks and resources into a single, easy-to-navigate space, helping new hires access what they need quickly, stay on track, and remain engaged during their first weeks and beyond. This personalized experience helps them build confidence from day one and navigate their onboarding more effectively.

Recommendations

Option	Recommendations
Create step groups that customize journeys for different parts of your organization.	You can distribute journeys to different groups. Example: Supply content to different regions and organizations.
Copy step groups for reuse when you want to use some of the same information on different journeys.	Step group reuse can save time and reinforces organization consistency.
Configure notifications in the Notification Delivery Settings section on the Edit Tenant System - Notification report.	You can send both Workday-delivered and email notifications when: • You distribute a journey to an employee or a student recipient. • Your users approach the nearest due date in a journey step. Your users will get a separate notification for due dates per journey if they have multiple journeys assigned to them.
Silence notifications in the Edit Tenant Setup – Journeys task utilizing the Silence Journey Notifications check box.	You have the option of silencing the Workday-delivered notifications. To perform this task, you must: • Access the Edit Tenant Setup – Journeys task in your tenants. • Select the Silence Journey Notifications checkbox from the Journeys Notification Preferences.

Requirements

Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

Purchase the Student Journeys SKU to use journeys for student recipients. Student Journeys SKU is a separate product from the Journeys SKU and requires a separate license.

Tenant Setup

Select whether administrators can override the time zone on journeys configuration tasks on the Edit Tenant Setup - System task.

Security

These domains in the Journeys functional area:

Domains/ Sub-domains	Considerations
Self-Service: Journeys	Users with access to this domain can view journeys distributed to them. Add the *Student as Self* security group to this domain so that students can view and access the journeys distributed to them.
Set Up: Journey Administration	Users with access to this domain can create, edit, manage, and distribute journeys.
Manage: Journey Builders	Users with access to this domain can create security segments and assign security permissions to journey categories for specific users or group of users. You can access these tasks if you're secured to the *Manage: Journey Builders* domain. Users with Modify Permissions can access: • Cancel Journey • Create Journey Category • Copy Journey Step Group • Create Journey Step Group • Create Journey Video • Create Journey Condition Rule • Delete Journey Condition Rule • Distribute Journeys You must have permissions for Who Can Start the Business Process through the Edit Business Process Security Policy task along with *Manage: Journey Builders* domain access to distribute journeys. • Edit Journey Builder • Edit Journey Category • Edit Journey Condition Rule • Edit Journey Step Group • Edit Journey Video • Maintain Calculated Dates • Rescind Journey

Domains/ Sub-domains	Considerations
	• Retire Journey Users with view permissions can access: • People Experience Workspace • Preview Journey • Journeys Workspace • View All Journeys • View Journey • View Journey Builder • View Journey Category • View Journey Condition Role • View Journey Step • View Journey Step Group • View Journey Video
Manage: Journey Condition Rules	Users with permissions can access these tasks: • Create Journey Condition Rule • Delete Journey Condition Rule • Edit Journey Condition Rule • View Journey Condition Rule This is a sub-domain of *Manage: Journey Builders* domain.
Manage: Journeys Preview	Users with permissions can preview a journey. This is a sub-domain of *Manage: Journey Builders* domain.
Manage: Team's Journeys	Users (Managers) with access to this domain can view their employee journey through the View Team's Journeys report, custom reporting, or through the View Journeys task's My Team tab.
Reports: Students	Student journey administrators must have access to this domain to access the Journeys Workspace report.
Self-Service: Leave of Absence *Worker Data: Leave of Absence*	Users with access to 1 of these domains can use the events through the Due Date pop-up menu to configure the First Day of Work.
Affordable Care Act (ACA) Administration – USA *Appointee Data: HR Information for Academics* *Cosmos Reporting Domain* *Process: Payroll Settlement* *Reports: Pay Calculation Results for Worker (Payslips)* *Self-Service: Current Staffing Information* *Worker Data: Current Staffing Information*	Users with access to 1 of these domains can use the events through the Due Date pop-up menu to configure the Hire Date.

Business Processes

To distribute journeys with The Distribute Journeys task, enables you to distribute journeys to a select group of journey recipients. Create and configure the *Journey Distribution* business process definition and the business process security policy. You can distribute a journey through these business processes:

- Add Additional Job
- Change Job
- Contract Contingent Worker
- Hire
- Termination

Distributing a journey through a business process is only available for worker recipients, and not for student recipients.

Reporting

Reports	Considerations
View All Journeys	Display journey recipients, distribution methods, and status.
View Journeys	Display journeys distributed to you.
View Journey Builder	Display journey builders by name and effective date.
View Journey Category	Display journey categories.
View Journey Condition Rule	Display journey condition rules.
View Journey Step Group	Display journey step groups.

Integrations

Web Services	Considerations
• *Get Journey Builders* • *Put Journey Builder*	Enables you to: • Retrieve and create or update journey builders for journey distribution. • Edit or update manager access preferences from the journey builder web services.
• *Get Journey Categories* • *Put Journey Category*	Enables you to: • Retrieve and create or update journey categories. • Edit or update the journey category type field from the journey category web services. • Edit or update manager access preferences from the journey category web services.
• *Get Journey Condition Rules* • *Put Journey Condition Rule*	Enables you to retrieve and create or update journey condition rules for use with journey distribution.
• *Get Journey Custom Templates* • *Put Journey Custom Template*	Enables you to retrieve and create or update custom templates.

Web Services	Considerations
• *Get Journey Documents* • *Put Journey Document*	Enables you to retrieve and create journey documents on journey steps by the journey step group web services. Applies only to Document Steps step type.
• *Get Journey Due Dates* • *Put Journey Due Date*	Enables you to retrieve and create journey due dates in the editor to support event and calendar dates on journey steps by the journey step group web services.
• *Get Journey Event Service Configurations* • *Put Journey Event Service Configuration*	Enables you to retrieve and create or update existing business process step journey configurations.
• *Get Journey External Links* • *Put Journey External Link*	Enables you to retrieve and create or update journey external links on journey steps by the journey step group web services. Applies only to Link Steps step type.
• *Get Journey Full Resolution Images* • *Put Journey Full Resolution Image*	Enables you to retrieve and create or update images on journeys by the journey builders and journey step group web services.
• *Get Journey Step Groups* • *Put Journey Step Group*	Enables you to retrieve and create or update journey step groups to configure the journey builder.
• *Get Journey Videos* • *Put Journey Video*	Enables you to retrieve and create journey videos on journey steps by the journey step group web services. Applies only to Video Steps step type.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Steps: Set Up Journeys

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on

Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.

- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

- Steps: Set Up People Experience
- Configure the *Journey Distribution* business process and security policy in the Journeys functional area.

  Security: *Set Up: Journey Administration* domain in the Journeys functional area.

Context

Workday Journeys provide a guided experience for users to navigate their careers through personalized journeys. Journeys include links on the Home Page enabling recipients to:

- Complete tasks.
- Navigate to multiple sites.
- View information inside and outside of Workday.

You can distribute journeys to selected people in your organization based on the condition rules you set for each journey step group. Workday automatically saves a recipient's journey progress, enabling them to work at their own pace and easily find where they left off.

Steps

1. Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers.

   Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

   On the Innovation Services Opt-In task, select the Journeys service on the Available Services tab in the People Experience category.
2. Enable the Journeys functional area.

   See Steps: Enable Functional Areas and Security Policies.
3. Set up segmented security to enable individuals or groups to view, modify, or distribute specific journey categories.
   a) Access the Create Security Group task.

      Create a user-based security group.
   b) Access the Assign Users to User-Based Security Group task.

      Add users to the security group your created.
   c) Access the Create Security Group task.

      Create a segment-based security group.

      On the Security Groups prompt, select the user-based security group that you created.

      On the Access to Segments prompt, select security segments that you want to be able to access Journeys > Journey Category.

      Security: *Security Configuration* domain in the System functional area.

4. Edit Domain Security Policies.

   Add the segment-based security group to the *Manage: Journeys Builders* domain in the Journeys functional area.

   Grant security group permissions to these domains in the Journeys functional area:

   a. *Self Service: Journeys*
   b. *Set Up: Journey Administration*
   c. *Manage: Journey Builders*
   d. *Manage: Team's Journeys*
   e. *Manage: Journey Condition Rules*
   f. *Manage: Journeys Preview*

   Manage: Journey Condition Rules and *Manage: Journeys Preview* are sub-domains of *Manage: Journey Builders*. You can grant access to these sub-domains without requiring the user to have access to the *Manage: Journey Builders* domain.
5. (Optional) Grant security groups permissions to these domains in the System functional area:

   a. *Manage: Media*

      1. This domain gives Journeys administrators the ability to add videos.
   b. *View Drive File and Media*

      1. This domain provides a user with access to files or media items shared from the drive, without requiring the user to have access to the *Drive* domain. The access level depends on the access permissions for the drive items when they were shared.
6. Edit Business Processes on page 1005

   Create and configure the *Journey Distribution* Business Process Definition in the Journeys functional area.
7. ../../../../authentication-and-security/configurable-security/security-policies/dan1370796362110.dita.

   Configure the *Journey Distribution* Business Process Security Policy in the Journeys functional area.
8. Configure Edit Tenant Setup - Journeys.
9. (Optional) Access the Edit Tenant Setup - Journeys task. Select the Silence Journey Notifications checkbox from the Journeys Notification Preferences.
10. Activate Pending Security Policy Changes task.

Related Information

Reference

2022R2 What's New Post: Due Dates for the Journeys Editor

2023R1 What's New Post: Journeys Segmented Security on Category

2023R1 What's New Post: Guided Journeys Experience

2023R2 What's New: Image Upload on Journey Steps

2023R2 What's New Post: Custom Welcome Message

2023R2 What's New Post: Journeys Condition Rules at the Step Level

2023R2 What's New Post: Configuration Enhancements in the Journeys Editor

Workday Student: Journeys Configuration and Use Cases

2024R1 What's New Post: Create Links in the Journeys Editor

The Next Level: Leverage the Power of Workday Journeys for Workers Webinar Series

2025R1 Feature Release Note: Journeys Security to Preview a Journey

Create a Journey in the Journeys Workspace

Prerequisites

- Configure the *Journey Distribution* business process and security policy in the Journeys functional area.
- Security: *Manage: Journeys Builders* domain in the Journeys functional area.

Context

The Journeys Workspace enables you to:

- Centralize the administrator experience.
- Create and manage journeys.
- View journey metrics on current distribution information for all your journeys.
- View metrics for individual journeys and specific steps.

Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

Steps

1. Access the Journeys Workspace report.
2. Click Create Journey to enter the required information.

   You can select:

   - Start from Templates to customize journeys from the Workday-delivered templates.
   - Blank Journey to build journeys from scratch on the journey builder.
3. Drag and drop step groups and journey steps into the journeys.
4. Complete these options for your users:

Option	Description
Step Group	Select step groups in the same category as the journey. Workday presents step groups in the order that you define on the editor tab. You can have up to: • 50 step groups per journey. • 100 steps per step group.
Step Group Name	Details you enter here are only visible to you. Use this field to organize your journey configuration across builders.
Step Group Condition Rule	Details you enter here are only visible to you. Select or create a journey condition rule to determine which step groups each recipient receives on distribution. Example: When hiring new managers, you can use condition rules to select only the step groups applicable to the correct organization and location for the managers. We recommend that you verify how condition rules operate in an implementation tenant.

Option	Description
	Workday distributes any step groups without condition rules to all journey recipients.
Configuration Description	Details you enter here are only visible to you.
Step Group Display Name	Workday displays this name in distributed journeys. You can enter up to 500 characters, but Workday only displays the first 140 to recipients. You can repeat an existing step group name.
Step Group Description	Journey recipients can see this description. When you edit this description, Workday doesn't display the change in previously distributed journeys.

When you edit any of the fields in Step 4, Workday doesn't reflect the change in previously distributed journeys.

5. Complete these step types for your users:

Option	Description
Article	You can search and add articles for your users. These must be articles stored within Workday. You can view the articles only if you have appropriate domain access to the Workday Help domain.
Document	You can upload relevant documents for your users to view, download, and print on their journey steps. Workday supports these file formats: • PDF • DOC • DOCX
Extend Cards	You can search and add extend cards for your users within the journey editor once a developer deploys an Extend app containing extend cards to the tenant. This allows you to bring in data from: • Extend apps. • 3rd party applications. You have to subscribe to the Workday Extend SKU to add extend cards as a step type on journeys. Note: The Extend Cards step type is only available in the journey editor if an extend app has been deployed to your tenant.
Learning	You can search and add existing learning content for your users within Workday.

Option	Description
	You can view the learning content only if you have appropriate domain access to the Workday Learning domain.
Link	You can configure all internal and external links in the journeys editor and maintain them in the Maintain Journey External Links task.
Task	You have access to any Workday-delivered tasks and can open them in: • A new tab. • The journey context.
To Do	Enter plain text instructions for your users.
Video	Display an embedded video that your users can watch. To create a video directly from the journey editor, you can add a video step, then click Create Journey Video to upload a video from your computer or drive.

6. (Optional) Select or create a condition rule for a step group or step on the Step Group Condition Rule prompt, in the Edit Step Group section.

   Condition rules enable you to customize the content based on role, location, or organization. Workday evaluates condition rules first at the step group level and then at the step level. You can add a maximum of 50 condition rules to a journey.
7. Drag step types > steps into step groups.

   You can:

   - Reorder the steps using a mix of required and recommended steps.
   - Configure the steps on the right hand side panel.
8. (Optional) Upload an image for your journey's welcome image, step groups, and steps in the journeys editor.

   Images must be:

   - GIF, JPG, JPEG, or PNG file types.
   - 630 by 630 pixels or higher resolution.
   - Smaller than 10 MBs.
   - (Recommended) 16:9 aspect ratio for steps and 20:7 aspect ratio for the welcome page and step groups.
9. (Optional) Add due dates to each journey step.
10. Select a due date option from the Add Dates tab:

Option	Description
Event Date	Event Date based due dates are due in relation to an event, such as Journey Received Date/Time. You can configure a due date in relation to an event. You can configure a due date before or after an event takes place. Example: You select the Journey Received Date/Time event. You configure the due date 1 week after the event. When a worker receives the step on 2025-11-07, the due date is 2025-11-14.

Option	Description
	The Journey Received Date/Time event is the only event based due date available for student journeys.
Calendar Date	Calendar Due Dates configured by a Workday administrator aren't specific to the time zone in which the due date is set, but it's the absolute date for every recipient. Example: You select 2025-11-11 as the calendar due date. The due date for your users is 2025-11-11.

11. Click Check for Errors to validate your journey.
12. Click Preview to view your journey and then click the change button to preview the journey as different user types.

    You can view the journey as different user types.
13. Click Distribute to distribute the journey (Ad-Hoc) to your users.

    To distribute, you must configure the *Journey Distribution* business process definition and security policy in the Journeys functional area.
14. Additionally, you can distribute journeys through multiple distribution methods.
    - Business Process (BP): Distributes up to a maximum of 1 recipient.
    - MOM: Distributes up to 50,000 journeys.
    - Journeys Self-Service toggle: Allows you to turn self-service for a journey. Your users can discover and self-distribute in journeys you publish.
    - Journeys v1 REST web service: Enables you to distribute through an API.
15. Select Settings to view the current configuration of Journey Details and Journey Category details.

    You can configure Journey Manager Access on the Settings page.

Result

Workday:

- Displays the journey on recipient's home pages in the Awaiting Your Action section.
- Displays the View Journeys report for users with multiple journeys.

Related Information

Reference

The Next Level: Leverage the Power of Workday Journeys for Workers Webinar Series

2025R2 Feature Release Note: Extend Cards on Workday Home

2025R2 Feature Release Note: Self Service Journeys User Experience

2025R2 Feature Release Note: Journeys Distribution REST API

Concept: Journeys

Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

Journeys provide a personalized page with links and resources enabling recipients to:

- Navigate to multiple links without the need to search in Workday.
- Complete administrative tasks.
- View suggested training modules, articles, and documents.
- View video content.

- View content both inside and outside of Workday.
- View Extend cards.
- Keep a record of where find information in the future.

You can use journeys to:

- Create personalized journey content.
- Distribute journeys to individuals or entire organizations and institutions of any size through Ad-Hoc Distribute Journeys task, Mass Operation Management (MOM), a business process, and REST APIs.
- Enable your users to discover and self-distribute existing or new journeys you publish by turning on the Self-Service toggle.

After administrators configure and distribute a journey, Workday posts a journeys card icon on the Home page that displays when users first open Workday.

Example: When an employee goes on parental leave, there are a number of decisions to consider and administrative tasks to perform. A journey can guide an user through these duties and resources using individual steps they can complete at their own pace.

Journey Details

You can enter these journey details when you click either Explore Templates or Build your Journey:

- Journey Name (Required): Name of the journey. Only journey administrators can see this field.
- Journey Description: The description doesn't display to recipients. Only journey admins can see this field.
- Recipient Type: Selects either worker or student.
- Journey Category: Defines the type of journey. Select an existing category or create new to group similar journeys. This field
  - Organizes a group of similar journeys.
  - Enables administrators to configure segmented security in their tenants.
  - Enables reusability of step groups in a journey category.
- Journey Category Type: Enables administrators to assign and classify categories from the Workday-delivered category types.
- Functional Area: Assists with reporting for a customer tenant when optionally used for journey categories.

Journeys in Global Search

Your users can find all their journeys, including those from the Ad-Hoc Distribute Journeys task, Business Processes, Mass Operation Management (MOM), and self-distributed journeys using the global search bar.

Workday matches the search query to find active, completed, and retired journeys against the Journey Title and Journey Welcome Message. The search results include a Journeys category that users can pin for quick access.

Segmented Security on a Journey Category

You can create security segments and assign security permissions for a journey category. Example: Members of segment-based security groups can create, modify, or view Journeys based upon the needs of your organization.

You can create segmentation to:

- Restrict users from accessing a specific Journey Category.
- Grant access to certain individuals or groups to configure, distribute, or report on Journeys.

Add individuals or groups to the domain security policy to enable them to view and modify Journey Categories and reporting.

Add individuals or groups to the domain security policy to enable them to view and modify Journey Categories and reporting.

You must secure to *Manage: Journey Builders* in the Journeys functional area with modify permissions to edit or distribute journeys. You can refer to the Example: Create Security Segments on Journey Categories on page 1291 for details.

Related Information

Concepts

Setup Considerations: Journeys on page 1265

Reference

2022R2 What's New Post: Due Dates for the Journeys Editor

The Next Level: Leverage the Power of Workday Journeys for Workers Webinar Series

Concept: Journeys Workspace

Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

The Journeys Workspace is a dashboard that enables you to:

- Create and manage journeys, eliminating the need to search for multiple configuration tasks.
- View journey metrics, providing current distribution information for all your journeys.
- View metrics for individual journeys and specific steps for detailed analysis.

You can access the Journeys Workspace report (secured to the *Set Up: Journey Administration* domain) through global search.

All Journeys

Workday displays all the journeys configured in your tenant on the All Journeys table. By clicking the header on the All Journeys table, you can sort the data in a meaningful order for analysis, such as:

- Alphabetically
- Chronologically
- Logically

You can click the Resources icon on the top-right corner of the page that has links to:

- Journeys Templates
- Manage Category Types
- Workday Administrator Guide (Journeys topics)
- What's New Report in Workday (Release Notes)

Journey Details

You can enter these journey details when you click either Explore Templates or Build your Journey:

- Journey Name (Required): Name of the journey. Only journey administrators can see this field.
- Journey Description: The description doesn't display to recipients. Only journey admins can see this field.
- Recipient Type: Selects either worker or student.

- Journey Category: Defines the type of journey. Select an existing category or create new to group similar journeys which enables administrators to configure segmented security in their tenants, and allows for the reusability of step groups in a journey category. You can:
  - Select a journey category you want to distribute, then select the the Distribute option from the right-click menu.
  - The Journey Category and Journey Builder fields are automatically pre-filled. You have the option to manually fill in the information if you want to modify it.
- Journey Category Type: Enables administrators to assign and classify categories from the Workday-delivered category types.
- Functional Area: Assists with reporting for a customer tenant when optionally used for journey categories.

Journey Editor

You can create your Step Groups and Steps that you want to include in a journey by:

- Dragging and dropping Steps into your Step Groups.
- Dragging and dropping to reorder your steps.
- Configuring your steps in the Edit panel.
  - You can select either Admin View or Worker View tabs.

The editor displays the internal journey name field on the top-left side of the navigation panel. It also displays the Journey Category label that a specific journey is organized into.

Additionally, the journey name for recipients (Worker or Student) displays as Untitled Journey. You can navigate to the Edit panel and update the Journey Name for the intended recipient.

Select a short display name and description for your recipients.

Journey Preview

You can click Preview on a journey to preview what the journey looks like from the recipient's perspective before you distribute. You must meet the condition rules set for your journey before you can preview the journey. You can change who you preview as to meet the condition rules.

You can preview a journey by:

- Clicking that journey and selecting the Preview option.
- Selecting the worker or student whose journey experience you want to review.

You have the ability to customize the Welcome Card Title and Welcome Card Message for journeys. This allows you to set expectations or welcome an employee or a student to the journey they’re about to embark on.

The Welcome Card Title has a maximum character limit of 60, and the Welcome Card Message has a maximum character limit of 280.

Headline Metrics

You can select a journey in the All Journeys table and select Metrics to view these metrics for distributed journeys:

- *Distribution date and method.*
- *Number of recipients to whom the journey was distributed.*
- *Number of journeys that have been started but not completed, and those that have not yet been started.*
- *Total number of journeys distributed.*
- *Journey completion rates.*

Additionally, these are the other reporting options you can consider:

- View Journeys - Delivered report that gives a Journeys overview for self-service end users to see all journeys distributed to them. Includes active journeys and past/completed journeys.
- View All Journeys - Delivered report that lists configured journeys and status (by recipient) for administrators.
    - You can cancel a In progress Journeys.
- Custom Reports - Build custom reports using the Journeys report data source and several report fields available on the journey business object.

Journey Settings

You can click Settings to access:

Option	Description
Journey Details	You can edit and view the Journey Name and Journey Description fields.
Journey Category Details	You can view: • Journey Category Name • Journey Category Description • Recipient Type • Journey Category Type • Functional Area Note: Journey Category Details fields are read only on the Settings tab in the journey editor. You can navigate to All Categories and select Edit Category on a category to update fields.

Categories

You can navigate to the Categories through the Journeys Workspace report.

You can select the All Categories web page where you can:

- View all journey categories in the tenant.
- Select the Create Category button to create a custom journey category.
- Create a new journey from the Create Journey button located on the right side of each category on the All Categories page.
- View or Edit a specific category from the additional action buttons next to the Create Journey.
- Select Edit Category on a category to update fields.
- Select View on a category to view journey builders in the category.

You must have Modify permissions to *Set Up: Journey Administration* domain and *Manage: Journey Builders* to access this new Category page. You can't access this page if you have only View permissions.

Journey Distribution

Before you distribute a journey, you can click Check for Errors on the Editor tab to ensure that you've completed all required fields.

You can distribute journeys when you:

- Select Distribute in the Journeys Workspace report so that Workday can distribute the journey to a maximum of 100 recipients.
- Configure a business process Service step and specifying a *Journey Distribution Service* using a journeys-enabled business process.

- Access the Mass Operation Management task, selecting Distribute Journey as the Mass Operation Type, and then selecting a custom report for the journey distribution.
- Enable your users to discover and self-distribute existing or new journeys you publish by turning on the Self-Service toggle.
- Utilize Journeys v1 REST web service, which enables you to distribute journeys through an API.

You can use the View All Journeys report to:

- View distributed journeys.
- Change the status of an in-progress journey from the related actions menu of a journey event.

Journey Step Groups

You can drag and add step groups to the journey and then similarly, add 1 or as many steps to each step group in the journey. You can rearrange journey step groups on the Editor tab.

Note: You must:

- Limit step groups to 50 per journey.
- Include no more than 100 steps per step groups.
- Restrict condition rules to 50 per journey.

Option	Description
Step Group	Details you enter here are only visible to you. When you edit this field, Workday doesn't reflect the change in previously distributed journeys. Select step groups in the same category as the journey. Workday delivers step groups in the order that you define on the editor tab.
Step Group Name	Details you enter here are only visible to you. The name you enter in this field will change the step group.
Step Group Condition Rule	Details you enter here are only visible to you. You can select or create a journey condition rule to determine which step groups each recipient receives on distribution. Example: When hiring new managers, you can use condition rules to select only the step groups applicable to the correct organization and location for the managers. We recommend that you verify how condition rules operate in a test environment. Workday distributes any step groups without condition rules to all journey recipients.
Configuration Description	Details you enter here are only visible to you.
Step Group Display Name	Workday displays this name in distributed journeys. You can enter up to 500 characters, but Workday only displays the first 140 to recipients. You can repeat an existing step group name.

Option	Description
Step Group Description	Journey recipients can see this description. When you edit this description, Workday doesn't display the change in previously distributed journeys.

Journey Step Types

You can add these step types to your step groups and steps.

Option	Description
Article	You can search and add articles for your users. These must be articles stored within Workday. You can view the articles only if you have appropriate domain access to the Workday Help domain. To provide access to articles and learning content, enable the Help and Learning SKUs for your tenant.
Document	You can upload relevant documents for your users to view, download, and print on their journey steps. Workday supports these file formats: • PDF • DOC • DOCX
Extend Cards	You can search and add extend cards for your users within the journey editor once a developer deploys an Extend app containing extend cards to the tenant. This allows you to bring in data from: • Extend apps. • 3rd party applications. You have to subscribe to the Workday Extend SKU to add extend cards as a step type on journeys. Note: The Extend Cards step type is only available in the journey editor if an extend app has been deployed to your tenant.
Learning	You can search and add existing learning content for your users within Workday. You can view the learning content only if you have appropriate domain access to the Workday Learning domain.
Link	You can configure all internal and external links in the journeys editor and maintain them in the Maintain Journey External Links task.
Task	You have access to any Workday-delivered tasks and open them in: • A new tab. • The journey context.
To Do	Enter plain text instructions for your users.

Option	Description
Video	Display an embedded video that your users can watch. To create a video directly from the journey editor, you can add a video step, then click Create Journey Video to upload a video from your computer or drive.

Due Dates on a Journey Step

You can add event-based and calendar-based due dates on Journey steps.

Option	Description
Event Date	Event Date based due dates are due in relation to an event, such as Journey Received Date/Time. You can configure a due date in relation to an event. You can configure a due date before or after an event takes place. Example: You select the Journey Received Date/Time event. You configure the due date 1 week after the event. When a worker receives the step on 2022-10-07, the due date is 2022-10-14. The Journey Received Date/Time event is the only event based due date available for student journeys.
Calendar Date	Calendar Due Dates configured by a Workday administrator aren't specific to the time zone in which the due date is set, but it's the absolute date for every recipient. Example: You select 2023-01-01 as the calendar due date. The due date for your users is 2023-01-01.

To familiarize yourself with how due dates work, refer to:

Option	Description
Time Zones	Workday Journeys uses the recipient's preferred time zone to calculate due dates. This applies for Preview, Proxy, and calculations at distribution.
Due Date Calculation	Calendar Due Dates that's configured by a Workday administrator aren't specific to the time zone in which the due date is set, but rather are the absolute date for every recipient. Example: If 12/5/2022 is selected as a due date: • The step is due on 12/5/2022 GMT *-07:00* for a user in GMT *-07:00* • The step is due on 12/5/2022 GMT *+09:00* for a user in GMT *+9:00*

Related Information

Tasks

Create Business Process Condition Rules on page 1011

Mass Distribute Documents or Tasks on page 383

Set Up Mass Operations on page 1037

Reference

2021R2 What's New Post: Journeys Workspace

2023R1 What's New Post: Journeys Templates

2022R2 What's New Post: Due Dates for the Journeys Editor

2023R2: What's New Post: Journeys Condition Rules at the Step Level

2023R2 What's New Post: Journeys for Students

https://community.workday.com/node/1173410

2024R1 What's New Post: Document Upload on Journey Steps

2024R1 What's New Post: Workday Tasks in Journeys Experience

2024R1 What's New Post: Distribute Multiple Journeys in a Journey Category

2024R1 What's New Post: Create Links in the Journeys Editor

2024R1 What's New Post: Journeys Category User Experience

2024R2 Feature Release Note: Distribute Multiple Journeys in a Journey Category

2024R2 Feature Release Note: Enhancements to Journey Category Type User Experience

The Next Level: Workday Student: Journeys Configuration and Use Cases

2025R1 Feature Release Note: Journeys Category User Experience

2025R2 Feature Release Note Extend Cards As A Step Type in Journeys

2025R2 Feature Release Note: Self Service Journeys User Experience

2025R2 Feature Release Note: Journeys Distribution REST API

2025R2 Feature Release Note: Auto Populate Journey Distribution Information

Concept: Journeys Templates

Journeys Templates

You can navigate to the Workday-delivered Journeys Templates through the Journeys Workspace report.

Security: *Set Up: Journey Administration* domain in the Journeys functional area.

To access Journeys Templates, you can:

- Select the journeys template tab on the left-side navigation panel.
- Select the Resources icon on the top-right corner of the report.

The Workday-delivered templates provide you with an easy starting point when you configure new journey use cases through both these methods.

Click Create Journey to start the journey configuration process. When you click Create Journey, Workday displays a pop-up modal. The modal displays:

- Explore Templates to browse through the Workday-delivered templates.

  You can view Workday-delivered templates by selecting either Template Details or select Preview or Use Template from the Related Actions menu.
- Build your Journey by starting from scratch on the journey builder.

We provide you with Workday-delivered templates to ease your configuration process and provide insights into frequently used journey use cases.

Section	Description
Commitment to Belonging and Diversity	Guides you to create a Diversity, Equity, Inclusion, and Belonging (DEIB) experience for your employees.
First-time Manager	Guides new managers to succeed in their initial weeks in the organization.
Fueling Your Career	Guides your employee to build skills, enroll in learning courses, and provide mentorship and networking opportunities for them.
Job Transition	Ensures employees to have the resources, knowledge, and support for a seamless experience.
Offboarding	Allows a smooth offboarding process for your employee.
Onboarding	Allows a smooth onboarding process to match your employee's specific needs.
Open Enrollment	Streamlines open enrollment period for your employee.
Relocation	Allows you to tailor a smooth experience that best fits your employee.
Supporting Your Parental Leave	Provides you with specific policies and procedures to make your employee feel supported.
Supporting Your Sick Leave	Ensures a hassle free process for both the employee and the HR team that supports the employee.

You can use Copy Link to share a view only URL of a page with anyone outside of the Journeys. You can select Preview to see how the journey displays for your user and click Use Template to create a journey.

Security: *Manage Journey Builders* domain in the Journeys functional area.

Custom Templates

You can navigate to the Custom Templates through the Journeys Workspace report.

You must have edit access to *Manage Journey Builders* domain to create, edit, and publish custom templates.

Note: You can enable custom templates only for *Recipient Type- Worker*.

To optimize this feature, you can:

- Select Create Journey Templates to create new templates from scratch or browse existing journeys and copy as a template.
- Select Browse Journeys and click the Copy as Template action button to copy an existing journey use case to use as a template.
- Select Create Template From Builder to create a builder from a custom template.
- Manage the templates with options to draft, edit, and publish.

Related Information
Reference
2023R1 What's New Post Journeys Templates

The Next Level: Leverage the Power of Workday Journeys for Workers Webinar Series
2024R1 Release Note Feature: Improved Searchability for Journeys Templates
2024R1 Release Note Feature: Journeys Offboarding Template
2024R2 Release Note Feature: Journeys Fueling Your Career, Job Transition, and Relocation Templates
2025R1 Release Note Feature: Journeys Leave of Absence Templates
2025R1 Release Note Feature: Custom Templates in Journeys Workspace

Steps: Set Up and Manage Journeys Category Types

Prerequisites

Security: *Set Up: Journey Administration* in the Journeys functional area.

Journey category type is an attribute on the journey category. You can assign and classify categories from the Workday-delivered category types on the journeys workspace report.

You can access the Journeys Workspace report (secured to the *Set Up: Journey Administration* domain) through global search.

Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

Steps

1. Click the Create Journey Category prompt to create a new journey category.
2. Add a Journey Category Name to the workflow.
3. Select 1 type of category from the journey Category Type drop-down menu. You can't multi-select category types in a journey.
4. Click the Category Types Explained tooltip that enables you to review and evaluate specific Workday-delivered category types based on the recipient type such as worker or student.
5. Click Create.

   When you click the Settings tab on the journeys editor, Workday displays the Journey Category Details, Functional Area, and Journey Category Type fields. You can reassign a category to a different category type but you can't edit or rename the Workday-delivered category types.

   You can also update the existing categories that display as Unassigned in the:

   - Settings tab in the journey editor.
   - Edit Journey Category task.
6. Access the category types modal on the journeys workspace report.
7. Click the arrow Next to view the Category Name and Category Type display grid.
8. Click the Manage Category Types button to access the Maintain Journeys Category Types task.
9. Click the hamburger icon for an unassigned category to display the category types delivered by Workday.
10. Select the category type that maps to the existing category and click OK.

Result

This workflow enables you to associate all unassigned categories to a category type delivered by Workday.

Related Information
Reference
2024R2 Feature Release Note: Enhancements to Journey Category Type User Experience
The Next Level: Leverage the Power of Workday Journeys for Workers Webinar Series

Reference: Journeys Workspace Keyboard Shortcuts

You can use keyboard shortcuts to navigate the Journeys Workspace.

Keyboard Command	Description
Home (Windows) Fn+Left Arrow (Mac)	Highlights from the current step to the related actions button on the first step in the list. Required and recommended steps are 2 separate lists.
End (Windows) Fn+Right Arrow (Mac)	Highlights from the current step to the related actions button on the last step in the list. Required and recommended steps are 2 separate lists.
Delete (Windows) Fn+Delete (Mac)	Deletes the current step.
Alt+Shift+C (Windows) Option+Shift+C (Mac)	Duplicates the current step and highlights the related actions button.
Alt+Shift+E (Windows) Option+Shift+E (Mac)	Opens the right-hand Edit panel for the current step.
Ctrl+Home (Windows) Ctrl+Fn+Left Arrow (Mac)	Moves the current, highlighted step to the first step in the list hierarchy and highlights the related actions button.
Ctrl+End (Windows) Ctrl+Fn+Right Arrow (Mac)	Moves the current, highlighted step to the last step in the list hierarchy and highlights the related actions button.
Alt+4 (Windows) Option+4 (Mac)	Highlights the Distribute button.
Alt+5 (Windows) Option+5 (Mac)	Highlights the first item in the Add Steps and Step Group section.
Alt+6 (Windows) Option+6 (Mac)	Highlights the top banner.
Alt+7 (Windows) Option+7 (Mac)	Highlights the first field in the right-hand Edit panel.

Related Information
Reference
2021R2 What's New Post: Journeys Workspace
The Next Level: Leverage the Power of Workday Journeys for Workers Webinar Series

Example: Configure Due Dates for Open Enrollment

The Workday administrator configures due dates based on an Event Date or a Calendar Date. Due dates help set expectations for your users so they can prioritize and complete time critical components of a journey.

Context

This example illustrates how to configure due dates differently based on 2 types of configurations.

Prerequisites

Security: You must have *Set Up: Journey Administration* in the Journeys functional area.

Betty wants to prepare for Open Enrollment and ensure she does it on time.

As an administrator, you can set a due date for 2 weeks after a journey distribution event to give Betty 2 weeks to learn about their enrollment options. For Betty, updates to Open Enrollment is from November 1st to November 15th of the year.

You must specify November 15th as the enrollment due date so that Betty doesn't miss the deadline to enroll in benefits.

Steps

1. Access the Journeys Workspace report to create a new journey.
2. Access the Journeys Editor in the Journeys Workspace report.
3. Create a new Step Group for Open Enrollment preparation and configure steps related to this event.
4. To prepare, click the Steps 1 at a time to open up the edit panel.
5. Select Add Date from the Due Dates prompt in the Edit panel for the individual journey step.

   This opens up a pop-up displaying the 2 types of due dates, such as Event Date and Calendar Date.
6. Select Event Date from the pop-up and configure the Event field to: *Journey Received Date/Time* and the Due in Relation to Event to *Due 2 weeks after*.
7. Create a new Step Group for Open Enrollment selection, and configure the steps required for enrollment.

   For the Open Enrollment selection, follow step 4 through step 6, and this time you select Calendar Date from the pop-up and specify the date as November 15th.
8. Click Calendar Date from the header of the pop-up and select November 15th.
9. Select Check For Errors and set the journey for distribution on October 17th using the distribution methods documented in the Setup Considerations: Journeys on page 1265 topic.

Result

Betty can see the Open Enrollment journey in the Awaiting Your Actions section on the home page with the next step due on October 31st when they access their home page on October 17th.

When Betty clicks the journey, they're:

- Guided through the Open Enrollment preparation steps due on October 31st.
- Once they navigate to the Open Enrollment selection steps, they're able to see the due date of November 15th.

Related Information

Reference

The Next Level: Leverage the Power of Workday Journeys for Workers Webinar Series

Example: Create and Distribute a Journey

This example illustrates how you can use a journey to help a new manager onboard into their role.

Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

Context

Betty Brown is an employee at your company who has recently been made a manager. You want to create a journey that provides her with a consolidated list of the first tasks she needs to do in her new role.

Prerequisites

Security: *Manage: Journey Builders* domain in the Journeys functional area.

Steps

1. Access the Journeys Workspace report.
2. Click Create Journey, and then click Build Your Journey.
3. Enter these values and click Create:

Option	Description
Journey Name	*New Manager Tasks*
Recipient Type	*Worker*
Journey Category	*Create Journey Category*
Journey Category Name	*First-Time Manager*
Journey Category Type	*Job Transition*

4. In the journey editor, click the journey header.
5. In the Edit Journey Details section, enter *Welcome New Manager* in the Journey Name field.
6. From the left column, drag a step group into the journey.
7. In the Edit Step Group section, enter *New Manager Tasks* in the Step Group Name field.
8. From the left column, drag 2 task steps into the Required Steps section of the step group.
9. Click the first task in the Required Steps section.
10. In the Edit Task Step section, select *Change My Business Title* on the Task prompt.
11. Click the second task in the Required Steps section.
12. In the Edit Task Step section, select *Create Goal* on the Task prompt.
13. From the left column, drag a task step into the Recommended Steps section of the step group.
14. In the Edit Task Step section, select *Org Chart* on the Task prompt.
15. Click Check for Errors.
16. Click Distribute and enter these values:

Option	Description
Journey Category	*First-Time Manager*
Journey Builder	*New Manager Tasks*
Recipients	*Betty Brown*

17. Click OK.

Result

Workday displays the journey in the Awaiting Your Action section on Betty's home page.

Related Information

Reference

The Next Level: Leverage the Power of Workday Journeys for Workers Webinar Series

Example: Create Security Segments on Journey Categories

You can create security segments and assign security permissions to journey categories for an individual or a group.

Context

This example illustrates how you can use security segments to control journeys categories to suit the needs of your organization. We'll create segments to:

- Restrict users from accessing a specific journey category.
- Grant access to certain individuals or groups to configure, distribute, or report on Journeys.

Prerequisites

These domains in the Journeys functional area:

Domain	Permissions	Actions
Manage: Journey Builders	• Segment- Journey Category • Unconstrained Groups	Users with *Modify Permissions*: • Create a journey • Modify a journey • View a journey Users with *View Permissions:* • View • Preview • Run reports and access journey metrics. If a user has *Modify Permissions* for this domain and has been granted permissions for Who Can Start the Business Process, they can configure journey distribution to distribute journeys. Note: When you add segment-based security groups to this domain, users can only configure categories they have access to, for distributing journeys.
Set Up: Journey Administration	Unconstrained Groups	Users can create and modify a journey category.

Steps

1. To configure segment-based security, enter your Workday tenant.
2. Access the Domain Security Policies for Functional Area and enter *Journeys* in the Functional Area tab.

   The security domains for the Journeys functional area are listed on the left-hand side.
3. (Optional) Remove users from the *Set Up: Journey Administration* if you want to restrict their access to create, edit, and view journey category functionalities.

4. Create Segment-Based Security Groups.

   As you complete the task, consider:

Field	Description
Type of Tenanted Security Group	Select *Segment-Based Security Group*.
Name	Enter a name of the group that you want to segment out. *Onboarding Journeys*
Security Groups	Select the security group that you want to have access to the journey categories you're segmenting out. *Onboarding Administrator*

5. To configure distribute permissions, navigate to the Edit Business Process Security Policy task, and click *Journey Distribution* from the Business Process Type prompt.

   You can create a *Distribute Journeys* security group that enables HR partners to distribute journeys but doesn't grant permissions to the Onboarding Administrator group to distribute journeys.

   You must have permission to start the Business Process > Journey Distribution Business Process.
6. Activate Pending Security Policy Changes after completing the configuration process.

Result

The security groups enable the HR partner and Onboarding Administrator to access information based on their segment-based permissions.

- Logan, HR partner, has unconstrained access. When they navigate to the Journeys Workspace, they're able to:
  - See all the individuals with configured journeys in the tenant.
  - View, edit, and distribute any journey category.
  - Create new journey categories.

    You must have access to the *Set Up: Journey Administration* domain in the journey functional area.
- Daniel, HR partner, is responsible for all the relocations in their organization and therefore has access only to *Modify* and *Distribute* access to specific journey categories such as relocation journeys. When they navigate to the Journeys Workspace, they:
  - Can view and edit the *Open Enrollment Journeys* and *Onboarding Journeys*.
  - Can't view or edit the *Transition to Managers Journeys*.
  - Can create a report on specific categories limited to enrollment and onboarding.
- James Walker, Onboarding Administrator, can view, preview, look at metrics, edit, and distribute these categories in these tenants.
  - *Onboarding - Product Management*
  - *Onboarding - Sales*
  - *Onboarding - Software Engineering*

Related Information

Reference

2023R1 What's New Post: Journeys Segmented Security on Category

Accessibility

Concept: Accessibility

Workday Accessibility optimizes tasks for users on assistive technology, referencing standards set by:

- The W3C Web Content Accessibility Guidelines (WCAG) 2.2.
- Section 508 of the US Rehabilitation Act.
- ETSI (European Telecommunications Standards Institute) EN 301 549.

Workday accessibility features enable you and your users on assistive technology to:

- Use compatible assistive technology like a screen reader for text-to-speech output.
- Use keyboard support to navigate through Workday without a mouse.
- View Workday with high color and contrast, improving legibility for all users.

Accessibility in Workday is available to all users upon signing in to Workday and requires no additional configuration in Edit Tenant Setup tasks.

Note:

To support screen reader users, disable the quick tips that display when users:

- Initially sign in to Workday.
- View calibration nBox reports.

To disable quick tips, access the Edit Tenant Setup - System task, and select these check boxes:

- Disable Calibration Quicktips.
- Disable Welcome Quicktips.

You can familiarize yourself with accessibility in the Workday user interface, by accessing the Accessibility Interaction Overview task. To view this task:

- Search for *Accessibility Interaction Overview*.
- Use the tab key to keyboard navigate to the *Accessibility Interaction Overview*. This section comes after the Skip to Main link on every page in Workday.

Additional Accessibility Implementation and Configuration Recommendations

- To enable blue buttons in any tenant, access the Edit Tenant Setup - System task and select Enable Blue Primary Buttons. Then, sign out and sign back in to Workday to apply the color change.
- Access the Edit Tenant Setup - Recruiting task and enable the Enable New Search for Jobs UI check box. Your environment must have the Calypso service enabled.

Mobile

Workday mobile apps support the built-in text-to-speech software of your device for a limited number of self-service tasks on:

- Android
- iPad
- iPhone

Statement of Accessibility

The *Accessibility in Workday Applications* documents are available in the Workday Customer Center Content Library. These documents use the industry-standard ITI VPAT format. The list of available documents is located at Accessibility Documentation.

To obtain a copy of the document, have a Named Support Contact from your organization, access the Workday Customer Center. Then, click the Content tab to access the file.

Related Information

Reference

Reference: Workday Sign In URLs

Accessibility Roadmap

The Next Level: Product Accessibility at Workday

Guidance Workspace

Steps: Configure QuickTips using Guidance Workspace

Prerequisites

Security:

- Enable the User Success Platform functional area. See Steps: Enable Functional Areas and Security Policies.
- Security:
  - The security domains for each Workday task you're configuring .
  - *Security Activation* domain in the System functional area.
  - *Set Up: Guidance Workspace* domain in the User Success Platform functional area.

Context

You can configure QuickTips directly in a Production or in a Sandbox tenant. If you use a sandbox, we recommend that you migrate the QuickTips to production with Object Transporter after publishing.

You can configure your QuickTips in Guidance Workspace, including:

- Writing your own support text in QuickTips and publishing it on the Workday user interface.
- Converting content from Guided Tours to Guidance Workspace QuickTips.
- Monitoring QuickTips usage across your tenant.

You can download the latest Guidance Workspace Supported Tasks file from the Workday Community. See: From Confusion to Clarity: Embrace the Guidance Workspace and Help Text.

You can enable users to create or edit QuickTips by either:

- Assigning the user to the necessary security groups.
- Granting proxy access to let the user create guidance for tasks that they can't normally access.

Steps

1. Access the Guidance Workspace report.

   The Guidance section provides an overview of your tenant's Workday tasks, their guidance status (draft, published, or archived), intended audience, and who last modified the task and when.
2. Select Discover Tasks to search for tasks on which to add or edit QuickTips.
3. Create a new project.

   You can use projects to group guidance content. You can only work on 1 project at a time.

   Example: Create a project to bundle all of the guidance for the Change Job business process.
4. Select Create a QuickTip within the project to begin creating guidance for the selected task. You can create QuickTips for any editable field, add or edit rich text content, add links, and attach documents or other media.

5. You can select Preview at any time to review your work.

   After first creating your QuickTips in English, you can select other languages.
6. When you're ready to deploy QuickTips, select Save and Publish.
7. Complete the project.

   After you're done adding guidance for the project, use the related actions menu to exit.
8. (Optional) Delete a Project and All Its QuickTips.

Result

- After publishing, your QuickTips are live in Workday for any user who has access to the configured tasks.
- After deleting, Workday permanently removes the project and all its associated QuickTips from the Guidance Workspace.

Related Information

Reference

Reference: Sample QuickTips for the Add Program of Study on page 1297
Reference: Sample QuickTips for Change Benefits on page 1301
Reference: Sample QuickTips for Create Course on page 1309
Reference: Sample QuickTips for Create Job Requisition on page 1319
Reference: Sample QuickTips for Create Position on page 1326
Reference: Sample QuickTips for Edit Service Dates on page 1329
Reference: Sample QuickTips for Get Feedback on Self on page 1332
Reference: Sample QuickTips for Give Feedback on page 1333

Delete Guidance Project and All its Quick Tips

Prerequisites

Security:

- *Security Activation* domain in the System functional area.
- *Set Up: Guidance Workspace* domain in the User Success Platform functional area.

Context

You can delete a guidance project when it’s no longer needed, such as after retiring or replacing the QuickTips it contains.

Deleting a project permanently removes all its QuickTips, including draft and published QuickTips.

Steps

1. Access the Guidance Workspace report.
2. Navigate to the Discover Task.

   Select any task from the list.
3. On the Left side panel of Create Guidance Project, Select the project to continue adding Guidance.

   Note: You can’t delete a project without a task associated with it. You must first add a task to the project, then delete it.
4. Click Continue.
5. From the project preview, select the More Actions button.
6. Select Delete Project.

7. In the confirmation window, select Delete Project again.

   Note: This action is permanent and cannot be undone.

Result

Workday permanently removes the project and all its associated QuickTips from the Guidance Workspace. Deleted QuickTips are no longer available to users in the Workday interface.

Concept: Guidance Workspace

Guidance Workspace is a tool that enables you to create custom user interface content, called QuickTips, to provide guidance for your employees.

You can use Guidance Workspace to:

- Configure your own support text for the Workday tasks you use the most.
- Reduce the time it takes for your employees to complete tasks and find information in Workday.
- Provide guidance directly on the task to reduce errors.

Guidance Workspace also enables you to:

- Configure QuickTips in multiple languages, which display in the Language drop-down section.
- Convert your existing Workday Guided Tours to QuickTips.

To configure guidance on Workday tasks, you must have access to:

- The *Set up Guidance Workspace* domain in the User Success Platform functional area.
- Any security domains that secure the Workday task for which you're configuring QuickTips. You must log out and back in to enable the changes to the security domain.

Related Information
Examples
From Confusion to Clarity: Embrace the Guidance Workspace and Help Text

FAQ: Guidance Workspace

Do I need Innovation Services to use the Guidance Workspace?	No, the Guidance Workspace and QuickTips don't require Innovation Services.
Can I migrate my existing Guided Tours content To Guidance Workspace?	Yes. You can access the Convert Guided Tours task to manually migrate your Guided Tours content to QuickTips, including translations. Workday will automatically migrate your existing Guided Tours content, including translations, to QuickTips when we retire Guided Tours.
Who can create or update guidance? Can it be configured for individual access?	Administrators can configure guidance for the tasks they have access to. Example: If an administrator has access to the Change Job process, they have access to update the guidance for Change Job.
What languages does Workday support for my guidance?	Workday translates any guidance you create to any Workday-supported language. However, you can't upload your own translations.
What kind of links can I use in my guidance?	You can have links in any form, including Quick Links and links to Workday tasks.

Which tasks can I add QuickTips to?	For a complete list of supported tasks, see Workday Community: Tasks Supported for use with QuickTips and Convertable from Guided Tours
Can I disable machine learning "Suggested for you" content in QuickTips?	Machine learning suggestions appear in QuickTips as part of the overall Guidance Workspace offering. Currently, you can't disable machine learning suggestions on a per-QuickTip level or across all QuickTips.
Where do machine learning suggestions in QuickTips come from?	Machine learning suggestions appear on all tasks that include a prompt and that have suggestions available as surfaced by Workday's machine learning model. Workday uses this logic for machine learning suggestions: • A user clicks a QuickTip beside a prompt. • The prompt contains a URI to fetch suggestions from machine learning. • When no suggestions are returned, we create a model and machine learning starts training one. • When suggestions are returned, we present them inside a QuickTip.

QuickTips Sample Library

Concept: QuickTips Sample Library

Welcome to the QuickTips Sample Library! Here you'll find text samples that you can use as a starting point as you add QuickTips to some frequently used tasks in the Guidance Workspace report. In the QuickTips Sample Library, we provide suggestions for:

- QuickTip titles.
- QuickTip descriptions.
- Additional considerations while drafting your QuickTips.

Note: The sample information we provide might not apply to your business needs or tenant configuration. Modify and review all information according to your tenant requirements before publishing this guidance to your tenant.

Reference: Sample QuickTips for the Add Program of Study

You can use these sample QuickTips as a starting point when adding your own QuickTips to the Add Program of Study Event business process using the Guidance Workspace report.

Note: The sample information we provide might not apply to your business needs or tenant configuration. Modify and review all information according to your tenant requirements before publishing this guidance to your tenant.

Add Advisory Program

Field	QuickTip Title	QuickTip Description	Considerations
Current Programs of Study	Current Programs of Study	This view displays the current programs of study along with the key academic	

Field	QuickTip Title	QuickTip Description	Considerations
		details such as Academic Calendar, the Academic Unit owing the program, Academic Level, Educational Credential, the Declare Date (when the academic requirements become effective), and the Expected completion Date.	
Add Programs Of Study	Add Programs Of Study	Select a new program you wish to pursue. The newly selected program's academic informationm will automatically populate. Select the Expected Completion Date for this program. You can add more than one program of study.	
Declare Date	Declare Date	Choose the date when the academic requirements for this program will become effective.	
Comments	Comments	Enter any relevant comments regarding the programs of study.	

Add Advisory Program for Student

Field	QuickTip Title	QuickTip Description	Considerations
Academic Record	Academic Record	Select a student for whom you're adding an advisory program.	
Current Programs of Study	Current Programs of Study	This view displays the current programs of study assigned to the selected student along with the key academic details such as Academic Calendar, the Academic Unit owing the program, Academic Level, Educational Credential,	

Field	QuickTip Title	QuickTip Description	Considerations
		the Declare Date (when the academic requirements become effective), and the Expected completion Date.	
Add Programs Of Study	Add Programs Of Study	Select a new program you wish to pursue. The academic information for the newly selected program will automatically populate. Select the Expected Completion Date for this program.	
Declare Date	Declare Date	Choose the date when the academic requirements for this program will become effective.	
Comments	Comments	Enter any relevant comments regarding the newly added program.	

Add Program of Study

Field	QuickTip Title	QuickTip Description	Considerations
Current Programs of Study	Current Programs of Study	This view displays the current programs of study along with the key academic details such as Academic Calendar, the Academic Unit owing the program, Academic Level, Educational Credential, the Declare Date (when the academic requirements become effective), and the Expected completion Date. The Is Primary field indicates the primary subject among the listed programs.	

Field	QuickTip Title	QuickTip Description	Considerations
Add Programs Of Study	Add Programs Of Study	Select a new program you wish to pursue. The academic information for the newly selected program will automatically populate. Select the Expected Completion Date for this program. You can add more than one program of study	
Declare Date	Declare Date	Choose the date when the academic requirements for this program will become effective.	
Comments	Comments	Enter any relevant comments regarding the programs of study.	

Add Program of Study for Student

Field	QuickTip Title	QuickTip Description	Considerations
Academic Record	Academic Record	Select a student for whom you're adding a program of study.	
Current Programs of Study	Current Programs of Study	This view displays the current programs of study assigned to the selected student along with the key academic details such as Academic Calendar, the Academic Unit owing the program, Academic Level, Educational Credential, the Declare Date (when the academic requirements become effective), and the Expected completion Date. The Is Primary field indicates the primary subject among the listed programs.	

Field	QuickTip Title	QuickTip Description	Considerations
Add Programs Of Study	Add Programs Of Study	Select new programs of study. Select the Is Primary checkbox, if the program of study is a primary program of study. When the selected program of study isn't standalone, Workday disables the Is Primary check box. The academic information for the selected program will automatically populate. Select the Expected Completion Date for this program. You can add more than one program of study.	
Declare Date	Declare Date	Choose the date when the academic requirements for this program will become effective.	
Comments	Comments	Enter any relevant comments regarding the programs of study.	

Related Information

Tasks

Manage Programs of Study for Students

Steps: Set Up and Manage the Guidance Workspace on page 1294

Reference: Sample QuickTips for Change Benefits

You can use these sample QuickTips as a starting point when adding your own QuickTips to the Change Benefits task.

Note: The sample information we provide might not apply to your business needs or tenant configuration. Modify and review all information according to your tenant requirements before publishing this guidance to your tenant.

Change Benefits

Field	QuickTip Title	QuickTip Description	Considerations
Change Reason	Change Reason	Select a reason for changing your benefits. Example: *Beneficiary Change.*	

Field	QuickTip Title	QuickTip Description	Considerations
Benefit Event Date	Benefit Event Date	Select the date on which the event occured. Example: The date on which to add 1 or more dependents because of a birth or a marriage.	
Attachments	Evidence of Insurability Attachment	Click Select Files and attach the required documents to show evidence that the benefit changes are valid. Example: birth certificate, marriage certificate, death certificate...	

Revise Benefit Changes

Field	QuickTip Title	QuickTip Description	Considerations
Change Reason	Change Reason	Select a reason for changing your benefits. Example: Beneficiary Change.	
Benefit Event Date	Benefit Event Date	Select the date on which the event occured. Example: The date on which to add 1 or more dependents because of a birth or a marriage.	
Attachments	Evidence of Status Change Attachments	Click Select files and attach the required documents to show evidence that the benefit changes are valid. Example: birth certificate, marriage certificate, or death certificate.	

Health Information

Field	QuickTip Title	QuickTip Description	Considerations
Health Information Section: Have You used tobacco in any form in the past 12 months?	Have you used tobacco?	Select the correct answer.	

Plan Selection

Field	QuickTip Title	QuickTip Description	Considerations
Plans Available	Plans Available	Select or waive benefit plans that can be updated. Available plans depend on the reason for changing your benefits.	The language in this field applies to any benefit plan and needs to work for health care, insurance, and for additional benefit plans.
Coverage	Coverage	Enter or select the type or amount of coverage that you want. This might be an amount, a percent, or selection from a list.	
Per Paycheck	Contribution Per Paycheck	Enter the amount you want want to contribute for each pay period.	
Annual	Annual Contribution	Enter the amount you want to contribute for the benefit year.	
Primary Beneficiaries	Primary Beneficiaries	Select existing beneficiaries and add any new ones that you wish to include. Enter the percentage of the benefit that each should receive, totaling 100 percent.	
Secondary Beneficiaries	Secondary Beneficiaries	Select existing beneficiaries and add any new ones that you wish to include if the primary beneficiaries are ineligible to receive the benefit. Enter the percentage of the benefit that each should receive, totaling 100 percent.	
Contribution Type	Contribution Type	Typically an amount or percentage.	
Employee Contribution	Employee Contribution	The amount or percentage of your salary that you wish to contribute toward the benefit, per paycheck.	

Retirement Savings by Coverage Type/Allocate Retirement Savings Across Multiple Providers

Field	QuickTip Title	QuickTip Description	Considerations
Contribution Type	Contribution Type	Select *Amount* or *Percentage* for your contribution.	

Field	QuickTip Title	QuickTip Description	Considerations
Employee Contribution	Employee Contribution	Enter the amount you're contributing to 1 or more plans. Must equal 100 percent, or the designated monetary amount.	
Employer Contribution	Employer Contribution	Enter the amount or percentage of the employee' salary the organization will contribute to each benefit plan.	

Save For Later Confirmation

Field	QuickTip Title	QuickTip Description	Considerations
Elected Coverages	Elected Coverages	A summary of the benefits you have selected and their coverages, including dependents, beneficiaries, amounts or rates of coverage.	
Waived Coverages	Waived Coverages	The benefits that you have not selected for each coverage type.	
Beneficiary Designations	Beneficiary Designations	Summarizes the dependents or other designees that receive your benefits after your death.	
Current Benefit Credits	Current Benefit Credits	A summary of credits that you are eligible for, which might defray the cost of benefits.	

Review and Submit/View Summary

Field	QuickTip Title	QuickTip Description	Considerations
Selected Benefits	Selected Benefits	The benefits that you have selected for each coverage type.	

Field	QuickTip Title	QuickTip Description	Considerations
Waived Benefits	Waived Benefits	The benefits that you have not selected for each coverage type.	
Credits	Total Benefit Credits	Total Credits that Workday uses to offset your benefit costs.	
Total Benefit Cost	Total Benefit Costs	The amount you pay for coverage in the benefit period.	
Comment	Comment	Notes for reminders or documentation.	
I Accept	I Accept	The required check box that says you acknowledge the terms for these benefits and that you are the employee for these benefits.	

<Year> Benefits Statement

Field	QuickTip Title	QuickTip Description	Considerations
Beneficiary Designations	Beneficiary Designations	The people that you have selected to receive your benefits if you pass away. (rewrite)	
Elected Benefits	Elected Benefits	The benefits elections that you selected for the current year.	
Waived Benefits	Waived Benefits	The benefits elections that you waived for the current year.	
Benefit Credit Summary	Benefit Credit Summary	The credits that you received to offset your benefit costs.	
Total Benefit Cost	Total Benefit Cost	Summarizes the employer contribution and worker cost for benefits, along with any credits used to offset your costs.	

Change My Marital Status

Field	QuickTip Title	QuickTip Description	Considerations
New Marital Status	New Marital Status	Select the correct status that matches you marital situation.	

Related Information

Tasks

Change Benefit Elections

Steps: Set Up and Manage the Guidance Workspace on page 1294

Reference: Sample QuickTips for the Change Job Business Process

You can use these sample QuickTips as a starting point when adding your own QuickTips to some of the tasks in the Change Job business process using the Guidance Workspace report.

Note: The sample information we provide might not apply to your business needs or tenant configuration. Modify and review all information according to your tenant requirements before publishing this guidance to your tenant.

Start Job Change

Field	QuickTip Title	QuickTip Description	Considerations
Worker	Worker	Select a worker who you want to perform a change job action on.	
What do you want to do?	What do you want to do?	Select an action to perform for the worker.	

Review Change Job

Field	QuickTip Title	QuickTip Description	Considerations
When do you want this change to take effect?	When do you want this change to take effect?	Specify the date you want the change job action to take effect on.	
Why are you making this change?	Why are you making this change?	Specify the reason for the change job action.	
Job Profile	Job Profile	Specify the job profile of the worker you're performing the change job action on.	
Job Title	Job Title	Specify the job title of the worker you're performing the change job action on.	
Business Title	Business Title	Specify the business title of the worker you're performing the change job action on.	

Field	QuickTip Title	QuickTip Description	Considerations
Work Space	Work Space	Specify the work space of the worker you're performing the change job action on.	
Scheduled Weekly Hours	Scheduled Weekly Hours	Specify the scheduled weekly hours of the worker you're performing the change job action on.	
Work Shift	Work Shift	Specify the work shift of the worker you're performing the change job action on.	
Additional Job Classifications	Additional Job Classifications	You can specify additional job classifications for the worker you're performing the change job action on.	
Pay Rate Type	Pay Rate Type	Specify the pay rate type of the worker you're performing the change job action on. Examples: *Daily*, *Hourly*, *Salaried*.	
Default Weekly Hours	Default Weekly Hours	Specify the default weekly hours of the worker you're performing the change job action on.	
Workers' Compensation Code Override	Workers' Compensation Code Override	You can specify an overriding workers' compensation code for the worker you're performing the change job action on.	
Assignment Type	Assignment Type	Specify an assignment type for the worker you're performing the change job action on.	
First Day of Work	First Day of Work	Specify the first day of work of the worker you're performing the change job action on.	
Notify By	Notify By	Specify the date by which you want to notify the worker of the change job action.	

Field	QuickTip Title	QuickTip Description	Considerations
Company	Company	Specify the company of the worker you're performing the change job action on.	
Cost Center	Cost Center	Specify the cost center of the worker you're performing the change job action on.	
Region	Region	Specify the region of the worker you're performing the change job action on.	
Compensation Package	Compensation Package	Specify the compensation package of the worker you're performing the change job action on.	
Grade	Grade	Specify the grade of the worker you're performing the change job action on.	
Grade Profile	Grade Profile	Specify the grade profile of the worker you're performing the change job action on.	

Add Probation Period

Field	QuickTip Title	QuickTip Description	Considerations
Worker	Worker	Select the worker for whom you want to add a probation period.	
Type	Type	Specify the type of probation you're adding for the worker.	
Reason	Reason	Specify the reason you're adding the probation period for the worker.	
Probation Start Date	Probation Start Date	Specify the start date of the probation period for the worker.	
Probation End Date	Probation End Date	Specify the end date of the probation period for the worker.	

Field	QuickTip Title	QuickTip Description	Considerations
Probation Duration	Probation Duration	Specify the duration of the probation period for the worker. Use the Units field to specify whether the duration is in days, weeks or months.	
Unit	Unit	Specify the units of time for the Probation Duration. You can specify days, weeks or months.	
Probation Review Date	Probation Review Date	Specify the probation review date for the worker.	

Reference: Sample QuickTips for Create Course

You can use these sample QuickTips as a starting point when adding your own QuickTips to the Create Course task for Workday Learning using the Guidance Workspace report.

Note: The sample information we provide might not apply to your business needs or tenant configuration. Modify and review all information according to your tenant requirements before publishing this guidance to your tenant.

Course Details

Field	QuickTip Title	QuickTip Description	Considerations
Create Blended Course	Create Blended Course	A blended course can contain a combination of digital content and scheduled, instructor-led lessons. You can use a blended course as a template to schedule offerings at different times and locations. Learners can select the offering they want to enroll in. You can also use a blended course to create a digital course with different versions that contain only digital content. The blended course can contain any lesson combination of external content, media, and surveys.	Do you have more specific guidelines for when users should choose a particular course type?

Field	QuickTip Title	QuickTip Description	Considerations
Create Digital Course	Create Digital Course	A digital course is a combination of digital content items that don't include scheduled, instructor-led or training activity lessons. You can include any lesson type except Instructor Led and Training Activity lessons. You don't need to schedule digital courses, so course offerings don't apply.	Do you have more specific guidelines for when users should choose a particular course type?
Skills	Skills	Select skills that are relevant to this course. You can select skills by category, or you can select *Recommended Skills* to choose from skills identified by machine learning based on the title and description of your content. If a relevant skill isn't available, you can access the Create Maintained Skills task to create it.	
Security Category	Security Category	Select a security category to restrict access to this course. Workday doesn't apply effective dating to this prompt, so changes to blended courses affect all course offerings.	Do you want to provide more explanation about the security categories you've defined?
Language	Language	Select languages to display this course when learners browse the learning catalog in those specific languages.	
Exclude from Recommendations	Exclude from Recommendations	Select to exclude the course from recommendations worklets on the	

Field	QuickTip Title	QuickTip Description	Considerations
		Learning dashboard and on these reports: • Opportunity Graph (in the Popular for This Role section) • View Competency	
Exclude from Search and Browse	Exclude from Search and Browse	Select to exclude courses from appearing in the Browse Learning Content report and global search results. Administrators, assessors, and instructors for excluded courses can still view it using global search. If you've customized the Browse Learning Content report for your company, Workday recommends that you manually update the *Exclude from Search* and *Browse* filter on pre-existing reports.	
Disable Express Interest (Blended courses only)	Disable Express Interest	Select this check box to disable the Express Interest button for learners.	
Effective Date	Effective Date	Select the date that this version of the course is active from. Select a future date to postpone availability for scheduling course offerings. Workday applies effective dating so that you can: • Report on their changes over time. • Schedule course offerings based on the course version that you're viewing.	

Field	QuickTip Title	QuickTip Description	Considerations
		A version is effective until you add a new version. When you add a new version, Workday replaces the current version. The current version expires unless its effective date is in the future. In that case, you can still edit it to plan future enhancements.	
Time Value	Time Value and Total Course Duration	When you select a Time Value, Workday displays the Total Course Duration field. Use these fields to help learners estimate how long it will take to complete all of the lessons in the course, including any instructor-led lessons and digital content. Depending on how long you think the class lasts, overestimate and round appropriately. Example: When you select *Minutes* from the Time Value prompt, round to the nearest 5 or 15 minutes when you enter the Total Course Duration.	
Enable Auto-Enrollment from the Waitlist (Blended courses only)	Enable Auto-Enrollment from the Waitlist	Select this check box to enroll learners from a waitlist automatically when space in a course offering becomes available. Ensure that you also set the Waitlist Capacity field.	
Status (Digital courses only)	Status	Select whether the course is open or closed for enrollment. When you change a course to *Closed*, learners who enrolled	

Field	QuickTip Title	QuickTip Description	Considerations
		in the course, then started or completed it, can continue to access the course from the Progress menu on the Learning dashboard.	
Requires Enrollment (Digital courses only)	Requires Enrollment	Clear this check box if learners don't need to enroll to take the course. When you clear the check box, the course is available on demand. When learners begin the on-demand course, Workday creates an enrollment record in the background to support reporting.	
Course Number	Course Number	Enter a course number to identify the course.	Do you have specific guidelines that the user should follow?
Minimum Enrollment Capacity (Blended courses only)	Minimum Enrollment Capacity	Enter the minimum number of enrollments that make the course offering viable. The default is zero. If the number of enrollments doesn't meet this value, the course offering can still go ahead as scheduled. The value is for reporting purposes only.	
Maximum Enrollment Capacity (Blended courses only)	Maximum Enrollment Capacity	Enter the maximum number of learners who can enroll in a course offering. Enter a value greater than zero to enable learners to enroll.	
Waitlist Capacity (Blended courses only)	Waitlist Capacity	Enter the number of spaces on the waitlist. Enter a number greater than zero to configure a waitlist for the course.	
Unlimited Capacity (Blended courses only)	Unlimited Capacity	Select to indicate that there's no limit to the	

Field	QuickTip Title	QuickTip Description	Considerations
		number of learners that can enroll in a course offering. Selecting this check box overrides the Maximum Enrollment Capacity value.	

Versioning

Field	QuickTip Title	QuickTip Description	Considerations
Version Schema (Blended courses only)	Version Schema	Select a version schema for the course. Version schemas enable you to version content consistently. This provides the ability to automatically label blended courses in your organization, and enables you to track and report details such as content and learner consumption.	Do you have guidelines on how to choose a version schema?
Custom Version Label (Blended courses only)	Custom Version Label	Enter a unique name for your versioned content so that learners can more easily identify which version to consume. This value acts as an override for the schema label when you've selected a version schema, if the Display Schema Label to Learners check box isn't selected.	
Version Notes (Blended courses only)	Version Notes	Enter any required notes about the course version.	

Expiration Rules

Field	QuickTip Title	QuickTip Description	Considerations
Retrain Window Value	Retrain Window Value	To specify the time period for a retrain window, enter a number in the Retrain Window Value field	

Field	QuickTip Title	QuickTip Description	Considerations
		and select a unit of time from the Weeks/Months Before Expiration prompt. The retrain window triggers retraining content to display on the Required For You slider within the defined window. The retrain window recognizes a successful completion for initial assignments and retraining assignments if a learner completes the content when the retrain window is open.	
Expiry Period	Expiry Period	Select an expiry period that applies to enrollments for this course. In the grids, you can select rules to change the default expiry period for certain groups of workers or extended enterprise learners. Workday automatically adjusts the expiry period of the course for learners who meet the rule conditions of a learner group rule. The expiration date, duration, or recurrence frequency setting is the default expiry period for learners who don't meet the conditions of any expiration rule.	
Advanced Learning Expiration Rules for Workers	Advanced Expiration Rules for Workers	Select expiration rules that define learner group rule conditions and expiry periods for workers. Access the Create Learner Group Rule	

Field	QuickTip Title	QuickTip Description	Considerations
		task to create new condition rules. Workday automatically adjusts the expiry period of the course for learners who meet the rule conditions of a learner group rule.	
Advanced Learning Expiration Rules for Extended Enterprise Learners	Rules for Extended Enterprise Learners	Select expiration rules that define learner group rule conditions and expiry periods for extended enterprise learners. Access the Create Extended Enterprise Learner Group Rule task to create new condition rules. Workday automatically adjusts the expiry period of the course for learners who meet the rule conditions of a learner group rule.	

Competencies

Field	QuickTip Title	QuickTip Description	Considerations
Competencies (grid)	Competencies	Select any competencies that relate to this course. Workday tags the course and course offering with the selected competencies.	

Cost

Field	QuickTip Title	QuickTip Description	Considerations
Price (Training Credits)	Price (Training Credits)	Enter the number of training credits that the course is worth. In the grids, you can change the default price for certain groups of workers or extended enterprise learners.	

Field	QuickTip Title	QuickTip Description	Considerations
Advanced Pricing Rules for Workers (grid)	Advanced Pricing Rules for Workers	Select rules to change the default pricing for workers that meet certain conditions. Access the Create Worker Pricing Rule task to configure rules to select in this grid.	
Advanced Pricing Rules for Extended Enterprise Learners (grid)	Pricing Rules for Ext. Enterprise Learners	Select rules to change the default pricing for extended enterprise learners that meet certain conditions. Access the Create Extended Enterprise Learner Pricing Rule task to configure rules to select in this grid.	

Lesson Details

Field	QuickTip Title	QuickTip Description	Considerations
Allowed Instructors (Blended courses only)	Allowed Instructors	Before you add lessons, select the instructors who can teach classroom training and webinar lessons in this course.	
Allowed Assessors (Blended courses only)	Allowed Assessors	Before you add training activity lessons to this course, select the assessors who can assess them.	
Location (Blended courses only)	Location	Before you add lessons, select active locations where you can schedule classroom training for offerings of this course.	

Lesson Order

Field	QuickTip Title	QuickTip Description	Considerations
Enforce Lesson Order	Enforce Lesson Order	Select to apply the order number sequence defined in the lesson order. When selected, learners can't access	

Field	QuickTip Title	QuickTip Description	Considerations
		self-directed mandatory lessons until they complete the previous required content. To enforce lesson order, you must have at least 2 mandatory lessons, with one of them being self-directed.	
Lesson Order	Lesson Order	Enter a number to specify where this lesson occurs in the course. Lessons display in sequence from 1-*n* by default. You can reorder the sequence by changing the number in this field. If you want to ensure that learners complete the required lessons in the designated sequence, select the Enforce Lesson Order check box.	
Make Lesson Mandatory	Make Lesson Mandatory	Select to indicate that the lesson is required for course completion. Clear the check box if you want to make the lesson optional. You can add both mandatory and optional lessons in a course.	
Track Attendance (In-person and virtual classroom lessons)	Track Attendance	Select if you want to record attendance for this lesson for learners who enroll in the course.	
Track Grades (In-person and virtual classroom lessons)	Track Grades	Select if you want to record grading details for this lesson for learners who enroll in the course. If you select the check box, the primary instructor or a learning administrator must	

Field	QuickTip Title	QuickTip Description	Considerations
		provide the overall course grade.	
Provide Course Grade (Media lessons)	Provide Course Grade	Select to nominate this media lesson as the one that provides the overall course grade. This check box is only available for: • Videos that contain multiple choice questions as video interactions and have a Passing Score value set. • Packaged content.	
Content URL (External content lessons)	Content URL	Enter the URL of external content or existing lessons.	
Survey (Survey lessons)	Survey	Select a survey to present to learners.	Do you have specific surveys that users should select in certain circumstances?

Related Information

Tasks

Create Learning Courses

Steps: Set Up and Manage the Guidance Workspace on page 1294

Reference: Sample QuickTips for Create Job Requisition

You can use these sample QuickTips as a starting point when adding your own QuickTips to the Create Job Requisition task using the Guidance Workspace report.

Note: The sample information we provide might not apply to your business needs or tenant configuration. Modify and review all information according to your tenant requirements before publishing this guidance to your tenant.

Start - Create Job Requisition

Field	QuickTip Title	QuickTip Description	Considerations
Copy Details from Existing Requisition	Copy Details from Existing Requisition	Select to copy an existing requisition.	
Supervisory Organization	Supervisory Organization	Specify the supervisory organisation associated with the job requisition.	
Create New Position	Create New Position	Specify whether the requisition is for a new or existing position.	

Field	QuickTip Title	QuickTip Description	Considerations
		If you want to create multiple job openings with this requisition, create a new position.	
For Existing Position	For Existing Position	Specify whether the requisition is for a new or existing position. If you want to create multiple job openings with this requisition, create a new position.	
Worker Type	Worker Type	Select the worker type associated with job requisition.	Do you want to suggest particular options? Are there options that that user should not select? Do you want to tell the user what to do if they don't know which option to select?

Recruiting Information

Field	QuickTip Title	QuickTip Description	Considerations
Number of Openings	Number of Openings	Specify the number of job openings associated with the requisition. You can add up to 500 positions.	
Reason	Reason	Specify the reason for creating the job requisition.	
Replacement For	Replacement For	Specify whether the job requisition is for an active or terminated worker. You can select an active or terminated worker if: • You have a requisition in a job management organization. • You have a new position in a position	

Field	QuickTip Title	QuickTip Description	Considerations
		management organization. If the position is or was previously occupied, Workday populates the current or preceding incumbent.	
Recruiting Instruction	Recruiting Instruction	Provide instructions for third-party recruiters. These instructions display on the Post Job task.	
Recruiting Start Date	Recruiting Start Date	Specify the recruiting start date for the job requisition. For open positions with a previous job requisition, the date must be later than the previous job requisition. For filled positions, the Recruiting Start Date must be after the fill date of the current incumbent.	
Target Hire Date	Target Hire Date	Specify the target hiring date for the job requisition. This date must be on or after the Recruiting Start Date.	
Target End Date	Target End Date	Specify the target end date for the job requisition. The employment end date applies to fixed-term employees and contingent workers.	
Referral Payment Plan	Referral Payment Plan	Select the referral payment plan associated with the job requisition. If the job profile you selected already has an associated referral payment plan, the job requisition	

Field	QuickTip Title	QuickTip Description	Considerations
		automatically uses that payment plan. You can change an automatically populated referral payment plan by selecting a different payment plan from the prompt.	

Job

Field	QuickTip Title	QuickTip Description	Considerations
Job Posting Title	Job Posting Title	Specify a title for the job posting.	
Justification	Justification	Provide a justification for the job requisition.	
Job Profile	Job Profile	Select a job profile for the job requisition.	
Job Description Summary	Job Description Summary	Provide a brief summary of the job description.	
Job Description	Job Description	Provide a description of the job for the job requisition.	
Additional Job Description	Additional Job Description	Provide additional details about the job for the job requisition.	
Worker Sub Type	Worker Sub Type	Select the worker sub type associated with the job requisition. Examples: *Fixed Term Contract*, *Seasonal*, *Trainee*.	
Time Type	Time Type	Select the time type associated with job requisition. The options include: • *Full time* • *Part time*	
Primary Location	Primary Location	Select the primary location for the job requisition.	
Primary Job Posting Location	Primary Job Posting Location	Select the primary job posting location for the job requisition.	

Field	QuickTip Title	QuickTip Description	Considerations
		You can only select a location that has *Business Site* or *Job Posting* as the location usage.	
Additional Locations	Additional Locations	Select additional locations for the job requisition.	
Additional Job Posting Locations	Additional Job Posting Locations	Select additional job posting locations for the job requisition. You can only select locations that have *Business Site* or *Job Posting* as the location usage.	
Scheduled Weekly Hours	Scheduled Weekly Hours	Weekly hours default from the scheduled weekly hours on: • The job requisition that you are copying. • The worker who is in a position, or previously filled a position if you create a job requisition on a position management organization. • The restriction on the existing unfilled position, if you create a job requisition on a Position Management Organization. • The time profile on the primary location set when you create the job requisition.	
Employee Contract Type	Employee Contract Type	Select the employee contract type and contract duration for the job requisition.	

Field	QuickTip Title	QuickTip Description	Considerations
Internal Career Site - Primary	Internal Career Site - Primary	Select a questionnaire set for the primary internal career site. Workday populates questionnaires using condition rules that you can create. Candidates complete these questionnaires when they apply to jobs on internal and external career sites. To remove or replace questionnaires, select the Enable Primary or Secondary Questionnaire Removal or Replacement on Evergreen and Job Requisitions check box on the Edit Tenant Setup - HCM task.	
Internal Career Site - Secondary	Internal Career Site - Secondary	Select a questionnaire set for the secondary internal career site. Workday populates questionnaires using condition rules that you can create. Candidates complete these questionnaires when they apply to jobs on internal and external career sites. To remove or replace questionnaires, select the Enable Primary or Secondary Questionnaire Removal or Replacement on Evergreen and Job Requisitions check box on the Edit Tenant Setup - HCM task.	
External Career Site - Primary	External Career Site - Primary	Select a questionnaire set for the primary external career site. Workday populates questionnaires using condition rules that you can create.	

Field	QuickTip Title	QuickTip Description	Considerations
		Candidates complete these questionnaires when they apply to jobs on internal and external career sites. To remove or replace questionnaires, select the Enable Primary or Secondary Questionnaire Removal or Replacement on Evergreen and Job Requisitions check box on the Edit Tenant Setup - HCM task.	
External Career Site - Secondary	External Career Site - Secondary	Select a questionnaire set for the secondary external career site. Workday populates questionnaires using condition rules that you can create. Candidates complete these questionnaires when they apply to jobs on internal and external career sites. To remove or replace questionnaires, select the Enable Primary or Secondary Questionnaire Removal or Replacement on Evergreen and Job Requisitions check box on the Edit Tenant Setup - HCM task.	

Skills

Field	QuickTip Title	QuickTip Description	Considerations
Required Skills	Required Skills	Specify the required skills for the job requisition.	
Optional Skills	Optional Skills	Specify the optional skills for the job requisition.	

Related Information

Tasks

Create and Edit Job Requisitions

Steps: Set Up and Manage the Guidance Workspace on page 1294

Reference: Sample QuickTips for Create Position

You can use these sample QuickTips as a starting point when adding your own QuickTips to the Create Position task using the Guidance Workspace report.

Note: The sample information we provide might not apply to your business needs or tenant configuration. Modify and review all information according to your tenant requirements before publishing this guidance to your tenant.

Start - Create Position

Field	QuickTip Title	QuickTip Description	Considerations
Supervisory Organization	Supervisory Organization	Select the supervisory organization in which you're opening the position.	
Position Request Reason	Position Request Reason	Specify the reason for opening the position.	
Job Posting Title	Job Posting Title	Specify the job title for the position.	
Number of Positions	Number of Positions	Specify the number of postions you want to open	

Hiring Restrictions

Field	QuickTip Title	QuickTip Description	Considerations
Availability Date	Availability Date	Enter the date when the position is available for staffing transactions. The target hire date on job requisitions can't be earlier than this date. Also, you can't change this date after you fill a position for the first time. The Availability Date, which is associated with the supervisory organization, also determines when the position displays in prompts. If you view the position before its availability	

Field	QuickTip Title	QuickTip Description	Considerations
		date, the supervisory organization is blank.	
Earliest Hire Date	Earliest Hire Date	Enter the earliest date that you can hire a worker into the position. This date can be later than the position Availability Date.	
No Job Restrictions	No Job Restrictions	If you select this check box, it makes all job profiles in the job catalog available for staffing. Provides more flexibility than restricting hiring based on location, worker type, or time type.	
Job Family	Job Family	Enter the job familes associated with the position. This makes all job profiles associated with these job families available for staffing.	
Job Profile	Job Profile	Enter the job profile associated with the position. This makes individual job profiles from one or more job families available for staffing.	
Job Description Summary	Job Description Summary	Enter a summary of the job description for the position. This field automatically populates from the first Job Profile that you select, but you can override it. If you select a job family with multiple job profiles, the job description summary won't automatically populate.	
Job Description	Job Description	Enter a job description for the position.	

Field	QuickTip Title	QuickTip Description	Considerations
Location	Location	Select 1 or more locations for the position. This limits hiring to the listed locations. If you don't select a location, all location partners can hire workers into the position.	
Time Type	Time Type	Select a time type for the position. This limits hiring to the listed time type.	
Worker Type	Worker Type	Select a worker type for the position. This limits hiring to the listed worker type.	
Worker Sub-Type	Worker Sub-Type	Select a worker sub-type for the position. This limits hiring specifically to the listed worker sub-type.	
Critical Job	Critical Job	If you select this check box, it indicates that this is a critical job for hiring. Automatically populates from the Job Profile, but you can override it.	
Difficult to Fill	Difficult to Fill	If you select this check box, it indicates that this is a difficult position to fill for hiring. Automatically populates from the Job Profile, but you can override it.	

Related Information
Tasks
Create Positions
Steps: Set Up and Manage the Guidance Workspace on page 1294

Reference: Sample QuickTips for Edit Service Dates

You can use these sample QuickTips as a starting point when adding your own QuickTips to the Edit Service Dates task using the Guidance Workspace report.

Note: The sample information we provide might not apply to your business needs or tenant configuration. Modify and review all information according to your tenant requirements before publishing this guidance to your tenant.

Edit Service Dates

Field	QuickTip Title	QuickTip Description	Considerations
Worker	Worker	Select the worker from the list.	
Effective Date	Effective Date	Enter the effective date that the service date changes are effective for the worker.	This field displays when you opt in to *Effective Dating for Service Dates* on the Maintain Feature Opt-Ins task. You can't opt out after you opt in.
Original Hire Date	Original Hire Date	Automatically populates from the earliest Hire Date. When you edit the Original Hire Date automatic population no longer occurs.	Used for COBRA eligibility and Form I-9 for US Payroll, and also for the Length of Service in Months from Original Hire Date report field. This service date only applies to employees. To ensure that the date populates automatically again after you have manually edited the date, you can: • Enter a new earliest Hire Date that is before the current Original Hire Date. • Manually edit the Original Hire Date to match the earliest Hire Date. • Rehire the worker.
Continuous Service Date	Continuous Service Date	Automatically populates from the most recent Hire Date. You can change the date to give credit for	To ensure that the date populates automatically again after you have manually edited the date, you can either:

Field	QuickTip Title	QuickTip Description	Considerations
		past employment. When you edit the Continuous Service Date automatic population no longer occurs.	• Manually edit the Continuous Service Date to match the earliest Hire Date. • Rehire the worker. Used in benefit elections, compensation period basis behavior, and length of service calculations. When the Continuous Service Date and Hire Date are the same, correcting the Hire Date automatically corrects the Continuous Service Date. When the 2 dates are different, correcting the Hire Date doesn't affect the Continuous Service Date. You can't manually update the Continuous Service Date field on a *Hire* business process correction.
Length of Service	Length of Service	Automatically calculated from the Continuous Service Date to the current date or termination date. If a worker has a future rehire date, this date calculates from the Continuous Service Date to the termination date, not their planned rehire date. When you rehire a worker, their length of service includes the time that you didn't actively employ them.	Service Length Type field in the Edit Tenant Setup-HCM task to specify the display format.
Benefits Service Date	Benefits Service Date	Enter the date a worker is eligible for benefits.	Available for use in user-defined calculations and eligibility rules.

Field	QuickTip Title	QuickTip Description	Considerations
		This service date only applies to employees.	Workday empties this field during rehire.
Company Service Date	Company Service Date	Enter an additional service date, such as the date of acquisition. This service date only applies to employees.	Available for use in user-defined calculations and eligibility rules. Workday empties this field during rehire.
Time Off Service Date	Time Off Service Date	Enter the date a worker is eligible for time off based on a different service date. Example: Standard time off is 3 weeks per year, but some workers negotiate 4 weeks.	Available for use in user-defined calculations and eligibility rules.
Retirement Eligibility Date	Retirement Eligibility Date	Enter the date a worker is eligible for retirement, such as when eligibility is based on length of service or age. This service date only applies to employees.	Available for use in user-defined calculations and eligibility rules.
Expected Retirement Date	Expected Retirement Date	Enter the date a worker announces as their retirement date. This date only applies to employees.	Available for use in user-defined calculations and eligibility rules.
Seniority Date	Seniority Date	Enter a worker's seniority date based on a date other than Hire Date or Company Service Date. Automatically populates from the earliest Hire Date. When you edit the Continuous Service Date automatic population no longer occurs. This date only applies to employees.	Used in the Length of Service in Months from Seniority Date report field. Available for use in user-defined calculations and eligibility rules.
Severance Date	Severance Date	Enter the date to track how long a worker receives severance pay.	Available for use in user-defined calculations and eligibility rules.

Field	QuickTip Title	QuickTip Description	Considerations
		This date only applies to employees.	Also used in compensation period basis behavior.
Vesting Date	Vesting Date	Enter the date that a worker is fully vested, when this date differs from standard vesting rules. This date only applies to employees.	
Service Dates Change History	Service Dates Change History	Displays a report of all service date changes for the worker.	

Related Information
Tasks
Change Worker Service Dates
Steps: Set Up and Manage the Guidance Workspace on page 1294

Reference: Sample QuickTips for Get Feedback on Self

You can use these sample QuickTips as a starting point when adding your own QuickTips to the Get Feedback on Self task using the Guidance Workspace report.

Note: The sample information we provide might not apply to your business needs or tenant configuration. Modify and review all information according to your tenant requirements before publishing this guidance to your tenant.

Get Feedback on Self

Field	QuickTip Title	QuickTip Description	Considerations
Who do you want to request feedback from?	Who do you want to request feedback from?	Select 1 or more people to request feedback from.	
Make Feedback Anonymous	Make Feedback Anonymous	Select to hide the names of the responders on the feedback.	
Feedback Template	Feedback Template	Select a set of question templates to include with your feedback request.	Do you want to provide guidelines for selecting a feedback template? Is there a resource that users should follow for requesting feedback?
Question	Question	Enter a question you would like feedback on.	Do you want to provide guidelines for entering questions? Is there a resource that users should follow for requesting feedback?

Field	QuickTip Title	QuickTip Description	Considerations
Relates To	Relates To	Select a competency that relates to your question.	Do you want to provide guidelines for selecting competencies? Is there a resource that users should follow for selecting competencies?

Related Information

Concepts

Setup Considerations: Requested Feedback

Tasks

Steps: Set Up and Manage the Guidance Workspace on page 1294

Reference: Sample QuickTips for Give Feedback

You can use these sample QuickTips as a starting point when adding your own QuickTips to the Give Feedback task using the Guidance Workspace report.

Note: The sample information we provide might not apply to your business needs or tenant configuration. Modify and review all information according to your tenant requirements before publishing this guidance to your tenant.

Give Feedback

Field	QuickTip Title	QuickTip Description	Considerations
Worker	Worker	Select 1 or more workers to give feedback to.	
Show my Name	Show my Name	Select to show your name with your feedback.	
Feedback	Feedback	Enter feedback for the worker.	Do you want to provide guidelines for entering feedback? Is there a template that users should follow? Do you have language or style guidelines to provide?
Badge	Badge	Select a badge to give with the feedback.	Do you want to provide guidelines for selecting a badge? Is there a resource that users should follow for giving feedback?

Related Information

Concepts

Setup Considerations: Anytime Feedback

Tasks

Steps: Set Up and Manage the Guidance Workspace on page 1294

Reference: Sample QuickTips for Manage Flex Team

You can use these sample QuickTips as a starting point when adding your own QuickTips to the Manage Flex Team business process using the Guidance Workspace report.

Note: The sample information we provide might not apply to your business needs or tenant configuration. Modify and review all information according to your tenant requirements before publishing this guidance to your tenant.

If your tenant uses custom labels to refer to flex teams or workers, update the QuickTips titles and descriptions to use the custom labels too.

Team Setup

The Create Flex Team, Edit Flex Team, and Revise Flex Team tasks include 2 pages. This section covers QuickTips for the first page, which provides the same options for all flex teams. On the second page, simple and advanced flex teams have different sets of options.

Field	QuickTip Title	QuickTip Description	Considerations
Team Type	Team Type	Select: • *Advanced Flex Team* for a flex team with roles. Each role can have a different settings like location, number of workers, and required skills. • *Simple Flex Team* for a flex team without roles. The flex team settings apply to all members. After you create the team, you can't change the team type.	• Not available when editing a flex team or revising a flex team after submitting it. • Consider adding a link to the Create Flex Teams topic.
Start Date	Start Date	Enter the start date for the flex team.	Flex team roles can have their own start dates.
End Date	End Date	Enter the end date for the flex team. Leave the value blank for an ongoing flex team.	Flex team roles can have their own end dates.
Type	Type	Select the type of flex team.	Configure the type options by accessing the Maintain Flex Team Types task. You can also configure the *Manage: Flex Team Types* domain to restrict some types.
Display Image	Display Image	Select a display image for the flex team.	

Simple Flex Team Member Requirements

These sample QuickTips apply to the options on the second page when creating, editing, or revising a simple flex team.

Field	QuickTip Title	QuickTip Description	Considerations
Required Skills	Required Skills	Select skills that you want the flex team members to have. Your selections improve recommendations for both flex team hosts and candidates.	
Availability	Availability	Select the level of availability that you want flex team members to have.	Configure the availability options by accessing the Maintain Flex Team Availabilities task. Consider including guidelines for availability levels.
Number of Workers	Number of Workers	Enter the maximum number of workers needed for the flex team. You can still complete the flex team when it isn't fully staffed.	
Location	Location	Enter a location for the flex team. Leave the value blank when you're accepting candidates from multiple locations.	
Remote	Office Requirement	Select Onsite, Remote, or both to indicate where flex team members are expected to spend their time while working.	Consider including guidelines for office requirements.
Category	Category	Select the category for the flex team.	Configure the category options by accessing the Maintain Flex Team Categories task.
Add Workers	Add Workers	Add workers to the flex team. After you create the flex team, Workday recommends candidates for it.	

Advanced Flex Team Roles

These sample QuickTips apply to the options on the second page when creating, editing, or revising an advanced flex team.

Field	QuickTip Title	QuickTip Description	Considerations
Role Title	Role Title	Enter a title for a role in the advanced flex team.	

Field	QuickTip Title	QuickTip Description	Considerations
Role Description	Role Description	Enter a description for the role. This field shows the flex team description by default.	
Skills Needed for Role	Skills Needed for Role	Select skills for the role. Your selections improve recommendations for both flex team hosts and candidates.	
Start Date	Start Date	The start date for the role.	This field shows the flex team start date by default.
End Date	End Date	The end date for the role. Leave it blank for an ongoing role.	This field shows the flex team end date by default.
Availability	Availability	Select the level of availability that you want flex team members to have.	Configure the availability options by accessing the Maintain Flex Team Availabilities task. Consider including guidelines for availability levels.
Number of Workers	Number of Workers	Enter the maximum number of workers needed for the role. You can still complete the role when it isn't fully staffed.	
Location	Location	Enter a location for the role. Leave the value blank when you're accepting candidates from multiple locations.	
Remote	Office Requirement	Select Onsite, Remote, or both to indicate where workers in this role are expected to spend their time while working.	Consider including guidelines for office requirements.
Category	Category	Select the category for the role.	Configure the category options by accessing the Maintain Flex Team Categories task.
Add Worker	Add Worker	Add workers to the role. After you create the flex team, Workday recommends candidates for it.	

Related Information

Concepts

Concept: Flex Teams

Electronic Signatures

Set Up Adobe Sign

Prerequisites

Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Context

You can enable users to sign documents virtually using Adobe Sign by integrating your existing Adobe Sign account to your Workday tenant.

When you enable Adobe Sign, you can:

- Have users sign documents using Adobe Sign in addition to the Workday default electronic signature.
- Distribute documents for signature as part of a review document step in a business process.

Note:

You can't use the Adobe Sign eSignature integration with any document that contains an ampersand (&) in their filenames.

Steps

1. Access the Edit Tenant Setup - Business Processes task.
2. As you complete the eSignature Configuration section for Adobe Sign, consider:

Option	Description
Authenticate with Adobe	Verify that 2-Step Verification and Single Sign On (SSO) are disabled in your Adobe account. Enter the email address and password associated with your enterprise Adobe Sign account for Workday to return signed documents to recipients. For legacy Adobe Sign integrations that are currently authenticated in Workday, a View Adobe Sign Account Detail option is available in the Authenticate with Adobe drop-down prompt on the Edit Tenant Setup - Business Processes task. The View Adobe Sign Account Detail window shows the user account details that were most recently used for authentication. If OAuth Authentication is enabled on a legacy Adobe Sign account, you can also view the associated account details in View Adobe Sign Account Detail. Note: The View Adobe Sign Account Detail option is not available after running the Remove eSignature Configuration task.

Result

Adobe sends an initial email message to notify signers that a document is awaiting their signature. To disable this message for the Workday integration, contact Adobe Support.

Users must sign Adobe Sign documents using My Tasks in Workday, not through an Adobe Acrobat account.

Next Steps

Set up a *Review Documents* step to use a business process to distribute documents to workers.

Distribute documents in bulk by using the Create Distribute Documents or Tasks task.

Workday retrieves signatures from Adobe hourly. If you need to retrieve signatures immediately on documents that aren't created on the Create Distribute Documents or Tasks task, access the Update eSignature Status task.

You can access the Remove eSignature Configuration task to delete all existing configuration for the Adobe Sign eSignature integration. Consider that, when you delete configuration, the eSignature provider is no longer available when setting up the *Review Documents* step and any in-progress events using the selected configuration are lost.

Set Up DocuSign

Prerequisites

You must already have a DocuSign account and set Data Population Scope to *Envelope* in your account settings.

Verify that 2-Step Verification and Single Sign On (SSO) are disabled in your DocuSign account before authenticating in Workday.

Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Context

You can enable users to sign documents virtually using DocuSign by integrating your existing DocuSign account with your Workday tenant, and:

- Have users sign documents using DocuSign in addition to the Workday default electronic signature.
- Distribute documents for signature as part of a review document step in a business process.

Steps

1. Access the Edit Tenant Setup - Business Processes task.

   Configure anchor text values.
2. As you complete the eSignature Configuration section, click Configure DocuSign Anchor Text.
3. Select a tab type in the DocuSign Tab Type column.

   See Concept: DocuSign Tabs.
4. In the Anchor Text column, enter the custom anchor text that you want to map to the DocuSign tab and display as a placeholder on the document.

   Example: You want the recipient to provide their full name on the document. In DocuSign, you placed the fullName tab in the desired location on your document template. In Workday, you select the fullName DocuSign tab type in the DocuSign Tab Type column. You want to map the text *Last,* *First Name* to this tab type and display it as a placeholder on the document, so you enter *Last, First Name* in the Anchor Text column.

Note: DocuSign can't detect anchor text in a document that:

- Contains these special characters or strings @, </, />.
- Is embedded in an image.
- Is embedded in the form of a PDF XObject.

You must also append the order number of the signing group to the custom anchor text. Example: Your custom anchor text is *signHerePlease*. Enter *signHerePlease1* to mark the place you want the first (or only) signing group role to sign. Enter *signHerePlease2* to mark the place you want the second signing group role to sign, and so on. If there's only 1 signing group, you still must append 1 to the signing group anchor text.

For more information, see the DocuSign website.

5. Click OK and Done.
6. Access the Edit Tenant Setup - Business Processes task again.
7. Click Authenticate with DocuSign.

   To switch between Production and Sandbox accounts, click Edit.
8. Enter the email and password for your administrator DocuSign Production or Sandbox account when the DocuSign login page displays.
9. Click Done.
10. Access the Edit Tenant Setup - Business Processes task again and click Confirm DocuSign Account ID to select the DocuSign account ID that you want to use.
11. Click OK.

Result

The DocuSign Configuration Enabled check box is selected to indicate that authentication was successful.

Next Steps

Set up a *Review Documents* step on a business process to distribute documents to workers.

Distribute documents in bulk using the Create Distribute Documents or Tasks task.

You can access the Remove eSignature Configuration task to delete all existing configuration for the DocuSign eSignature integration. Consider that, when you delete configuration, the eSignature provider is no longer available when setting up the Review Documents step and any in-progress events using the selected configuration are lost.

Related Information

Concepts

Concept: Review Documents Step on page 985

Add Documents to Workday on page 380

Translate Business Object on page 364

Concept: DocuSign Tabs

Your DocuSign configuration controls how eSignatures work in Workday.

Tabs

Tabs are areas on a DocuSign document where the recipient adds information, such as a signature or date. Workday supports these tabs:

- Title

- signHere
- signHere-Optional
- initialHere
- initialHere-Optional
- fullName
- dateSigned

You can drag and drop tabs to desired locations on a document in the DocuSign web application.

Concept: Track Document Signatures

You can use business process history records to track the status of the document review step. For example, when you click on a process in the Process Status worklet, Workday displays the status of all events in the business process, including the *Review Documents* step, in the Process History section on the Process tab.

When the status of the *Review Documents* step is Complete, select Business Process > Full Process Record from the related actions menu of the event. Click the Documents tab to view the signature, signature type, signature statement, and signature date for every document reviewed as part of the business process. Signed documents may not be visible to certain users in the Documents tab if they meet the exclusion criteria of an intersection security group. Example: As a security administrator, you use a role-based security group to restrict access to compensation data among HR Partners and exclude users from the HR Partners security group. You can also view a snapshot of the document at the time that it was reviewed and signed.

Note: Workday appends "_uploaded" to the document name of all uploaded documents.

In addition, if a worker-related event is completed along with the *Review Documents* step, the event automatically updates the worker document file with the signature, signature type, signature statement, and signature date for every document reviewed as part of the business process.

To view the worker document file for a selected worker, run the Maintain Worker Documents report.

Related Information
Concepts
Concept: Review Documents Step on page 985

Concept: eSignature Integrations Best Practices

To ensure successful authentication and optimize performance for the DocuSign and Adobe Sign eSignature integrations in Workday, always use these best practices:

Note: See Troubleshooting: eSignature Integrations for a description of integration problems, their possible causes, and recommended resolutions. For issues related to generated documents, see Troubleshooting: Generated Documents.

Configuring Integrations

Recommendation	Description
Assign at least 1 role in a signature group.	The integration fails and Workday logs an error message in Process Monitor if a signature group contains no assigned roles, and there are no other signers in that signature group.
Don’t use Adobe Sign with documents that contain prefill tags, or have an ampersand (&) in their filename.	You can't use the Adobe Sign eSignature integration with any document contains: • An ampersand (&) in their filename.

Recommendation	Description
	• A prefill tag requiring the sender to add information before Workday sends the document.
Apply the necessary settings in your DocuSign account before authenticating in Workday.	Ensure that: • Data Population Scope is set to *Envelope* in your DocuSign account settings. • 2-Step Verification and Single Sign On (SSO) are disabled in your DocuSign account settings.
Complete both DocuSign authentication steps.	Ensure that you complete both authentication steps described in Set Up DocuSign. Failure to follow these steps can cause delays in transferring the documents between Workday and DocuSign.

Testing Integrations

Recommendation	Description
Disable notification and message settings in Adobe when testing in non-Production tenants.	When testing in Workday, please open a support ticket directly with Adobe to ensure that notification and message settings are disabled in Adobe. This prevents unwanted notifications while testing your Adobe Sign integration in a non-Production tenant.
Disable notifications on business processes when testing in non-Production tenants with a larger audience.	Non-Production tenants send notifications and emails as normal to users if configured to do so. When testing an audience that isn't administrators or test users, ensure that email and task notifications are disabled.
Authenticate the Adobe Sign and DocuSign integrations directly in Workday Sandbox and other non-Production tenants to test them.	Any changes to the configuration of a business process involving *Review Documents* steps are copied from Production tenants to Workday Sandbox and other non-Production tenants. Example: In your Production tenant, you change the condition rules on the *Review Documents* step that make a document available to electronically sign. This update is copied to the business process configuration in your Sandbox tenant. However, Workday doesn't allow credentials that are configured in Production environments to be used in non-Production environments. See Set Up Adobe Sign and Set Up DocuSign for authentication instructions. For more information on eSignature configuration options on the Edit Tenant Setup - Business Processes task, see Reference: Edit Tenant Setup - Business Processes.

Recommendation	Description
Use Workday tasks to check the status of *Review Documents* steps configured for an eSignature integration.	Workday provides you with these tasks (secured to the Business Process Administration domain in the System functional area) to check the status of *Review Documents* steps configured for an eSignature integration: • Check eSignature Signing Status • Update eSignature Status
Reconfigure Adobe or DocuSign in Sandbox tenants after the weekly refresh.	Workday doesn’t allow credentials that are configured in Production environments to be used in Sandbox environments. Therefore, after each weekly refresh, customers must reconfigure Adobe or DocuSign in their Sandbox tenants.
Use your eSignature provider’s non-production accounts for Workday Sandbox and other non-Production tenants.	If you have a sandbox or test account with your eSignature provider, we recommend that you use this instead of your production account in Workday Sandbox and other non-Production tenants.
For Adobe or DocuSign events initiated in Production, reinitiate them after authentication when testing in Sandbox.	You can't action Production events involving Adobe or DocuSign in Sandbox. Therefore, when testing in Sandbox tenants, you must reinitiate eSignature events following authentication.

Integration Requirements

Recommendation	Description
Ensure that all signers have a valid, unique email address.	Otherwise: • Workday stops the integration. • Workday uses Process Monitor to notify the Business Process Administrator that the integration stopped because 1 or more signers are missing an email address or different signers have the same email address.
Signers must have a different address to the Adobe Sign Sender Email Address.	If you use the Adobe Sign eSignature integration, verify that a signer doesn't have the same email address as the Adobe Sign Sender Email Address.

Reference: Adobe Sign Email Notification Settings

You can use the Edit Tenant Setup - Business Processes task to configure Adobe Sign completion email notifications related to *Review Documents* steps in Production and non-Production tenants:

Tenant Type	Default Notification Settings
Production	The signer/recipient receives Adobe Sign email notifications after signing Adobe Sign documents distributed through a *Review Documents* step. To suppress these notifications, select the Disable Adobe Sign Completion Email Notifications for Production Tenants option on the Edit Tenant Setup - Business Processes task.
Non-Production/Sandbox/Implementation	The recipient doesn’t receive Adobe Sign email notifications after signing Adobe Sign documents that are distributed through a *Review Documents* step. To enable these notifications, select the Enable Adobe Sign Completion Email Notifications for Non-Production Tenants option on the Edit Tenant Setup - Business Processes task.

Note: To change Adobe Sign email notification settings related to the *Distribute Documents or Tasks* business process, contact Adobe directly.

Configuration Impact on Email Notifications

This table provides Adobe Sign email notification configuration scenarios in Production and non-Production tenants:

Disable Adobe Sign Completion Email Notifications for Production Tenants check box selected	Enable Adobe Sign Completion Email Notifications for Non-Production Tenants check box selected	Result in Production Tenant	Result in Non-Production Tenant
No	Yes	Adobe Sign sends an email notification.	Adobe Sign sends an email notification.
Yes	No	Adobe Sign doesn't send an email notification.	Adobe Sign doesn't send an email notification.
Yes	Yes	Adobe Sign doesn't send an email notification.	Adobe Sign sends an email notification.
No	No	Adobe Sign sends an email notification.	Adobe Sign doesn't send an email notification.

Troubleshooting: eSignature Integrations

This topic provides strategies for diagnosing and resolving these eSignature integration issues:

- The DocuSign integration is stuck in Awaiting Integration Response status on a *Review Documents* step.
- Review Documents steps that use DocuSign and are triggered as part of a business process fail with an Unauthorized error.
- A worker has already signed a document in Adobe Sign, but the Distribute Documents or Tasks event in the worker's history shows an overall status of In Progress.

Note: See Concept: eSignature Integrations Best Practices for guidelines about authenticating and optimizing DocuSign and Adobe Sign eSignature integration performance.

The DocuSign integration is stuck in Awaiting Integration Response status on a Review Documents step.

Cause: DocuSign Connect is configured incorrectly in the integration setup between Workday and DocuSign.

Solution:

Steps

1. From the related action menu on the Review Documents step, select Business Process > Update eSignature Status.
2. Reauthenticate using the instructions in Set Up DocuSign.
3. Review the DocuSign Connect configuration in your DocuSign account to ensure:
   - In the Connect section, your tenant name should be there and the status should be Active.
   - In the Event Settings section, Data Format should be set to Legacy and Event Message Delivery Mode should be Aggregate.

   Test this using the Update eSignature Status task on the *Review Documents* step (select Event > Related Action > Business Process > Update eSignature Status). If this resolves the issue, you must review the Connect configuration in your DocuSign account and reauthenticate. See Set Up DocuSign for authentication instructions

   If reauthentication is successful, you should see the tenant name in the Connect section of your DocuSign account and a status of *Active*. Please also note that if you navigate to the Event Settings section of the active account, the Data Format field should be *Legacy*, and Event Message Delivery Mode should be *Aggregate*. Otherwise, please contact DocuSign support directly for guidance to prevent delays in the integration response.

Review Documents steps using DocuSign fail with an Unauthorized error when triggered as part of a business process.

Cause: The DocuSign account is blocked by Single Sign On (SSO) because Workday doesn't support SSO with DocuSign.

Solution: In your DocuSign account:

- Verify that 2-Step Verification and SSO are disabled in your DocuSign account before authenticating in Workday.
- Provide an exception to the SSO policy for certain users or consider exempting the account that is used for authentication from SSO. See DocuSign's documentation about excluding specific users from SSO requirements.

To re-establish the connection in Production, log out of DocuSign and reauthenticate the DocuSign integration (see Set Up DocuSign for instructions).

A worker has already signed a document in Adobe Sign, but the Distribute Documents or Tasks or Review Documents event in the worker's history shows an overall status of In Progress.

Values for Signed By and Signature Date are also missing in the Personal > Documents tab and the Full Process Record of the event.

Note: The Full Process Record of a business process displays an Integration Error tab when a business process event includes an eSignature integration that didn't complete due to an error. You can use the information on this tab to troubleshoot the error.

Cause: The task has not yet been submitted in Workday.

Solution: When distributing a document using Adobe Sign and signing directly in Adobe, the document is still awaiting action and hasn't yet been submitted by the worker in Workday. Therefore, the overall event status is still *In Progress*.

This is expected behavior and the Signed By and Signature Date values only display when the task is submitted by the worker. To update the status in Workday, the worker must submit the pending item in My Tasks.

A worker has signed a document, but it's not visible on the Documents tab on their worker profile.

Workers can view their reviewed documents when they select Personal > Document on their worker profile. Users can also view other workers' documents if they're associated with the business process that routes the document.

Workday can't fetch documents and save them to the worker profile if you don't follow your eSignature provider's document name character limits. When creating a document in Workday, Adobe document names (including the file extension) must be fewer than 250 characters, and DocuSign document names must be 95 characters or less. You must also avoid using workarounds to enter a name that exceeds the maximum limit after creating a document (Example: Using the Edit Document task).

Related Information
Concepts
Concept: Review Documents Step on page 985
Set Up DocuSign on page 1338
Set Up Review Documents Steps on page 377

Troubleshooting: Generated Documents

This topic provides strategies for diagnosing and resolving these generated document issues:

- Workers can't view generated documents in their worker profiles.
- The generated document on a Review Documents task is missing in a worker's My Tasks.
- A user receives the following error when when migrating a BIRT document from a Preview tenant to a Sandbox tenant using Object Transporter OX 2.0: "You cannot edit Document Template with a past effective date."

Workers can't view generated documents in their worker profiles.

Cause: The worker doesn't have the necessary access to domain security policies that enables them to view generated documents.

Solution: Ensure the worker and applicable security group has the appropriate access to the required domain security policies using the steps below.

Security: *Security Activation* domain in the System functional area.

Steps

1. Access the Domain Security Policies for Functional Area report.

2. Ensure the security group that the worker belongs to has access to these domain security policies:
    - *Self-Service: View Generated Documents*
    - *Worker Data: View Generated Documents*

    When the document is generated through:

    - An integration, the worker must also have access to the *Integration Event* domain.
    - A job application or candidate action, the worker must also have access to these domains:
        - *Candidate Data: Attachments*
        - *Candidate Data: Offer Details*
        - *Pre-Hire Data: Employment Agreement*

    For more information, see Reference: Candidate Attachments on Candidate and Worker Profiles.

    Ensure that the worker has appropriate access to the following domain security policies:

    - *Worker Data: Add Worker Document or Worker Data: Edit and Delete Worker Documents*
    - *Worker Data: View Generated Documents*
    - *Self-Service: View Generated Documents*

    For job application or candidate generated documents, the following domain security policies apply:

    - *Candidate Data: Attachments*
    - *Candidate Data: Offer Details (Offer Attachments)*
    - *Pre-Hire Data: Employment Agreement (Employment Agreement Attachments)*

The generated document on a Review Documents task is missing in a worker's My Tasks.

Cause: The Workday account of the worker specified in the Run As User field of the Review Documents step configuration is inactive or set to wd-support (see Configure Generated Documents for more information on the Run As User field).

Solution: Reactivate the inactive worker on the Edit Workday Account task or assign a new worker by:

Steps

1. Accessing the business process definition that contains the *Review Documents* step.
2. Clicking Configure Review Document Step and specify an effective date.
3. Clicking OK to proceed.
4. Selecting the Run As User tab and entering a valid user.

Solution: If the Workday account of the selected user in the Run As User field of the *Review Documents* step configuration is inactive, assign a new user:

Steps

1. Navigate to the business process definition that contains the *Review Documents* step.
2. Click Configure Review Document Step and specify an effective date.
3. On the Configure Review Document Step page, click OK to proceed.
4. Select the Run As User tab and enter a valid user.
5. Click OK.

Solution: If Run As User is set to wd-support:

Steps

1. Click Configure Generate Document on the *Generate Document* step.
2. Replace wd-support with an administrator account.

Cause: The condition rule criteria on the *Review Documents* step are not met (for documents that aren't configured for DocuSign or Adobe Sign).

Solution: Check that any condition rules on the generated document are configured correctly. To edit or view condition rules:

Steps

1. Select Business Process > Edit Definition from the related actions menu of the business process.
2. On the *Review Documents* step, click Configure Document Review to access the Configure Review Document Step task.
3. Check the currently configured rules in the Condition field.

A user receives the following error when when migrating a BIRT document from a Preview tenant to a Sandbox tenant using Object Transporter OX 2.0: "You cannot edit Document Template with a past effective date."

Cause: You can't use Object Transporter OX 2.0 for migration if the effective date of the source document is in the past, and if the target tenant has an identical document.

Solution: In the source tenant (in this case, the Preview tenant), you need to change the document's effective date to a date in the future before attempting to migrate the document again using Object Transporter OX 2.0.

Example: You want to migrate a document from a Preview tenant to a Sandbox tenant. The Sandbox tenant (the target tenant) contains an identical document. The effective date of this document in the Preview tenant (the source tenant) is 4 months in the past, so you update it to today's date or a future date to prevent a migration error.

Worktags

Setup Considerations: Worktags

You can use this topic to help make decisions when planning your configuration and use of worktags. It explains:

- Why to set them up.
- How they fit into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What They Are

Using key words, the Worktag feature enables you to define fields and field selections to categorize and report on transaction and accounting information.

Business Benefits

Classify information for analysis in reports:

- Create worktag hierarchies for navigation, validation logic, and condition rules.
- Improve differentiation of key data for more effective transaction reviews.
- Capture revenue, cost, and profitability in ledgers.
- Assign roles to certain worktags for business process approval and reporting.

- Assign worktags to workers so that financial transactions, such as expense reports, automatically route to specific people based on their roles.

Guide data entry on tasks:

- Ensure that workers enter valid combinations of default values.
- Eliminate the need for input error messages.

Use Cases

You can assign worktags for the department and project on expense reports and purchase orders, then run reports to view total expenses for each worktag. You can use worktags to:

- Track customers, cost centers, and suppliers on invoices.
- Capture information about a worker's hours for costing, specific projects, and budgeting.
- Enable users to select worktags to track information when entering payroll input or when making manual or on-demand payments.
- Create a custom organization such as *Store* as a worktag and assign it to workers. You can then track sales transactions, and other employee-related information, by *Store*.

Questions to Consider

Questions	Considerations
What types of data do you want to categorize for analysis?	You can define custom worktags and Workday also delivers many worktag types to tag business transactions. Examples: • Business Unit • Company • Cost Center • Customer • Employee • Supplier
Which of your tasks can benefit from automating or simplifying data input?	You can automate a sequence of data entry fields while making some input required so that important components aren't forgotten. Example: You can use these delivered fields for payroll entry: • Pay Component • Pay Group • Pay Rate Type • Payroll City Authority • Payroll County Authority • Payroll State Authority
How detailed are your key performance indicators?	You can break down performance indicators into more granular categories and track changes more thoroughly.

Recommendations

- Configure the default worktag types for transactions that you load using web services to help with integrations.
- Relate worktags to other worktags and control their combinations by defining default and allowed values.

- Determine the worktag types that are relevant to each transaction type for your organization.
- Sequence your primary worktags to optimize automatic behavior.
- When you use worktags for payroll and financials, evaluate worker organization assignments carefully. Many worktag types support organization hierarchies for collective reporting.

Requirements

No impact.

Limitations

- You can configure a maximum of 10 custom organization types as financial worktags.
- You can configure a maximum of 15 custom worktag types.
- Some transaction types don't support the *Disallow Inactive Values* option.
- Not all transaction types support all worktag types. Workday controls the worktag types that you can enable for each transaction type.
- Changes to worktag configurations only affect transactions that you edit or correct.
- In web services for objects with worktags, Workday determines the order for default values based on a single set configured on the Maintain Worktag Type Precedences task.

Tenant Setup

- Workday stores related worktag configuration, for defaults and allowed values, for all transactions with the worktag type.
- You can select tenant-wide configurations on the Edit Tenant Setup - Financials task to include worktag types in banking options, expense options, work-in-progress accounting, and retained earnings.

Security

Configure these domains in the Worktags functional area:

Domains	Considerations
Manage: Related Worktags	Users can manage default and allowed values for worktag types enabled for related worktags.
Set Up: Worktags	Users can enable and maintain worktags and view related reporting.
Worktag REST API	Users can retrieve and load default and allowed values using a web service for any related worktag taggable type.

Business Processes

No impact.

Reporting

Reports	Considerations
Custom Worktag Counts	Display enabled custom worktags.
Custom Worktag Values	Display custom worktag values for each custom worktag type.

Reports	Considerations
Maintain Custom Worktag Values	Display, edit, and inactivate worktag values for a custom worktag type.
Maintain Related Worktag Usage	Display and edit allowed worktag type configuration for objects that support related worktags.
Maintain Worktag Type Precedences	Specify the worktag types to consider, and the order in which to consider them. Display and edit allowed worktag type configuration for objects that support related worktags.
Maintain Worktag Usage	Display and edit allowed worktag type configuration for transaction types that support worktags.
Related Worktags	Display related objects set up for taggable types.
View Worktag Type Configurations	Display worktag type configurations for accounting worktag types.
Worktag Types for Taggables	Display the worktag types that Workday allows, and the worktag types that Workday enables for all transaction types and objects that support worktags.

Integrations

Workday provides several web services, including:

Web Services	Considerations
Get Custom Worktags *Put Custom Worktag*	Enables you to retrieve and create or update custom worktags.
Get Default Values for Worktags	Enables you to retrieve existing default values configured for worktags.
Get Related Worktags for Worktags *Put Related Worktags for Worktag*	Enables you to retrieve and create or update related worktags.
Get Worktags Tax Rules *Put Worktags Tax Rule*	Enables you to retrieve and create or update worktag tax rules.
Put Integration Worktag Mapping	Enables you to create or update available worktag mapping.

Connections and Touchpoints

Features	Considerations
Finance, Ledger Accounting	Display and edit allowed worktag type configuration for objects. All financial transactions carry over to ledger as accounting entries with the same worktag on the transaction.

Features	Considerations
Human Capital Management	In Human Capital Management, organization assignments become worktags in self-service transactions.
Payroll	Worker organization assignments, and any associated fields, display for worker self-service transactions and payroll.
Student	In Student, worktags assigned to financial transactions flow to operation journals.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Concepts

Setup Considerations: Accounting and Worktags for Student Financials

Tasks

Maintain Organization Types on page 876

Examples

Steps: Enable Worktags for Cost Allocations

Steps: Define Custom Worktags

Context

Custom worktags enable you to view critical dimensions of your business that Workday-delivered worktag types don't cover. Example: You can define a Campaign worktag type with valid values of *Spring* and *Summer*. You can use these values to track leads, expenses, revenue, and campaign effectiveness.

You can:

- Define up to 15 custom worktag types on financial, payroll, and time-tracking transactions.
- Use custom worktags in pay component calculations.
- Create prompt fields for custom worktag business objects, so that reports that contain prompts for custom worktags can use prompt sets.

You can use custom organization as worktags to:

- Assign worktags to workers so that Workday automatically routes financial transactions, such as expense reports, to specific people based on their roles.
- Assign roles to worktags for business process approval and reporting.
- Create worktag hierarchies for navigation, validation logic, and condition rules.

Steps

1. Access the Enable Custom Worktags task.

   Enable custom worktag types for transactions and supporting data.

   Security:

   - *Set Up: Enable Worktags* domain in the Common Financial Management and Worktags functional areas.
   - *Set Up: Payroll - Company Specific (Accounting)* domain in the Core Payroll functional area.

2. Access the Maintain Custom Worktag Values report.

   Create worktag values for each custom worktag type.

   Security:

   - *Set Up: Maintain Custom Worktags* domain in the Common Financial Management and Worktags functional areas.
   - *Set Up: Payroll - Company Specific (Accounting)* domain in the Core Payroll functional area.
3. (Optional) Set Up Custom Validation Severity and Conditions.

   Define custom validations that control the use of active and inactive worktags.
4. (Optional) Create Business Process Condition Rules on page 1011.

   Define business process condition rules that control the use of active and inactive worktags.
5. (Optional) Access the Edit Custom Worktag task.

   Rename or inactivate worktag values.

   Security:

   - *Set Up: Maintain Custom Worktags* domain in the Common Financial Management and Worktags functional areas.
   - *Set Up: Payroll - Company Specific (Accounting)* domain in the Core Payroll functional area.
   - *View: Maintain Payroll Interface* domain in the Payroll Interface functional area.
6. (Optional) Configure Related Worktags on page 1354.

Result

Custom worktag values are available on transaction prompts and related worktag configurations on these reports:

- Maintain Worktag Usage
- Maintain Related Worktag Usage

Next Steps

Run the Custom Worktag Values report (secured to the *Set Up: Maintain Custom Worktags* domain in the Common Financial Management and Worktags functional areas and the *Set Up: Payroll - Company Specific (Accounting)* domain in the Core Payroll functional area) to view custom worktag values and identify the number of transactions processed by each.

To prevent users from repeatedly entering the same custom worktag values in reports, you can use the Create Prompt Set task to create and use new prompt fields for custom worktag business objects.

Steps: Set Up Custom Organizations as Worktags

Context

Configure custom organization worktags and custom worktags for use in financial transactions.

For financial transactions, use custom organizations as worktags instead of custom worktags when you need to:

- Assign to workers. When you select a worker in a transaction that has worktags, Workday populates the worker's assigned organizations, including custom organizations.
- Assign roles.
- Participate in business process approval and reporting.
- Create worktag hierarchies for navigation, validation logic, and condition rules.

Use custom worktags when you only need a simple tag for financial transactions that don’t require any of the preceding capabilities or a calculation worktag for pay component configuration.

Example: Define an organization type of *Store*. Create a custom organization with the *Store* organization type for the *San Francisco Store* and *New York City Store* locations.

Use the Maintain Worktag Type Precedences task to configure related worktags so that when workers who are members of the *San Francisco Store* create expense reports, Workday automatically displays the store worktag on their expense reports.

Assign a *Store Manager* role to the *San Francisco Store*. Set up the *Create Expense Report* business process to route to the *Store Manager* whenever an employee of that store submits expenses.

Note: You can't use:

- Custom organizations as worktags for pay component configuration.
- Custom worktags for payroll costing allocations.

Steps

1. Access the Maintain Organization Types on page 876 report to define organization types and make them available for use with financial transactions. Associate worktags to a custom organization dimension.
2. Access the Create Custom Organization task to create custom organizations for the organization type.

   You can also relate worktags to the custom organization. When you enter the custom organization on a transaction that has worktags, Workday pulls the related worktag from the custom organization into the Worktags field. The latest default for a worktag type overrides any previous value.

   Security: *Create: Custom Organization* domain in the Organizations and Roles functional area.
3. (Optional) Make a worker a member of the custom organization so that the custom organization automatically populates as a worktag into transactions that involve the worker.

   See ../../../human-capital-management/staffing/organization-assignments/dan1370797385492.dita.

Result

The organizations you configure become available as worktag choices on financial transactions.

Related Information

Concepts

Concept: Custom Organizations on page 879

Create Basic Worktags

Prerequisites

Security: *Set Up: Basic [Worktag Type] Worktag* domain in these functional areas:

- Common Financial Management
- Worktags

Context

You can create basic worktags without enabling financial-specific domains for HCM, payroll, financial management, and spend. Use basic worktags when you don't need to create detailed definitions for:

- Customers
- Gifts
- Grants
- Projects
- Sales items

- Suppliers

Create a basic worktag when you want to create an object like a customer or supplier as a worktag only. If you require more details in the future, you can convert to full definitions and preserve the worktag history. You can select basic worktags for:

- All financial transactions including requisitions, spend authorizations, and expense reports.
- Contingent worker contracts (basic supplier only).
- Payroll input by worker (basic project only).

Example: You hired a contingent worker through a new supplier. You don't want to define an account for the supplier, but you want to track the contingent worker contract. You can tag the contingent worker contract with a supplier name without defining a supplier account.

Steps

1. Access the applicable report or task:
    - Maintain Basic Customers
    - Create Basic Gift
    - Maintain Basic Grants
    - Maintain Basic Projects
    - Maintain Basic Sales Items
    - Maintain Basic Suppliers
2. Enter a unique name for each of these basic worktag types:
    - Gifts
    - Grants
    - Projects

    You can use the name for each of these basic worktag types more than once:

    - Customers
    - Sales Items
    - Suppliers

    To make basic worktag types distinguishable in prompts, Workday recommends using unique names.

Next Steps

(Optional) Convert Basic Worktags to Full Definitions on page 1359.

Related Information
Tasks
Edit Domain Security Policies
Create Basic Gifts
Create Basic Project Worktags

Configure Related Worktags

Prerequisites

Security: *Set Up: Enable Worktags* domain in the Common Financial Management and Worktags functional areas.

Context

Configure how you want to use related worktags in transactions and on tasks so that the available related worktag types make sense for your business. How you set up related worktags determines the related worktags available in the worktag grid on tasks for setup objects. Example: Create Cost Center or Edit Cost Center.

Use related worktags to help:

- Guide data entry in tasks.
- Eliminate the need for some custom validations.
- Make transaction reviews more effective by giving better differentiation of key data.
- Ensure that workers enter valid combinations of default values.

You can define related worktags for:

- Cost centers
- Customers
- Custom organizations
- Expense items
- Gifts
- Grants
- Loans
- Programs
- Projects
- Purchase items
- Regions
- Revenue categories
- Sales items
- Spend categories
- Sponsors
- Student award items
- Student charge items
- Student waiver items
- Suppliers

Steps

1. Access the Maintain Related Worktag Usage report.
2. As you complete the task, consider:

Option	Description
Order	Determine the order that related worktag types appear in setup tasks where either allowed or default values are set up for related worktags.
Worktag Type	Select worktag types for which you want to define default and allowed values.
Default Required	Select default worktag you want to use on setup tasks. During data entry, Workday validates the worktag values workers enter.
Required on Transaction	Requires a value on transactions when the worktag type is configured as a primary or additional worktag type.

Option	Description
Allowed Values Enabled	Because you can only define allowed values in 1 direction for organization types, you should consider how you want to use related worktags between organizations before setting up allowed values. Example: If you configure grants to have allowed values for cost centers, then cost centers can't have allowed values for grants.
Disallow Inactive Values	Select to disallow inactive worktag values for these organization types: • Cost centers • Regions • Locations • Pay groups • Custom organizations • Supervisory organizations Workday prevents inactive values from: • Being selected as allowed values. • Displaying in searches for allowed values.

Result

When you configure related worktags for a specific worktag, Workday uses your configuration to control which worktag types are available to assign default and allowed values.

For purchase and sales items, Workday pulls in the spend or revenue category and its worktags. When the related worktag from the item and category are the same worktag type, the value from the item takes precedence because it's more specific.

Based on the configuration on the Maintain Worktag Usage report for the transaction and the allowed value combinations, Workday defaults only the related worktags that are valid and allowed for a transaction. Using related worktags, you can fine-tune the combinations of worktags allowed in most financial and payroll costing allocation transactions.

For each object, Workday displays the worktag type a separate row in the task where default and allowed values are defined.

You can use the *Put Related Worktags* web service to load related worktags for any *business object* that supports related worktags. On web services in Inventory, Procurement, and Supplier Accounts in Financials, Workday automatically populates your configured related worktags into a transaction one time.

Example

You create a customer invoice and the customer has *Western USA* as its region worktag, that region automatically populates in the invoice as a worktag. You then select the *Solar Energy* project as another worktag, its worktags automatically populate into the invoice, as well. If that project worktag has *Eastern USA* as its related worktag, the related worktag configuration replaces the *Western USA* region worktag from the customer.

Configure Worktag Defaulting

Prerequisites

Security: *Set Up: Enable Worktags* domain in the Common Financial Management and Worktags functional areas.

Context

Configure the default worktag types for transactions that you load using web services.

Steps

1. Access the Maintain Worktag Type Precedences task.
2. As you complete the task, consider:

Option	Description
Enable Worktag Type Precedence	Check to confirm that you want to define the default order of worktag types when using web services. The check box is no longer visible once selected.
Default Related Worktags from Worker's Organization Assignments	Select to have Workday default the worktag types on all self-service financial transactions where the assigned organizations of a worker automatically populates into the Worktags field. Example: For expense reports and requisitions, related worktags of assigned organizations never override the worker's assigned organizations.
Taggable Transactions to Not Default Worker Organization Assignments as Worktags	When *Worker* is selected as a worktag, you can select the transactions that you don't want to have the default worker organization assignment. Workday excludes these types of self-service transactions from the list of options: • Expense report • Spend authorization • Requisition • Worksheet
Worktag Type	In the grid, add each Worktag Type that you want to default on transactions sent by web service. Workday automatically populates only valid worktag types and values for the transaction. Organize the worktag types in the descending Order of how you want Workday to evaluate them.

Result

For transactions that you load through web services or that default from organization assignments, Workday processes related worktags in this order:

- Worktags sent in on the transaction through web services.
- Organization worktags assigned to the worker.

- Related worktags based on the precedence you define.

Configure Worktags for Transactions

Prerequisites

Security: *Set Up: Enable Worktags* domain in the Common Financial Management and Worktags functional areas.

Context

You can configure worktags for use in transactions and on tasks, according to your business needs. You can set up worktags to:

- Streamline data entry.
- Eliminate the need for some custom validations.
- Make transaction reviews more effective by improving differentiation of key data.

When you enable worktag balancing in your tenant on the Maintain Worktag Balancing Configuration task, Workday makes balancing worktag types available and required on tasks and transactions.

Steps

1. Access the Maintain Worktag Usage report.
2. Select a transaction type to configure.

   As you complete the configuration, consider:

Option	Description
Accounting Journal	Since Workday creates the operational journal, and no transaction type for operational journal exists, Workday applies the *Accounting Journal* transaction type configuration on the View Operational Journal task.
Customer Invoice	If you require a worktag type on the customer invoice header, you can make that worktag type optional on the customer invoice line. If you make a worktag type optional on the customer invoice header, you can require it on the customer invoice line. If you use worktag balancing, require the balancing worktag type on the customer invoice header or customer invoice line.
Project	When users select project-related worktags on transactions, Workday displays the configured worktag types (project, project phase, or project task). If you require the *Project Task* worktag type, exclude *Project* and *Phase* worktag types because Workday determines project and phase from the project task. Workday determines the project from the project phase. If you require the *Project Phase*

Option	Description
	worktag type, select the *Project Task* worktag type and exclude the *Project* worktag type.

3. Select a transaction and click Edit Worktag Usage to set up Primary Worktag Types and Additional Worktag Types.
4. As you complete the task, consider:

Option	Description
Worktag Type	You can define up to 10 primary worktag types per transaction. Workday defines the worktag types that are available. A worktag type can be primary or additional, not both.
Disallow Inactive Values	Select for Workday to remove inactive values automatically from prompts and prompt searches, even if the worktag was active as of the transaction date. The options you select aren't applicable to web services.
Required	Set up worktag types as required. For required worktag types on transactions with line splits, enter worktags on the split instead of the line.

Result

Workday uses your worktag usage settings to control which worktag types are:

- Available.
- Individual fields.
- Required.

Related Information
Tasks
Steps: Set Up and Update Journal Sources
Configure Worktag Balancing for the Tenant

Convert Basic Worktags to Full Definitions

Prerequisites

For projects, create a project hierarchy and submit it for approval.

Security: 1 or more of:

- *Customer Event* business process security policy in the Customers functional area.
- *Set Up: Endowments* domain in the Endowment Accounting functional area.
- *Set Up: Grants* domain in the Grants Management functional area.
- *Create Project* business process security policy in the Projects functional area.
- *Set Up: Sales Item* domain in the Customer Accounts functional area.
- Supplier Event business process security policy in the Suppliers functional area.

Context

You can convert basic worktag definitions to full definitions for:

- Customers.
- Gifts.
- Grants.
- Projects.
- Sales items.
- Suppliers.

Workday converts the basic definitions to full worktag definitions and carries your history forward. Use the full worktag definitions of customers, sales items, suppliers, projects, grants, and gifts in your financial transactions.

Example: You're using contingent workers in HCM and have defined basic supplier worktags. When you implement Workday Financial Management, you can convert the basic supplier worktags to full definition worktags with supplier account details and still retain history to where you used those suppliers when they were only basic worktags.

Steps

1. For an object that you want to convert to full definition worktags:
    - Select Customer > Create Customer from Customer Worktag from a basic customer's related actions menu.
    - Select Gift > Create Gift from Basic Gift from the related actions menu of a gift.
    - Access the Create Grant from Grant Worktag task.
    - Access the Create Project from Project Worktag task.
    - Access the Edit Sales Item task.
    - Select Supplier > Create Supplier from Supplier Worktag from a supplier's related actions menu.
2. Select the worktag you want to convert.
3. Fully define the object.
4. (Optional) For basic projects or suppliers, Submit for review and approval.
   Workday launches the appropriate business process.
5. (Optional) Configure Related Worktags on page 1354.

   For grants, specify any related worktags.

Related Information

Tasks

Create Project Hierarchies

Create Projects

Create Suppliers

Create Customers

Create Sales Items

Concept: Worktags

Worktags are keywords that you can assign to transactions and supporting data to make their business purposes clear and establish common relationships through classification. Classification gives you a multidimensional view of your business operations that you can act upon. You can find information easier, filter searches down to focused results, and analyze information in aggregated and summarized reporting by business dimension.

Example: When workers fill out purchase orders or expense reports, they can assign worktags such as the department and the project it's for.

Kinds of Worktags

Workday provides several kinds of worktags to meet your different business needs.

Kind	Description
Delivered worktag	Predefined worktag types and values with preset transaction availability.
Custom worktags	15 delivered worktags with configurable names and values. Each custom worktag associates the *Worktag Usage* with financial, human resource, payroll, or time tracking transactions or data.
Custom organization worktag	Definable worktags that you can associate with people or financial transactions. You can: • Automatically populate a custom organization as a worktag into transactions that involve a worker by making the worker a member of the custom organization. • Use custom organizations as worktags to route transactions to specific people based on their role.
Basic worktag	Basic definitions for certain objects when you want to use them as worktags but don't need the complexity of their full definitions. Example: You might use basic worktags for some customers, projects, and suppliers.

Ways to Assign Worktags

You can associate worktags with transactions and supporting data in several ways.

Association Method	Description
Built-in worktag	So essential to the transaction or supporting data that Workday displays them as separate fields. Example: Customer and supplier fields on invoices.
Defaulted worktag	Workday automatically assigns to transactions. You can remove them as necessary. Example: An expense report for a worker automatically includes that worker's assigned organizations as worktags.
User-entered worktag	You can manually select from a list of worktag types relevant to the transaction or supporting data. Example: You can add a cost center to a supplier invoice. Use the Maintain Worktag Usage report to set up worktag types that are: • Allowed. • Required. • Primary (placed in its own field).

Association Method	Description
Related worktag	To ensure that your transactions have the correct worktags, you can relate worktags to other worktags and control their combinations by defining default and allowed values. Then in transactions when workers select the object as a worktag, Workday automatically populates the default value of the related worktags. Workers can select only allowed values based on other worktags that have already been entered.
Related Worktag Defaulting on Web Services	On web services in Inventory, Procurement, and Supplier Accounts in Financials, Workday automatically populates your configured related worktags into a transaction one time.

To make worktag selection easier in transactions, the worktags field displays only the worktag types in use within your tenant.

Validating Worktags

Using the Maintain Worktag Usage and Maintain Related Worktag Usage reports, you can indicate whether specific worktag types or related worktag types are required on a transaction. You can configure allowed values in the related worktags for a worktag to control valid combinations of worktags.

Through custom validations, you can set rules that require specific worktags on a transaction. Example: A custom validation ensures that transactions include both a cost center and region worktag, and that they're a valid combination.

Using the Maintain Custom Validations report, you can create or edit critical errors and warning messages for transactions based on rule conditions that you establish. These rule conditions can involve more than worktags. When your staff performs these transactions, Workday validates them against your conditions.

Inactive Worktags

Inactivating a worktag value doesn't change any historical data or affect preceding transactions. It only affects transactions dated on or after the date that you inactivate it.

For worktags that you use in *Financials* reports and business documents, Workday doesn't display inactive worktag values in worktag prompts. You still have the flexibility to *search* for inactive worktags, and use them as needed.

Both the Maintain Worktag Usage and Maintain Related Worktag Usage reports enable you to configure whether to disallow inactive values for certain organization types. Enabling this option prevents an inactive value from being returned in search. The option in Maintain Worktag Usage controls the search in transactions whereas the option in Maintain Related Worktag Usage controls the search for configuring allowed values.

To restrict workers from using inactive worktags for worktag types that don't support this option at this time, you can create custom validations and business process condition rules to check for transactions with inactive worktag values.

My Worktags Prompt

The *My Worktags* prompt makes selecting worktags from the worktags fields easier for these transactions:

- Requisitions.
- Spend authorizations.
- Expense reports.

- Project timesheets and worksheet.

The prompt, which considers all jobs for the worker, includes worktags for a worker's:

- Organization assignments.
- Location.
- Projects the worker is staffed on.
- Payroll costing allocations.

For payroll costing allocations, the *My Worktags* prompt looks at costing allocations specific to worker or position. Costing allocations include:

- Worker.
- Worker and earning.
- Worker and position.
- Worker, position, and earning.
- Position and earning.

If the worker has split payroll costing allocations, the worktags from each split are available for selection in the *My Worktags* prompt when the worker enters the transaction. Example: When entering an expense report, a worker with costing allocations split across 2 funds can select either one.

The *My Worktags* prompt lists the worktags for the current moment, not worktags based on the date of the transaction, organization assignment, or costing allocation change.

Administrators entering transactions on behalf of a worker see the worktag for the worker, not their own.

Related Information
Concepts
Concept: Validate Worktags REST API
Tasks
Steps: Configure Worktag Balancing for Journals

Reference: Worktag Types

Workday delivers many worktags types that you can use to tag your business transactions and supporting data. For each worktag type, Workday presets where you can use it. You don't have to sort through inapplicable worktag types when selecting a worktag value.

To view details about a worktag type, access the Maintain Worktag Usage report, select a category, and click on a worktag type. The Workday delivered worktag types are:

- Academic Period
- Academic Unit
- Ad Hoc Payee
- Allocation Pool
- Alternate Supplier Contract
- Applicant
- Appropriation
- Bank Account
- Business Unit
- Cash Activity
- Company
- Compensation Basis
- Deduction Recipient
- Donor
- Earning*
- Employee
- Employee Type
- Ethnicity
- Expense Item
- Fund
- Gender
- Gift
- Grant
- Impairment Reason
- Intercompany Affiliate
- Location
- Management Level
- Miscellaneous Payee
- Object Class
- Opportunity
- Pay Component
- Pay Group
- Pay Rate Type
- Payroll City Authority
- Payroll County Authority
- Payroll School District Authority
- Salary Over the Cap Type
- Sales Item
- Spend Category
- Sponsor
- Student
- Student Charge Item
- Student Recruiting Campaign
- Student Recruiting Event
- Supervisory Organization
- Supplier

• Contingent Worker • Contingent Worker Type • Corporate Credit Card Account • Cost Center • Country • Customer • Customer Contract • Custom Organization 1 - 10 • Custom Worktag 1 - 15 • Deduction* • Deduction (Workday owned)*	• Interworktag Affiliate • Investment Pool • Investment Profile • Investor • Is Manager • Is People Manager • Job Category • Job Level • Job Profile • Job Requisition • Lease Expense Recognition • Ledger Account • Loan	• Payroll State Authority • Position • Pre-Hire • Procurement Item • Program • Program of Study • Project** • Project Phase** • Project Task** • Prospect • Receivable Writeoff Reason • Region • Revenue Category • Run Category (Payroll)	• Supplier Contract • Tax Applicability • Tax Authority • Tax Category • Tax Code • Tax Rate • Third Party • Time Type • Withholding Order Case • Worker Type • Work Function • Work Shift

* Earning and Deduction (pay components) are mutually exclusive.

** Project, Project Phase, and Project Task are mutually exclusive.

Collaboration

Activity Stream

Steps: Enable Activity Stream

Context

When you enable activity streams on Workday objects, workers can collaborate with others by viewing, adding, and replying to comments in different areas in Workday.

Steps

1. Edit Domain Security Policies
    a) On the Functional Area prompt, select *System*.
    b) Select Domain Security Policy > Enable from the related actions menu of the *Self-Service: Activity Stream* and *Administer Activity Stream* domain security policies.
    c) Grant View and Modify permissions to security groups for these domains:
        - *Administer Activity Stream*. Permits users to delete any activity stream comment.
        - *Self-Service: Activity Stream*. Permits users to view, add, and delete their own activity stream comments.

2. Access the Edit Tenant Setup - System task.
    a. In the Activity Stream Settings section, select the objects for which you want to enable activity streams from the Selected Objects for Activity Stream prompt.
    b. (Optional) From the Environment(s) prompt, select one or more environments for which you want to enable activity streams.

       Note: These changes take effect after you sign out of Workday and sign in again.

   Security: *Set Up: Tenant Setup - System* domains in the System functional area.

Result

Workers whohave security permissions to the activity stream-enabled object can interact with other workers using the activity stream.

Related Information
Reference
Reference: Edit Tenant Setup - System on page 164

Concept: Activity Stream

An activity stream is a list of activities that occur in certain objects in Workday. These activities include:

- Comments entered into the activity stream.
- Related business process events.
- Related business process comments.

When you enable activity streams for Workday objects, such as *Job Application* and *Organization Goal*, Workday displays the activity stream on the view page of the object.

The stream displays the activities in reverse-chronological order (with the most recent at the top).

Add or Delete a Comment

In activity streams, you can:

- Add a comment by entering content into the text box and clicking Post.
- Delete a comment by clicking the Delete icon (trash can) for that comment. You must have access to the *Administer Activity Stream* domain to delete any comment from activity streams that you can view.

Tag a Person in a Comment

You can tag 1 or more people in activity stream comments by clicking @ next to the comment text box and selecting users from the prompt. Who you can tag in comments depends on the Workday-delivered security requirements for the selected object. People that you don't tag can still view comments in the activity stream if they have view access.

Notifications for Activity Comments

When you tag a person in a comment, they receive a notification:

- On their Notifications page.
- Through the notification channel that is configured for the Activity Comments notification type on the Edit Tenant Setup - Notifications task. Example: When you configure the Activity Comments notification type to use a routing rule that specifies email as a channel, the person tagged in the activity stream receives an email notification. You can also configure SMS as the channel if it is enabled in your tenant.

Notifications include:

- The comment.

- Name of the person who posted the comment.
- Link to the object where the comment occurred.

If you tag a person who doesn't have security access to the object, Workday sends the notification without a link to the object.

Related Information

Reference

Reference: Edit Tenant Setup - Notifications on page 107

Campaigns and Scheduled Distributions

Setup Considerations: Campaigns

Note: We plan to retire Campaigns in a future release. Workday recommends that you use Engagement Builder for greater efficiency and visibility into your engagements. See Setup Considerations: Engagement Builder.

You can use this topic to help make decisions when planning your configuration and use of campaigns. It explains:

- Why to set them up.
- How they fit into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Campaigns are groups of related content, called campaign items, that Workday delivers to target audiences based on a delivery schedule you define.

Business Benefits

Campaigns enable you to configure audience and delivery settings in advance so that Workday delivers your content automatically. You can configure each campaign item to send independently or relative to a previously delivered item.

Use Cases

Workday provides these campaign types, enabling you to create and manage campaigns for different audiences and business objectives:

- Extended Enterprise Learning: Learning administrators can recommend content, such as a training course from their learning catalog, to external learners.
- Learning: Learning administrators can:
  - Promote engagement of a course, lesson, or program.
  - Assign required learning to workers.
  - Configure reminder notifications to send automatically to individuals who don't complete the training by a specified date.
- Surveys: Managers can gain insight about the usefulness of recent workshops by sending surveys to attendees

Questions to Consider

Questions	Considerations
Who do you want to send content to?	You can send survey and learning campaigns to internal audiences, such as: • Entire organizations. • Subsets of workers generated from predefined talent or succession pools. • Saved searches. • Custom reports. When you enable Extended Enterprise Learning in your tenant, you can send learning campaigns to external audiences generated from a saved search or custom report.
How much content do you want to send?	You can include an unlimited number of items in a campaign. Workday recommends using the Create Scheduled Distribution task when you have only 1 piece of content you want to send on a certain date or schedule. Scheduled distributions require less configuration than campaigns. See Concept: Campaigns and Scheduled Distributions.
How long do you want your campaign to run?	If you don't select an end date for your campaign, it continues to run as long as it's scheduled on the Scheduled Campaign Run or Launch / Schedule Campaign tasks. Campaign schedules expire after a calendar year and 5 subsequent run times have elapsed.

Recommendations

- You can simplify your campaign setup by accessing the:
  - Manage Audiences task to enable audiences for 1 or more eligible campaign types.
  - Create Message Template task to create message templates based on notification types you plan to use when you send campaigns.
- Exclude terminated workers from your audience criteria so that they don't receive campaign notifications.
- Workday recommends using the:
  - Schedule Campaign Run task for regularly scheduled campaigns. The Schedule Campaign Run task is optimized to run concurrent campaigns.
  - Launch / Schedule Campaign task for campaigns on ad hoc schedules or large-volume campaigns. A large-volume campaign is one that processes over 100,000 items during a run. To determine if you have a large-volume campaign, multiply the number of audience members by the number of items delivered in the run.
- To avoid delayed notifications and other system processes, contact the Workday Production Readiness team to help you test and prepare for running large-volume campaigns in Production. Examples of large-volume campaigns include campaigns with:
  - Audience sizes of over 100,000 workers.
  - Frequent dynamic audience additions of over 100,000 workers.
  - Over 100 daily scheduled campaigns.

Requirements

On the Edit Tenant Setup - Notifications task, set up notification delivery settings for the notification type you plan to send using campaigns.

Limitations

- All campaigns can contain email and push notifications, but you can't add a survey to a learning campaign or a learning lesson to a survey campaign.
- If you select a Talent Pool as an audience for a campaign, only use static types. Dynamic Talent Pool types don't return an audience.
- You can rescind a Campaign Event business process, but you can't remove a single notification that already delivered.
- The Candidate Engagement functional area requires separate configuration. You can't set up Candidate Engagement Recruiting Campaigns with these tasks:
    - Create Campaign
    - Edit Campaign
    - View Campaign
    - Create Audience
    - Edit Audience
    - View Audience

Tenant Setup

On the Edit Tenant Setup - Notifications task, you can use the:

- Enable Reminders section to enable the ability to create campaign item reminders.
- Notification Delivery Settings section to configure the notification channels and frequency for the notification type that you're using to send campaigns.

Security

You can configure these domains in the System functional area:

Domain	Considerations
Administer Campaigns	Enables you to create, edit, and view campaigns.
Set Up: Campaign Type Categories	Enables you to create campaign categories that you can use to restrict campaign audiences to a specific category.
Set Up: Message Templates	Enables you to create message templates that you can use for campaign item notifications.

Business Processes

Configure the *Campaign Event* business process to perform these actions on campaigns:

- Approve
- Copy
- Create
- Edit
- Rescind
- Submit
- View

Reporting

Reports or Dashboards	Considerations
Campaign Email Analytics By Item report	You can use this report to view analytics for individual campaign items. Example: View how many recipients opened a campaign item.
Campaign Status by Category report	If you specify a category for a campaign, you can use this report to view the status of a campaign. Example: View whether a campaign delivered or is still in progress.
Campaigns dashboard	Use this dashboard to create, edit, and view: • Campaigns. • Campaign audiences. • Campaign categories. • Message templates.

You can use these report data sources to create custom reports:

- Campaigns
- Campaign Item Records

Integrations

You can use these web services with campaigns:

- *Get Campaign Categories*
- *Get Connect Campaigns*
- *Put Campaign Category*
- *Submit Connect Campaign*

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Reference

Reference: Edit Tenant Setup - Notifications on page 107

Workday Community: Support for Your Large Volume Event

Steps: Set Up Campaigns

Context

Note: We plan to retire Campaigns in a future release. Workday recommends that you use Engagement Builder for greater efficiency and visibility into your engagements. See Setup Considerations: Engagement Builder.

You can configure message templates, campaign categories, audiences, and schedule details for a campaign before creating a campaign, enabling you to reuse configurations for multiple campaigns.

Steps

1. (Optional) Create campaign categories.

   See Steps: Create Campaign Categories on page 1370.

2. (Optional) Create Audiences to Use in Collaboration Tasks on page 1371.
3. (Optional) Create a message template to use in a campaign.

   See Steps: Set Up Message Templates on page 252.
4. (Optional) Access the Edit Tenant Setup - Notifications task.

   To enable reminder notifications for campaign items, select the Enable Reminders check box in the Reminder Settings section.

   Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.
5. (Optional) Access the Schedule Campaign Run task.

   Create a tenant-wide campaign schedule in which the start and end date encompasses your campaign start and end date.

   Security: *Schedule: Campaign Runs* domain in the System functional area.
6. Create Campaigns on page 1373.

Related Information

Reference

Reference: Edit Tenant Setup - Notifications on page 107

Steps: Create Campaign Categories

Prerequisites

Note: We plan to retire Campaigns in a future release. Workday recommends that you use Engagement Builder for greater efficiency and visibility into your engagements. See Setup Considerations: Engagement Builder.

Security: *Set Up: Campaign Type Categories* domain in the System functional area.

Context

You can use campaign categories to:

- Compare campaigns using email analytics.
- Group campaigns by organizational topic to analyze their effectiveness.
- Restrict access to campaign types for selected security groups.

Steps

1. Access the Create Campaign Category task.
2. Create Segment-Based Security Groups.
   a. Create a segment-based security group to restrict access to the campaign category.
   b. Grant your security group access to the campaign category security segment associated with your campaign category.
3. Edit Domain Security Policies.
   a. Grant the segment-based security group permissions to the *Administer Campaigns* domain.
   b. Give the segment-based security group access to the campaign category security segment.
4. Edit Business Process Security Policies.

   Configure the security policy for the *Campaign Event* business process and add your security group to it.
5. Activate Pending Security Policy Changes.

Steps: Schedule Worker Communication Notifications

Context

Note: We plan to retire Campaigns in a future release. Workday recommends that you use Engagement Builder for greater efficiency and visibility into your engagements. See Setup Considerations: Engagement Builder.

You can define message and delivery details for worker communications in advance, enabling you to send robust, consistent messages to your audience.

Steps

1. Create Segment-Based Security Groups.

   Grant security groups access to the *Distribution Type* segment.
2. Edit Domain Security Policies.

   Grant your segmented security group access to the *Administer Scheduled Distributions* domain.
3. Access the Edit Tenant Setup - Notifications task.

   On the System tab in the Notification Delivery Settings section, configure notification settings for the Worker Communications notification type.

   Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.
4. (Optional) Create a message template for the notification channels that you want to send the notification through.

   See Steps: Set Up Message Templates on page 252.
5. (Optional) Create Email Templates on page 262.

   Select the *Worker Communications* option from the Email Template Behavior prompt.
6. Schedule a Notification to Send in the Future on page 1375.

   On the Item Details tab, select the *~Worker~ Notifications* option from the Content Type prompt.

Create Audiences to Use in Collaboration Tasks

Prerequisites

Note: We plan to retire Campaigns in a future release. Workday recommends that you use Engagement Builder for greater efficiency and visibility into your engagements. See Setup Considerations: Engagement Builder.

Security: At least 1 of these domains in the System functional area:

- *Administer Campaigns*
- *Administer Scheduled Distributions*

Context

You can create an audience in advance so that you can use and reuse it when you configure audience details for these tasks:

- Create Campaign
- Create Scheduled Distribution

Steps

1. Access the Create Audience task.

2. As you complete the task, consider:

Option	Description
Available for	Select the campaign or distribution type that you want to be able to use the audience for. When you select a campaign type, you can associate a category with the audience so that you can use the audience exclusively with campaigns of the same category.

Type	Select:
	
	• *Custom Report* to use a custom report.
	  ◦ The business object that the custom report data source is based on depends on the campaign or distribution type you select.
	  ◦ When you select a custom report that enables you to set parameters on the report filters, specify the values in the Report Criteria grid.
	  ◦ Indexed data sources aren’t updated in real-time. A change in Workday may not appear in the report until the next indexing cycle. For time-sensitive campaigns, access the Scheduled Future Processes report to find your index refresh times. Schedule your campaign to run after the index process completes to ensure accurate data.
	• *Organization* to use a specific organization, including the associated subordinate organizations, as your audience.
	• *Saved Search* to use an existing saved search.
	• *Succession Pool* or *Talent Pool* to use an existing pool, based on the faceted Find Workers report.
	
	Note: Workday supports only static Talent Pool types. Dynamic Talent Pool types don't return an audience.

Result

When a worker meets the audience requirements for an active campaign or scheduled distribution, Workday sends them the notifications according to the schedule you defined.

Next Steps

Use the Manage Audiences task to deactivate audiences.

Related Information

Concepts

Concept: Finding Workers

Create Campaigns

Prerequisites

Note: We plan to retire Campaigns in a future release. Workday recommends that you use Engagement Builder for greater efficiency and visibility into your engagements. See Setup Considerations: Engagement Builder.

Configure the *Campaign Event* business process and security policy in the System functional area.

Security: *Administer Campaigns* domain in the System functional area.

Context

Campaigns enable you to automate the delivery of content to a target audience. You can send multiple campaign items according to specified schedules so that you don't need to send items manually.

When you want to schedule the delivery of single-item notifications, Workday recommends that you use the Create Scheduled Distribution task instead.

Steps

1. Access the Create Campaign task.
2. As you complete the task, consider:

Option	Description
Audience	Workday displays the audiences that you create using the Create Audience task as options. You can calculate the size of the audience after you create the campaign and before you launch it by clicking Calculate Audience Size on the View Campaigns task.
Exclusion Rule	Workday removes audience members as they become ineligible. If ineligible audience members become eligible again, they're reassigned campaign items. If you clear the Enable dynamic removal and resend option, Workday won't remove audience members that have become ineligible.
Calculated as User	The security profile of the creator determines the users included in the audience based on the search criteria or custom report parameters.
Override Default User	(Optional) Select a worker who has sufficient security access to run the linked custom report that defines the audience. Note: If you select a worker with a security level different than that of the audience creator, Workday might not deliver campaign items to

Option	Description
	all audience members. Workday recommends that the selected worker runs the custom report to confirm access to audience members before running the campaign.

3. Click Add Item.
4. As you complete the task, consider:

Option	Description
Setup	Workday populates the Channels prompt with the channels that you enabled for the notification type your campaign uses on the Edit Tenant Setup - Notifications task.
Message	Click the Insert Tag icon to insert: • Global fields. • Report fields on business objects associated with the source.
Send Date	When there's more than 1 item in your campaign, you can send subsequent campaign items: • On a specific date. • On completion of a specific item, which you can select from the prompt. Note: Workday doesn't send a notification for the next item immediately, but sends it as soon as the campaign runs again. Example: When you set a Learning campaign to run weekly on a Monday, and Lisa completes the first item on a Wednesday, Lisa won't receive the notification for the second item until the next Monday. • Relative to another item in the campaign by a number of days or weeks. Set a Due Date to configure reminder notifications for the item.

5. (Optional) Set up campaign reminder notifications for campaign items that include a due date by clicking Add Reminder on the Items grid.
6. As you complete the task, consider:

Option	Description
Setup	Workday automatically populates the Channels prompt with the channels you enabled for campaign notifications on the Edit Tenant Setup - Notifications task.
Message	From the CC Recipients prompt, select a stakeholder to copy on the reminder, providing

Option	Description
	them insight into the status of an item for a recipient. Copied stakeholders don't receive the notification when you set any email restriction in the General Email Notification Settings section on the Edit Tenant Setup - Notifications task.
Send Date	You can send reminder notifications: • On the due date of the campaign item. • Relative to the due date of the campaign item by days or weeks. • On a recurring schedule by days or weeks, up to 50 times. You can configure up to 3 separate reminders for a campaign item and each can have a different recurrence schedule. Workday doesn't send reminders after the: • Campaign end date. • Maximum number of recurring reminders are sent.

Next Steps
Use the Launch / Schedule Campaign task to launch the campaign. Campaigns launched from this task are excluded from the tenant-wide schedule defined on the Schedule Campaign Run task.
Related Information
Reference
Reference: Edit Tenant Setup - Notifications on page 107

Schedule a Notification to Send in the Future

Prerequisites

Note: We plan to retire Campaigns in a future release. Workday recommends that you use Engagement Builder for greater efficiency and visibility into your engagements. See Setup Considerations: Engagement Builder.

On the Edit Tenant Setup - Notifications task, set up notification delivery settings for the Surveys and Worker Communications notification types.

Security: *Administer Scheduled Distributions* domain in the System functional area.

Context

You can schedule the delivery of a survey or worker notification in advance, saving you time. When you use the Create Scheduled Distribution task to send a notification, you can:

- Select an item of content.
- Select a channel to send the notification through.
- Add a message to the notification.
- Select how often you want to send the notification.
- Review the configurations before submitting.

See Concept: Campaigns and Scheduled Distributions.

Steps

1. Access the Create Scheduled Distribution task.
2. As you complete the Audience tab, consider:

Option	Description
Saved	Select an audience you previously created using the Create Audience task. You can use the security profile of a worker other than the audience creator to use that audience by clicking the Override Default User check box. Note: When you select a worker for whom you don't have security access, Workday doesn't deliver the survey to the audience.
Create New	Enables you to configure details for a new audience.

Type	Select:
	• *Custom Report* to use a custom report.
	    • The business object that the custom report data source is based on depends on the campaign or distribution type you select.
	    • When you select a custom report that enables you to set parameters on the report filters, specify the values in the Report Criteria grid.
	• *Organization* to use a specific organization, including the associated subordinate organizations, as your audience.
	• *Saved Search* to use an existing saved search.

3. As you complete the Setup tab, consider:

Option	Description
Channels	Workday displays the channels you enabled for the notification type on the Edit Tenant Setup - Notifications task.

Related Information

Tasks

Steps: Send Surveys Using Scheduled Distribution on page 1404

Steps: Schedule Worker Communication Notifications on page 1371

Reference

Reference: Edit Tenant Setup - Notifications on page 107

Concept: Campaigns and Scheduled Distributions

Note: We plan to retire Campaigns in a future release. Workday recommends that you use Engagement Builder for greater efficiency and visibility into your engagements. See Setup Considerations: Engagement Builder.

Campaigns and scheduled distributions use Workday notifications to schedule the delivery of content to target audiences.

Campaigns

Campaigns enable you to group multiple items of content (campaign items) into 1 group (a campaign), and deliver each item as an individual notification to target audiences. You can customize how and when campaign audience members receive the notifications by customizing both the campaign and the items within it. Some campaign configuration settings include:

- Item delivery schedule.
- Item due date.
- Notification channel.
- Notification message.
- Target audience.

Scheduled Distributions

Scheduled distributions are similar to campaigns, but require less configuration. Scheduled distributions simplify how you schedule and deliver a single item of content. You can configure a message to accompany the item and send them both to an audience on a specified frequency. You can send only these content types using the Create Scheduled Distribution task:

- Surveys
- Worker Notifications

Campaign and Distribution Types

Campaign and Distribution types can differ in:

- How you can create the target audience.
- The individuals administering them.
- The type of content that you can send.
- The delivery frequencies available.

Example: You can use the:

- *Learning* campaign type to create campaigns that promote courses, lesson content, and notifications to target audiences.
- *Survey* campaign type to create campaigns that promote surveys and notifications.

Launching Campaigns

You can launch campaigns using 1 of these tasks:

Task	Description
Launch / Schedule Campaign	Enables you to launch a single campaign manually. Recommended for ad-hoc schedules or large-volume campaigns. A large-volume campaign is one that processes over 100,000 items during a run. To determine if you have a large-volume campaign, multiply the number of audience

Task	Description
	members by the number of items delivered in the run. Workday displays the most recently calculated audience size on the task so that you can ensure that the campaign you're launching is associated with the correct audience.
Schedule Campaign Run	Enables you to define a tenant-wide schedule that Workday uses to find active campaigns and send associated campaign items to eligible audience members. This schedule applies to any active campaign in your tenant that you don't launch using the Launch / Schedule Campaign task. Recommended for regularly scheduled campaigns. Optimized to run concurrent campaigns. Since you can only select 1 recurrence for a schedule, Workday recommends that you create multiple schedules. Example: You have an active campaign and you configured to send the second campaign item 3 days after the first item. You only set 1 schedule to run weekly on a Monday, and Lisa completes the first item on a Wednesday. Lisa doesn't receive the notification for the second item until the next Monday.

Campaign Item Reminders

You can configure up to 3 reminder notifications for a campaign item. You can specify a unique message, notification channel, and delivery schedule for a reminder.

Reminder notifications have separate delivery schedules from the campaign items that they're associated with. If you change the Run Frequency on the Launch / Schedule Campaign or Schedule Campaign Run tasks, the reminder schedule won't change.

You can send a reminder notification:

Option	Description
On the campaign item due date.	Workday uses the campaign audience member's time zone when you specify a time for Workday to send a reminder notification on the associated campaign item due date.
Relative to the campaign item due date.	You can specify a number of days or weeks before or after a campaign item due date for Workday to send the reminder. Workday uses the campaign audience member's time zone when you specify a time for Workday to send a reminder notification relative to the associated campaign item due date.
On a recurring basis.	The number of recurrences you specify doesn't include the primary reminder. Depending on when the recipient completes the associated campaign

Option	Description
	item, they might receive the maximum number of recurring reminders plus the primary reminder. Example: Betty configures a campaign item with these attributes: • Send Date: 2021-01-01 • Due Date: 2021-01-08 Betty configures a reminder notification for the campaign item with these attributes: • Send primary reminder 6 days before campaign item due date (2021-01-02). • Send recurring reminders daily. • Stop sending reminders after Workday sends a maximum of 3 reminders. When a campaign audience member, Janet, doesn't complete the campaign item by 2021-01-08, Janet receives a total of 4 reminders: 1 primary and 3 recurrences. You can access the Scheduled Future Processes report to edit the recurrence schedule. See Manage Scheduled Future Processes.

You can also create reminder notifications for campaign items in previously created campaigns. Workday sends the reminder notification only to the audience members who receive the campaign item after you add the reminder.

Dashboards

You can add these dashboards to your Home page so that you can create and manage your campaigns and scheduled distributions in 1 place:

- Campaigns
- Connect
- Scheduled Distributions

Example: Administer a Campaign

Note: We plan to retire Campaigns in a future release. Workday recommends that you use Engagement Builder for greater efficiency and visibility into your engagements. See Setup Considerations: Engagement Builder.

This example illustrates how you can:

- Create a campaign to deliver to a target audience.
- Define a campaign schedule.
- Set up reminder notifications to deliver to audience members.

Context

You're a Learning Administrator in the Global Modern Services (GMS) organization. You want to use campaigns to deliver an online training course to all employees in the San Francisco branch. Employees must complete the training course within 2 weeks of receiving it. To encourage participation, you also want to send a reminder notification to audience members who haven't completed the training by the week before the due date.

Prerequisites

- Select the Enable Reminders check box in the Reminders Settings section on the Edit Tenant Setup - Notifications task.
- Create an audience using the Create Audience task and name it *San Francisco Employees*.
- Create a Learning course using the Create Course task and name it *Health & Safety Online Training*.
- Configure the *Campaign Event* business process and security policy in the System functional area.
- Security: *Administer Campaigns* domain in the System functional area.

Steps

1. Access the Schedule Campaign Run task.

   Create a schedule for Workday to scan the campaigns in your tenant, and send eligible campaign items.
2. In the Request Name field, enter: *Andy's Schedule for Campaigns*.
3. In the Schedule section, specify:

Option	Description
Recurrence Type	Select *Recurs Every Weekday*.
Start Time	Select *12:00 PM*.
Time Zone	Select *GMT-08:00 Pacific Time (Los Angeles)*.
Start Date	Enter *01/01/2019*.
End Date	Enter *12/01/2019*.

4. Click OK.
5. Access the Create Campaign task and specify:

Option	Description
Title	Enter *Health & Safety Update 2019*.
Type	Select *Learning Campaign*.
Audience	Select *San Francisco Employees*.
Start Date	Enter *01/02/2019*.
End Date	Enter *01/30/2019*.

6. Click OK.
7. Click Add Item.
8. On the Item Details tab, specify:

Option	Description
Title	Enter *Online Training*.
Content Type	Select *Learning Course*.
Content	Select *Health & Safety Online Training*.

9. Click Next.
10. On the Setup tab, select *Email*.
11. Click Next.
12. On the Message tab, specify:

Option	Description
From Display Name	Enter *Andy Fraiser*.

Option	Description
Reply To	Enter *A.Fraiser@GMS.com*.
Subject	Enter *REQUIRED: Health & Safety Online Training (January 2019)*.
Body	Enter *You have been enrolled in the Health & Safety online training for January 2019. You must complete the attached training within 14 days of receiving it (Monday, January 21st.).* *If you have any questions, please contact Andy Fraiser at A.Fraiser@GMS.com.*

13. On the Send Date tab, specify:

Option	Description
Send on	Enter *01/07/2017*.
Relative Due Date	Select the check box.
Due	Enter *14*.
Days/Weeks Before/After	Select *Days after item is delivered*.

14. Click Next.
15. Click Save.
16. Click Add Reminder.

    Create a reminder notification.
17. On the Reminder Details tab, enter *Online Training Reminder* as the Title.
18. On the Setup tab, select *Email*.
19. Click Next.
20. On the Message tab, specify:

Option	Description
From Display Name	Enter *Andy Fraiser*.
Reply To	Enter *A.Fraiser@GMS.com*.
Subject	Enter *REMINDER: Health & Safety Online Training (Due Today)*.
Body	Enter *You have 1 week left to complete the Health & Safety online training for January 2019. All employees are expected to complete the online training by Monday, January 21st.* *If you have any questions, please contact Andy Fraiser at A.Fraiser@GMS.com.*

21. On the Send Date tab, specify:

Option	Description
Send Reminder	Select *Relative to Due Date*.
Relative Number	Enter *7*.
Days/Weeks Before/After	Select *Days before due date*.
Send Time	Select *8:00 AM*.

22. Click Next.
23. Click Save.
24. Click Submit.

Result

On 2019-01-07, Workday delivers an email notification to the members of the *San Francisco Employees* audience containing information about and access to the Health & Safety Online Training.

Because you configured the campaign schedule to run on weekdays, audience members that haven't completed the Health & Safety Online Training by 2019-01-14 receive a reminder email at 08:00:00 on 2019-01-14.

FAQ: Campaigns

Note: We plan to retire Campaigns in a future release. Workday recommends that you use Engagement Builder for greater efficiency and visibility into your engagements. See Setup Considerations: Engagement Builder.

- What is the difference between the Launch / Schedule Campaign and Schedule Campaign Run tasks?
- What happens if I don't select the Enable dynamic removal and resend option?
- If I change a campaign audience after I sent a campaign, does Workday update the audience size?
- What happens if my campaign has no end date?
- Can I change the due date after a campaign launches?
- Do I need to recreate campaigns each year?
- What time zone does Workday use to send campaign item reminders?
- Do I need to change my reminders if I change how often my campaign runs?
- What happens when I disable reminders in the middle of a campaign?
- I added reminders to campaign items after I already launched a campaign. Will the campaign item reminders deliver?
- Can I change a reminder after a campaign launches?
- How do I identify the last date that a campaign ran?

What is the difference between the Launch / Schedule Campaign and Schedule Campaign Run tasks?	• The Launch / Schedule Campaign task enables you to create an individual schedule for a single campaign. • The Schedule Campaign Run task enables you to create a tenant-wide default schedule for all campaigns. You don't have to launch campaigns manually when you create a schedule on this task.
What happens if I clear the Enable dynamic removal and resend option?	If you clear the Enable dynamic removal and resend option, Workday won't remove audience members that have become ineligible. If the Enable dynamic removal and resend option is selected, Workday removes ineligible audience members; if ineligible audience members become eligible again, they're reassigned campaign items.
If I change a campaign audience after I sent a campaign, does Workday update the audience size?	Yes. Workday reevaluates the members of the audience every time the campaign runs.

What happens if my campaign has no end date?	Your campaign continues to run as long as it's scheduled on the Schedule Campaign Run or Launch / Schedule Campaign tasks.
Can I change the due date after a campaign launches?	Yes. You can change the due date after a campaign launches, but the effects of the change differ depending on the state of the item per audience member. • For unassigned items, the updated due date takes effect when the item is assigned. • For assigned items, the updated due date takes effect for any remaining recurrences of previously sent reminders or for any remaining unsent reminders. Reminders for which all recurrences have been sent aren't sent again.
Do I need to recreate campaigns each year?	You don't need to recreate your campaign, but you do need to recreate your campaign schedule. Campaign schedules expire after a calendar year and 5 subsequent run times have elapsed.
What time zone does Workday use to send campaign item reminders?	Workday sends campaign item reminders using the time zone of the recipient.
Do I need to change my reminders if I change how often my campaign runs?	No. Reminder schedules don't change if you change the Run Frequency on the Launch / Schedule Campaign or Schedule Campaign Run tasks.
What happens when I disable reminders in the middle of a campaign?	Workday accumulates reminders when you disable them. When you reenable reminders, Workday delivers the accumulated remaining reminders based on the delivery schedule you defined. Example: Betty Liu configured a reminder notification to recur 10 times. An audience member (Olivia Price) receives the first 2 reminder recurrences. Betty then disabled reminders for 30 days. When Betty reenables reminders, Olivia receives the remaining 8 reminders based on the schedule Betty defined unless: • Olivia already completed the associated campaign item. • The audience no longer includes Olivia. • The campaign end date has passed.
I added reminders to campaign items after I already launched a campaign. Will the campaign item reminders deliver?	Yes. Reminders deliver to audience members if they haven't received the item yet. However, you can't send reminders for campaign items that have already been delivered.
Can I change a reminder after a campaign launches?	Yes. You can use the Edit Campaign task to change a reminder in a launched campaign. If you're changing message content or channels, your

	changes will take effect for any unsent reminders. Your changes don't affect delivered reminders.
How do I identify the last date that a campaign ran?	You can identify the last date that a campaign ran by accessing the Process Monitor report. You can also use the Campaign Status by Category report to view the status of your campaign.

Engagement Builder

Setup Considerations: Engagement Builder

You can use this topic to help make decisions when planning your configuration and use of Engagement Builder. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Engagements are collections of engagement items, including messages and learning content, that Workday delivers to target audiences based on a delivery schedule that you define. Engagement Builder is a redesigned version of Campaigns that enables greater control and visibility into your engagements and audience interactions.

Business Benefits

Engagements enable you to configure audience and delivery settings in advance so that Workday delivers your content automatically. You can configure each engagement item to send independently or relative to a previously delivered item.

Additionally, Engagement Builder provides:

- A centralized dashboard to create and manage engagements.
- Automatic scheduling for engagement items.
- The ability to run engagements using Integration System User (ISU) accounts. See Create an Integration System User (ISU) for Engagements on page 1391.

Engagement Builder also uses Audience Builder, which provides greater flexibility in building complex audiences. See Create an Audience on page 1388.

Use Cases

Engagement Builder enables you to use the Learning and Extended Enterprise Learning engagement types to:

- Ensure regulatory compliance by assigning required learning content, such as annual certifications or safety training.
- Support professional development by assigning nonrequired learning content, such as supplemental courses or programs.
- Improve completion rates by configuring automated reminders for individuals who have not completed learning content by a specified date.

Questions to Consider

Questions	Considerations
How do you want to organize your engagements?	You can create custom categories to group your engagements. You can also use categories to restrict engagement management access to certain security groups.
How much content do you want to send?	You can include an unlimited number of items in an engagement.
How much flexibility do you have within an engagement?	You can combine required and nonrequired learning content in a single engagement.
How long do you want your engagement to run?	If you don't select an end date for your engagement, it continues to run as long as it's scheduled. Engagements attempt to run 4 times each day. You can view the last and next run times on the Engagement Builder report.
How long should your audience have to complete the assignment?	You can: • Use the engagement's end date as the due date for learning content. • Set a relative due date up to 999 days after the assignment date.

Requirements

Access to 1 of these report data sources (RDS):

- All Workers for Pre-Hires
- Extended Enterprise Learners
- Indexed: All Workers
- Workers for HCM Reporting

Recommendations

- For best performance when using Audience Builder, use indexed data sources when creating audiences. Nonindexed data sources can lead to long report run times and may impact the performance of your frequently scheduled engagements.
- Contact the Workday Production Readiness team to help you test and prepare for running large volume engagements in Production. See Community: Services Performance Center. Examples of large volume engagements include:
  - Over 1,000,000 members in a single audience.
  - Over 1,000,000 items to be processed in Engagement Builder. For example, 6 new engagements with 50,000 audience members, 2 Learning assignments, and 2 reminders each would require Workday to process 1,200,000 items total.

Tenant Setup

No impact.

Security

Domain	Considerations
Administer Audience domain in the Learning Core and System functional areas.	Enables you to create and manage audiences.
Administer Campaigns domain in the Learning Core and System functional areas.	Enables you to create and manage engagements.
Indexed Data Source: Workers domain in the Staffing functional area.	Enables you to access indexed report data for calculating audiences based on worker data.
Manage: Extended Enterprise in the Extended Enterprise for Learning functional area.	Enables extended enterprise learning administrators to manage affiliations, job profiles, and dashboard access.
Message Builder domain in the System functional area.	Enables you to create messages and message templates. See Steps: Set Up Message Builder on page 304 and Create Engagement Message Templates on page 1393.
Worker Data: Contingent Worker Assignment Details in the Staffing functional area.	Enables you to access data required when including contingent workers in your audience definition.
Worker Data: Current Job Profile Information in the Staffing functional area.	Enables you to access job profile data for audience filtering.
Worker Data: Current Staffing Information domain in the Staffing functional area.	Enables you to view and modify workers' information for audience filtering.

Business Process

Business Processes	Considerations
Campaign Event	You can use this business process to perform these actions on engagements: • Approve • Cancel • Deny • Initiate • Rescind You must add security groups to the Engagement Builder initiating action of this business process to grant them access to engagements.

Reporting

Reports or Dashboards	Considerations
All Workers for Pre-Hires Extended Enterprise Learners Indexed: All Workers Workers for HCM Reporting	You can use these RDSs to create audiences using the Audience Builder dashboard.

Reports or Dashboards	Considerations
Audience Builder	You can use this dashboard to create and manage complex audiences.
Engagement Builder	You can use this report to create and manage engagements.

Integrations

Integrations or Web Services	Considerations
Get Audience Builder (Web Service)	Retrieves information for audiences specified in the Audience Builder dashboard.
Put Audience Builder (Web Service)	Creates or updates an audience used in the Audience Builder dashboard.
Get Engagement Builder (Web Service)	Retrieves information for engagements used in the Engagement Builder report.
Submit Engagement Builder (Web Service)	Creates or updates an engagement used in the Engagement Builder report. See Concept: Submit Engagement Builder EIB.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Concepts

Concept: Message Builder on page 304

Use Case: Create Engagements

Tasks

Create an Integration System User (ISU) for Engagements on page 1391

Examples

2025R1 Feature Release Note: Engagement Builder

Steps: Create Engagement Categories

Prerequisites

Security: *Set Up: Campaign Type Categories* domain in the System functional area.

Context

You can use engagement categories to:

- Group engagements by organizational topic.
- Restrict access to engagement types for selected admin security groups.

Steps

1. Access the Create Campaign Category task.

2. Create Segment-Based Security Groups.
    a. Create a segment-based security group to restrict access to the engagement category.
    b. Grant your security group access to the engagement category security segment associated with your engagement category.
3. Edit Domain Security Policies.
    a. Grant the segment-based security group permissions to the *Administer Campaigns* domain.
    b. Give the segment-based security group access to the engagement category security segment.
4. Edit Business Process Security Policies.

    Configure the security policy for the *Campaign Event* business process and add your security group to it.
5. Activate Pending Security Policy Changes.

Result

You can select your engagement category from the Engagement Category field on the Engagement Details prompt when creating a new engagement.

Related Information

Tasks

Create an Engagement on page 1390

Create an Audience

Prerequisites

- Configure the Campaign Event business process under the initiating action Engagement Builder to add relevant security groups.
- Security:
    - 1 of these domains in the Learning Core and System functional areas:
        - *Administer Audience*
        - *Administer Campaigns*
    - 1 of these domains in the Staffing functional area:
        - *Self-Service: Current Staffing Information*
        - *Worker Data: Public Worker Reports*
    - View access to these domains in the System functional area
        - *Custom Report Creation*
        - *Custom Field Management*

Context

Audience Builder improves the way teams target recipients to distribute content and enables you to:

- Build requirements for an audience using data source filters and related business objects.
- Create conditions that apply to a segment of the audience.
- Create conditions that apply to the entire audience.
- Preview an audience.

Steps

1. Access the Audience Builder dashboard.
2. Click Create Audience.

3. As you complete the Create Audience prompt, consider:

Option	Description
Data Source	You can select these report data sources: • *All Workers for Pre-Hires* • *Extended Enterprise Learners* • *Indexed: All Workers* • *Workers for HCM Reporting* Note: Indexed data sources aren't updated in real-time. A change in Workday may not appear in the report until the next indexing cycle. Engagement Builder automatically evaluates audiences four times per day, which ensures audiences are updated regularly.
Data Source Filter	The selected data source determines the filters available for building your audience.

4. As you complete the Audience Criteria prompt, consider:

Option	Description
Conditions	Add a condition that applies to your entire audience. You can create as many conditions as needed for your audience. If creating an audience using related business objects, select the data source and 1 of these operators: • *Meets subfilter* • *Doesn't meet subfilter* See Concept: Defining Audiences.
Segments	Create an audience segment with a specific set of conditions. You can create multiple segments with different sets of conditions. Each segment is joined together by an OR, meaning every audience member meets all conditions included in at least 1 of the segments. If creating an audience using related business objects, select the data source and 1 of these operators: • *Meets subfilter* • *Doesn't meet subfilter* See Concept: Defining Audiences.

5. (Optional) From the More Actions menu on the audience segment, select Edit Segment to name the segment.

6. (Optional) Click Preview Audience to view all audience members that match your audience criteria.

   Note: Preview Audience is based on your security permissions. The audience count may differ if your permissions don't match those of the engagement's Integration System User (ISU). See Create an Integration System User (ISU) for Engagements on page 1391.

   To add columns to the preview window, click Select Columns and enter up to 20 additional columns using the search field.
7. (Optional) On the Individual Exceptions section, click:
   - Add a person to add a specific person to your audience.
   - Remove a person to remove a specific person from your audience.
8. Click Save.

Result

Workday saves your audience. You can now use it in an engagement or export it to Worksheets.

Next Steps

- Use your audience to create an engagement. See Create an Engagement.
- Export your audience to Worksheets. See Set Up Worksheets.

Related Information

Concepts

Concept: Custom Reports as Audience Source on page 1395

Concept: Defining Audiences on page 1396

Tasks

Create an Integration System User (ISU) for Engagements on page 1391

Create an Engagement

Prerequisites

- Set Up Security for Engagement Builder on page 1394.
- Steps: Set Up Message Builder on page 304.
- Create Engagement Message Templates on page 1393.
- Create an audience. Configure your audience using one of these methods:
  - Audience Builder. SeeCreate an Audience on page 1388.
  - Custom report. See Concept: Custom Reports as Audience Source on page 1395.

Context

You can use the Engagement Builder report to create and manage Extended Enterprise Learning and Learning engagements.

For a use case related to this topic, see ../../../use-case-library/use-case--creating-engagements.dita in the Use Case Library.

Steps

1. Access the Engagement Builder report.
2. Click Create Engagement and enter your engagement details.

   Select the Enable dynamic removal and resend check box to remove members that no longer fit the audience criteria.

   Click Done.

3. Click Add Audience.

   Select *Audience Builder* or *Custom Report Audience*.

   Select your audience or custom report.

   Click Done.
4. (Optional) To create a default message for all of your engagements, click Add Default Message.

   Select a Message Template.

   Select a Notification Template (Email).

   Enter your message details.

   Click Done.
5. Click Add Item > Learning.

   Enter your engagement item details.

   To assign a required learning, select Required Content.

   Select Due on engagement end date to use the engagement's end date as the learning's due date or select Add due date to set a due date relative to the assignment date.

   Click Done.
6. (Optional) Add a message to your engagement item:
   - Select Add Custom Message to create a custom message for your engagement item.
     a. Select a Message Template.
     b. Select a Notification Template (Email).
     c. Enter your message details.
     d. Click Done.
   - Select Apply Default Message to add the default message to your engagement item.
7. (Optional) If your engagement item has a due date, click Reminder to add a reminder.
   a) Enter your reminder details. You can add 6 reminders per engagement item.
   b) Select a Message Template.
   c) Select a Notification Template (Email).
   d) Enter your message details.
   e) Click Done.
8. Click Submit.

Result

Engagements display in the Engagement Builder report.

Next Steps

See Concept: Manage an Engagement on page 1397.

Related Information

Concepts

Concept: Manage an Engagement on page 1397

Concept: Message Builder on page 304

Tasks

Steps: Create Engagement Categories on page 1387

Create an Integration System User (ISU) for Engagements

Prerequisites

Security:

- *Administer Campaigns* domain in the Learning Core and System functional areas.

- *Indexed Data Source: Workers* domain in the Staffing functional area.
- *Manage: Extended Enterprise* domain in the Extended Enterprise for Learning functional area.

Note:

Engagement Builder runs using an ISU for security evaluation, which relies on data source and report field access to resolve the targeted audience.

For example, if your engagement targets an audience that uses a report field containing sensitive information, the Integration System Security Group (ISSG) must have the required security permissions to enable the ISU to access that field. If the ISU does not have appropriate access, the audience won't resolve and the engagement won't run.

It's crucial to confirm that your ISSG is configured to access all necessary report fields and security domains. Regularly review and update your ISSG configuration to include access to any new report fields. If your ISSG does not have the required access, an error is logged in the engagement run log. See Concept: Manage an Engagement.

The ISU's time zone doesn't affect the timing of audience evaluation.

Context

Workday uses ISUs to run engagements. You can use the same ISU and ISSG for each engagement.

Steps

1. Access the Create Integration System User task to create an ISU.
2. Access the Create Security Group task.

   As you complete the task, consider:

Field	Value
Type of Tenanted Security Group	Select *Integration System Security Group (Unconstrained)*.
Name	Workday recommends using *Campeng System Security Group*.

   On the Edit Integration System Security Group (Unconstrained) section, enter the name of your ISU in the Integration System Users field.
3. Access the Maintain Permissions for Security Group task.

   Select *Campeng System Security Group* on the Source Security Group prompt.

   As you complete the task, consider:

View/Modify Access	Domain Security Policy
Get and Put	*Administer Campaigns*
View and Modify	*Administer Campaigns*
Get and Put	*Indexed Data Source: Workers*
View and Modify	*Indexed Data Source: Workers*
Get and Put	*Manage: Extended Enterprise*
View and Modify	*Manage: Extended Enterprise*
View Only	*Worker Data: Contingent Worker Assignment Details* *Worker Data: Current Job Profile Information*

View/Modify Access	Domain Security Policy
	Worker Data: Current Staffing Information

4. Activate Pending Security Policy Changes.

Result

Workday assigns your ISU to the *Campeng System Security Group* ISSG. You can select the ISU to run your engagement.

Related Information
Concepts

Setup Considerations: Engagement Builder on page 1384

Tasks

Create an Audience on page 1388

Create Engagement Message Templates

Prerequisites

Steps: Set Up Message Builder on page 304.

Context

You can create templates for your engagement items and reminders that suit your business needs. Example: You create a template with your company logo, fonts, and social media links. You then add a customized message to your engagement item.

Steps

1. Create and Activate Notification Templates.

   Create and activate a notification template for engagements using your company's branding.

   Once you've published the notification template, select the *Learning Campaigns* or *Extended Enterprise Campaigns* notification category on the Template Details panel.
2. On the Create Message Builder Template task, create a message template and add your message content.
   a. As you complete the template, consider:

Option	Description
Notification Category	Select the notification category that corresponds to your notification template.
Channel(s)	You can create templates for these channels: • Email • Mobile Push

Option	Description
Preview Notification Template	Select the notification template that you've created.

b. As you draft your message template, consider:

Option	Description
From Display Name	Select a name that your message displays to your audience.
Reply To	Configure the reply-to email address. You can enter an email address different from Sent From.
Insert Data Field	Select a data field to add to the subject or body of the message template. Example: Select *Worker* to display the recipient's name in the body of the message template.
Translations	Workday automatically populates the base language based on the preferred locale. On the Languages prompt, you can select: • A different base language. • Additional languages.

Result

Workday enables you to select notification and message templates for your engagements.

Next Steps

You can manage your message templates after you publish them:

- To view and edit your existing message templates, as well as create new templates, access the Message Builder Template Dashboard report.
- To edit a specific message template, access the Edit Message Builder Template task.

Note: When you add a message template to an engagement item, Workday creates a static copy of the template at the moment you apply it to an engagement. This prevents changes to the message template from affecting your active engagements.

You can also manage your notification templates after you publish them:

- To view and edit notification types for your existing notification templates, access the Maintain Notification Templates task.
- To edit a specific notification template, click Edit or Set Category on your published notification template.

Related Information
Concepts
Concept: Message Builder on page 304

Set Up Security for Engagement Builder

Prerequisites

- Create an Integration System User (ISU) for Engagements.

- Engagement Builder requires access to 1 of these report data sources (RDS):
    - All Workers for Pre-Hires
    - Extended Enterprise Learners
    - Indexed: All Workers
    - Workers for HCM Reporting

Context

You can use the Engagement Builder report to create and manage Extended Enterprise Learning and Learning engagements.

Steps

1. Edit Domain Security Policies.

   Set up the *Administer Campaigns* domain in the Learning Core and System functional areas.

   In the Report/Task Permission grid, select the View and Modify check boxes for your security groups.
2. Access the Edit Business Process Security Policy task for the *Campaign Event* business process.

   Add security groups that best fit your organization to the *Engagement Builder* Initiating Action in the Who Can Start the Business Process section.
3. Activate Pending Security Policy Changes.

Next Steps

Create an Engagement.

Concept: Custom Reports as Audience Source

You can use custom reports as an audience source in Engagement Builder, enabling you to:

- Reuse existing custom reports, eliminating the need to recreate these reports in Audience Builder.
- Create more specific audiences by using the advanced capabilities of custom reports, such as comparing audience criteria to a dynamic date field or creating a static audience list via a comma-separated list of IDs.

Requirements for Custom Reports

To use an existing custom report as an audience source in Engagement Builder, ensure the report meets these criteria:

- It's an Advanced custom report type.
- It's enabled for web service.
- It’s shared with your Integration System User (ISU).
- It includes default prompts in the Prompts section. Select Populate Undefined Prompt Defaults to add default prompts. You don’t have to provide a Default Value.

You can update existing reports using the Edit Custom Report task or create a new qualifying report using the Create Custom Report task.

Limitations

Unlike audiences created with Audience Builder, you can't preview your audience when using a custom report as an audience source. To validate the workers included in a custom report audience, you must run the custom report directly.

Related Information

Tasks

Create an Audience on page 1388

Concept: Defining Audiences

Audience Eligibility

When a worker's core attributes change, the Workday processes this event by removing the worker from the audience and then immediately re-adding them to the audience, if they still meet audience eligibility criteria.

Data Source Filters

Data source filters enable you to apply specific criteria to your primary data source when defining an audience, which provides granular control and improved performance when creating your audience.

The data source you select determines the available fields and the target population for your audience.

Related Business Objects and Operators

Related business objects allow access to fields from a different business object that are linked to the primary business object. See Concept: Business Objects, Data Sources, and Fields.

In Audience Builder, you can use related business objects to query and filter audience data across multiple, interconnected business objects. For example, if you're using Worker as your primary business object and it has the multi-instance *Dependents* field, you can access fields from the Dependent business object in Audience Builder.

To display the Subfilter button to use a related business object when building an audience, you must select a related business object and 1 of these operators on the Audience Criteria prompt:

Operator	Description
Meets subfilter	An operator that includes workers if they have at least 1 related item that matches your subfilter criteria.
Doesn't meet subfilter	An operator that includes workers if they do not have related items that matches your subfilter criteria

Talent Pools

To use a talent pool as an audience, you can create a condition using a Talent Pool field. For example, to create an audience of emerging leaders, select these values in the Conditions grid on the Audience Criteria prompt:

Field	Operator	Value
Talent Pools	*In*	*Emerging Leaders*

Ensure you and your Integration System User (ISU) have View access to your talent pool. See Create an Integration System User (ISU) for Engagements on page 1391.

Related Information

Tasks

Create an Audience on page 1388

Concept: Engagement Reminders

If your engagement item has a due date, you can configure reminders to send to recipients to encourage timely assignment completion.

Reminders are highly configurable. You can:

- Add personalized messages and templates to your reminders. See Create Engagement Message Templates on page 1393.
- Create up to 6 reminders per engagement item.
- Schedule reminders relative to the engagement item due date. For example, 3 days before the due date.

Workday sends reminders around 8 AM in the recipient's time zone. While the job runs hourly, recipients in time zones with 30-minute or 45-minute offsets from the standard hourly differences might receive the notification up to 45 minutes after 8 AM.

Workday doesn't send reminders to users who have completed their assignments.

Impact of Configuration Changes on Reminders

If you change a future engagement item due date or reminder recurrence, Workday detects and corrects reminder triggers in the next engagement run. Workday also dynamically updates reminders for engagement items when you reset a due date using the Reset Learning Due Dates task.

For example, if you configure a reminder to send 3 days before the due date but then later postpone the engagement item's due date by a week, Workday reschedules the reminder to send 3 days before the new due date. Similarly, if you configure a reminder to send weekly, but then later update it to send daily, Workday discontinues the weekly reminder and creates a daily reminder.

You can also add reminders to an engagement that is already in progress. Workday sends these new reminders as scheduled, as long as the send date falls within the remaining duration of the engagement.

Note: Workday recommends creating a new reminder recurrence rather than editing a delivered reminder.

Concept: Manage an Engagement

Workday enables these options for managing your engagements.

Option	Description
Duplicate an engagement	To copy an engagement, select Duplicate from the More Actions menu.
Run an engagement now	Workday sends engagement items 4 times each day. You can view the last and next run times on the Engagement Builder report. To run an engagement as soon as possible, select Run Now from the More Actions menu. Workday moves the selected engagement to the front of the queue for the next run.
Send a message	You can create a conditionally scheduled message as part of your engagement without assigning a learning course. To send a message independent of a learning course, click Add Item > Message.
Suspend an engagement	To suspend an engagement, select Suspend Engagement from the More Actions menu.

Option	Description
	Workday suspends engagement items until you select Resume Engagement from the More Actions menu. If you suspend an engagement, the engagement completes its run but won't run again. If the end date for your suspended engagement has not passed, reminders are still sent for suspended engagements and for learners with existing in-progress assignments.
View engagement run logs	To view your engagement run logs, select View Run Logs from the More Actions menu. Click the number in the Errors and Warnings column to view details about the error or warning.

Related Information
Tasks
Create an Engagement on page 1390

Surveys

Setup Considerations: Surveys

You can use this topic to help make decisions when planning your configuration and use of the Surveys feature in Workday. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Surveys in Workday enable you to gather meaningful insights from your workforce using survey forms.

Business Benefits

With surveys you can:

- Create campaigns that deliver surveys to target audiences, including supervisory organizations and individuals, optimizing workforce engagement.
- Distribute surveys through campaign and distribution frameworks.
- Get rapid feedback for a better understanding of the employee experience and to gauge the effectiveness of newly implemented business strategies.
- Schedule survey notifications for respondents on a daily, weekly, or monthly basis.

Use Cases

You can:

- Create, launch, and take surveys using desktop and mobile applications.

- Create and distribute company-wide employee pulse surveys.
- Gather feedback on employee programs and workplace compensation and benefits.
- Add surveys to digital courses in Workday Learning to test learning comprehension.
- Set a specific date and time for surveys to launch and close.
- Dispatch survey notifications through email, push notifications, and Workday notifications.
- Edit a launched survey to remove specific workers.

Questions to Consider

Questions	Considerations
When do you want to use a survey instead of a questionnaire?	You can use a questionnaire as a step in the business process to gather information relevant to that business process. Surveys are independent of the business process framework. You can create surveys for large-scale distribution or distribute to a specific individual or select organizations using a survey link.
Do you want survey recipients to be able to answer a survey more than once?	You can configure, at the survey level, whether recipients can respond multiple times. When you enable multiple responses, Workday saves all responses, not just the last response.
Do you want to restrict survey access to organizations or individuals?	You can restrict survey access using the Send to specific organizations and/or individuals option. You can send surveys without restrictions using the Send via link option.
Do you need to translate your surveys to other languages?	Surveys require manual translation. You can use the Translate Business Object report to translate survey contents manually. You can also use the Put Translatable Tenant Data Public (Web Service) web service when you have multiple surveys to translate.

Recommendations

You can simplify the delivery of surveys by accessing the:

- Find Workers report to define the audience for the survey by creating a saved faceted search.
- Create Campaign task to add the Surveys item type to define the audience, notification channels, message, and sent date of survey campaigns.
- Create Scheduled Distribution task to define the distribution frequency and schedule of surveys.
- Segment-based security groups for surveys to restrict access to specific user groups.

Requirements

To use a survey in a campaign, you must first save it as a draft by selecting Save for Later.

Limitations

With survey functionality, you can't:

- Anonymize user responses.
- Receive additional responses once a survey closes.

- Recover deleted surveys.
- View surveys in proxy mode.
- Include surveys on the To Do step of a business process, but you can add a survey URL on the To Do step.

Tenant Setup

You can configure tenant-wide configurations for the Surveys notification type on the Edit Tenant Setup - Notifications task.

Security

These domains in the System functional area:

Domains	Considerations
Create and Manage Surveys	Enables you to create, edit, copy, view, launch, close, and cancel surveys.
Manage Surveys	Enables you to view, launch, close, and cancel surveys.
Questionnaire Creation and Distribution	Enables you to configure the Survey Home dashboard.
Questionnaire Results	Enables you to access all tasks and reports that provide results of a questionnaire or survey.
Self-Service: Take Surveys	Enables you to access and respond to surveys.

Business Processes

No impact.

Reporting

Reports	Considerations
Survey Home	You can use this report to manage and create surveys.
Survey Responses	You can configure segmented security on this report to restrict survey responses access to specific users for select questions or for all questions in a survey. For more information, see Steps: Set Up Survey Notifications and Campaigns on page 1403 and Steps: Send Surveys Using Scheduled Distribution on page 1404.

Integrations

No impact.

Connections and Touchpoints

Surveys interact with these other areas in Workday:

Feature	Considerations
Workday Prism Analytics	Include survey response data with external data sets in Workday Prism Analytics for advanced reporting.
Campaigns	Include to create survey campaign and customize how and when respondents receive notifications to take surveys.
Scheduled Distribution	Include to schedule the distribution of surveys to an audience on a specified frequency.
Workday Learning	Include surveys in Workday Learning to gain course feedback and test the comprehension of learners.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Create and Send Surveys

Prerequisites

Configure these security domains in the System functional area:

- *Create and Manage Surveys*
- *Manage Surveys*
- *Questionnaire Creation and Distribution*
- *Questionnaire Results*
- *Self-Service: Take Surveys*

Enable survey notifications in Edit Tenant Setup - Notifications.

Context

You can create and send surveys for respondents to complete on their browsers or the Workday mobile app.

You can create a test or quiz by using single-select and multiselect questions and assigning scores to the possible answers. Workday doesn't provide a check box for single-select questions to designate a specific answer as being correct. You can assign a higher numeric score to designate a correct answer. Example: You can set up the score field so that answer choice B out of A, B, C, and D is correct. To set answer B as the correct answer, assign a positive number of points to answer B and assign zero points to answers A, C, and D.

Steps

1. Access the Create Survey task.
2. (Optional) As you complete the Survey Details tab, consider:

Option	Description
Instructional Text	Enter survey instructions that display above the first question.
Limited to 1 Response	Select to prevent responders from taking the survey multiple times.

3. As you complete the Questions tab, consider:

Option	Description
(Multi-Select) Checkbox	Enter up to 10 possible answers. Specify the maximum number of answers respondents can select. You can specify a numeric score value for each response.
(Multi-Select) Pill	Enter up to 10 possible answers. Each answer can have a maximum of 25 characters. Specify the maximum number of answers respondents can select. You can specify a numeric score value for each response.
(Single-Select) Dropdown	Enter up to 99 possible answers. Respondents can select 1 answer. You can specify a numeric score value for each of the responses.
(Single-Select) Radio Button	Enter up to 10 possible answers. Respondents can select 1 answer. You can also specify a numeric score value for each of the responses.
Date	Create a question where the respondent selects a date.
Number	Create a question where the respondent enters a number. The Number question type only accepts positive whole numbers greater than zero.
Text	Create a question where the respondent can enter free-form answers.

   Once you create more than 1 question, you can drag, and drop them in your survey to reorder them.
4. (Optional) Click Preview to view a test version of the survey.

   Workday displays the Preview button for named accounts only. Workday doesn't display the Preview button for administrative accounts.
5. Click Next to send the survey, or Save for Later to keep it in *Draft* status.

   You can share surveys that are in *Draft* status. To use the survey in a campaign or to send it using scheduled distribution, select Save for Later.
6. (Optional) On the Survey Home report, click Share to share a draft survey with other workers so they can edit or launch the survey.

   - Select Edit and Manage to enable workers to view, edit, copy, share, or launch the survey.
   - Select Manage Only to enable workers to view and launch the survey only.

   You can revoke permissions for a worker by removing them from the Edit and Manage or Manage Only fields. Survey creators never lose permissions for the surveys that they create.
7. As you complete the Send Survey task, consider:

Option	Description
Send to specific organizations and/or individuals	Select whole organizations to respond to the survey or specify select individuals. This option also enables you to send a recurring survey to respondents on a daily, weekly, or monthly basis.

Option	Description
Send via link	This option generates a link to send to respondents. Respondents must sign in to Workday after clicking the link to take the survey. You can include this link in Workday Announcements to make it visible to all workers in Workday. You can also include this link to add a survey to a learning digital course.

For information on sending a draft survey as part of a campaign, see Steps: Set Up Survey Notifications and Campaigns on page 1403.

8. (Optional) To add respondents to a survey that you've already sent, from the related actions menu of the survey, select Survey > Add Survey Recipients.

   You can only add respondents to surveys sent to specific organizations and individuals. If you add respondents to a survey that's part of a recurring series, Workday only adds respondents to that single occurrence.

Result

Respondents receive notifications when they have a survey to complete.

Next Steps

- From the Survey Home report, you can:
  - Close surveys to stop survey responses.
  - Reopen surveys to enable respondents to take the survey again.
  - View the surveys that you've saved and launched, including the number of workers who completed the surveys.
- Use the Survey Responses or Survey Answers report data source to create custom reports.

Related Information

Tasks

Add Home and Dashboard Announcements on page 312

Create Learning Courses

Reference

Reference: Edit Tenant Setup - Notifications on page 107

Steps: Set Up Survey Notifications and Campaigns

Prerequisites

Security: These domains in the System functional area:

- *Security Configuration*
- *Set Up: Tenant Setup - BP and Notifications*

Context

You can create campaigns that deliver surveys to target audiences.

Enable survey notifications to let users know they have a survey to take.

Steps

1. Create Segment-Based Security Groups.

   Grant your security group access to the *Survey Campaigns* segment.
2. Edit Domain Security Policies.

   Grant permissions to your segment security group to the *Administer Campaigns* domain.
3. Edit Business Process Security Policies.

   Configure the security policy for the *Campaign Event* business process to add your segment-based security group.

   The security group must have access to the *Survey Campaigns* segment.
4. Access the Edit Tenant Setup - Notifications task.

   Configure delivery settings for the Surveys notification type.

   See Reference: Edit Tenant Setup - Notifications on page 107.
5. Configure a survey campaign.

   Steps: Set Up Campaigns on page 1369.

   To use surveys in a campaign, you must save a survey as a draft by clicking Save for Later. If you click Next, you won't be able to use that survey in a campaign.

Next Steps

Use the Survey Home report to view the surveys you saved and launch it for the campaign.

Related Information

Concepts

Concept: Email Templates on page 267

Steps: Send Surveys Using Scheduled Distribution

Prerequisites

On the Edit Tenant Setup - Notifications task, set up notification delivery settings for the Surveys notification type.

Security: *Administer Scheduled Distributions* domain in the System functional area.

Context

When you send surveys using scheduled distributions, you can configure additional notification settings that enable you to deliver a more robust survey experience.

Steps

1. Create Segment-Based Security Groups.

   Grant your security group access to the segment.
2. Edit Domain Security Policies.

   Grant your segmented security group access to the *Administer Scheduled Distributions* domain.
3. Access the Edit Tenant Setup - Notifications task.

   Configure notification settings for the Surveys notification type.

   See Reference: Edit Tenant Setup - Notifications on page 107.

   Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

4. Create and Send Surveys on page 1401.

   To deliver a survey through a scheduled distribution, you must save the survey as a draft by clicking Save for Later. If you click Next, you can't use the survey in a scheduled distribution.
5. (Optional) Create a message template for the notification channel that you want to send the survey through.

   See Steps: Set Up Message Templates on page 252.
6. Schedule a Notification to Send in the Future on page 1375

   In the Item Details tab:

   - Select *Survey* in the Content Type field.
   - Select the survey name in the Content field.

Result

Workday delivers the survey notification and message details to the audience members according to the defined schedule.

Concept: Surveys

You can use surveys to:

- Increase worker engagement.
- Gain constructive feedback.
- Inform your business decisions.

Survey Home

On the Survey Home report, you can:

- View surveys you've launched or saved as a draft.
- Access tasks to create and edit surveys.

Survey Status

What you can do with surveys depends on their status:

Status	Description
Draft	Surveys you haven't launched yet. You can only edit or share surveys in *Draft* status.
Open	Surveys currently accepting responses.
Closed	Surveys you closed to prevent additional responses.
Scheduled	Surveys that have a future launch date.

Survey Responses and Results

To see who responded to survey questions, you can access these reports, secured to the *Questionnaire Results* domain:

- Survey Results to view report charts for single-select and multi-select questions.
- Survey Responses to view responses by individual or all questions.

The *Questionnaire Results* domain uses segmented security so you can use security groups to limit report access to specific workers.

You can access the Survey Results report by clicking View Results on the Surveys Home report. You can access the Survey Responses report to view responses to:

- Individual questions by clicking View Results on the Survey Home page.
- All questions in a survey by running the report from global search.

You can also create custom reports on survey results using report fields secured to the *Questionnaire Results* domain or one of these report data sources (RDS):

- Survey Response
- Survey Answer

To see who responded and didn't respond to a survey, access the View Survey Response Rate report, secured to these domains:

- *Create and Manage Surveys*
- *Manage Surveys*
- *Questionnaire Creation and Distribution*

You can access this report by clicking the View Response Rate button on the Surveys dashboard.

Surveys Dashboard

You can use the Maintain Dashboards report to configure the Surveys dashboard.

You can configure the dashboard to include these reports:

- Active Surveys
- Draft Surveys
- Closed Surveys

Related Information
Tasks
Steps: Configure Questionnaire Security Segments on page 1109

FAQ: What is the Survey System user?

Survey System user is an Integrated Security User (ISU) created by Workday that enables users to take surveys using the Take Survey report. This ISU is secured to the non-configurable Workday Internal Security Group and can't be used to sign in a tenant. If you delete this ISU, you lose the ability to create surveys.

Glossary

Full Glossary of Terms

A	B	C	D	E	F	G	H	I	J	K	L	M
N	O	P	Q	R	S	T	U	V	W	X	Y	Z

Was this helpful?

A

Academic Date Range	The period of time associated with a student recruiting cycle.
Academic Level	The level of an educational objective that a student can pursue at an institution, such as:

	• Undergraduate, Graduate, or Professional at a university. • Associates or Baccalaureate at a community college.
Academic Unit	A Workday organization type that represents a school, college, university, or other unit of your institution. These units can recruit prospective students, admit students, offer programs of study or courses, or administer financial aid. Academic units are also used with academic appointments in Workday.
Academic Unit Hierarchy	A hierarchical grouping of academic units primarily used for roll-up reporting.
Accounting Cash	A group of cash ledger accounts that you can use to check cash balances against during settlement.
Accounting Cash Pool	One or more primary balancing worktag hierarchies that you can use to pool cash ledger balances for cash balance checks during settlement.
Active Candidate	A person with an application for a specific job requisition. Candidates must be linked to a job requisition for Workday to initiate a job application event.
All Ledgers Journal	An accounting journal that's not configured as a single ledger for the given company and is posted to both primary and alternate ledgers.
Applicant Pool	A subset of applications in an application grouping. Applicant pools enable you to control and adjust workload for application reviewers.
Application Grouping	A grouping of applications for the same admitting level of an academic unit and the same anticipated start date. Groupings can have 1 or more application pools, with an admissions counselor assigned to each pool.
Auto-fill	A time entry option that copies time blocks from a worker's schedule or from a previous week when entering time.
Award	A contract agreement with your sponsor in the form of funding to perform an activity for a public purpose. It defines how to capture direct and facilities and administration costs, recognize revenue, and bill your sponsor.
Award Costs Processing (ACP)	Processing facilities and administration costs and revenue recognition related to spend transactions on awards.
Award Credits	Percentage of award or award lines you allocate to specific worktags for reporting purposes.
Award Line	A line of authorized amount associated with a grant on an award. It includes information on the line's effective date, spend restrictions, basis limit, salary

	cap, and facilities and administration cost rates for expenditures charged to the grant.
Award Tasks	Administrative tasks that you do or track for a sponsor to support the terms of your award contract. Example: Quarterly progress report, financial report.
Aggregation Security Group	A security group that grants access rights to members of an included set of security groups. Revokes access of members of any excluded security groups.
Approve	An action in a business process that designated participants select to progress the event to the next step.
Assignable Roles	Positions you can assign to organization roles.

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B

Basis Limit	The maximum amount of direct costs you can use to calculate facilities and administration costs.
Base Pay Element	The compensation components that are included in the calculation of base pay for the purposes of determining the compa-ratio and target penetration. Example: Include both base pay and bonuses in the base pay calculation for compa-ratio.
Benefit Credit Bundle	A defined group of benefit credits that you can award together.
Benefit Defaulting Rule	A rule that identifies the benefit plans, coverage targets, and coverage amounts that employees receive by default when they do not complete an enrollment event.
Benefit Event Rules	These rules specify coverage increase limits, EOI requirements, waiting periods, and other rules and conditions of enrollment for benefits enrollment events.
Benefit Event Type	Identifies the events that trigger benefit enrollment, such as open enrollment, new hires, or the birth of a child. It also identifies the coverage types to make available to employees for when an event of this type occurs.
Benefit Group	A group of employees who qualify for benefits based on eligibility rules. Employees must be included in a benefit group to enroll in a benefit plan.
Business Object	Objects used to store data in Workday (such as organizations or workers). A business object has *fields* and *instances*, which are analogous to rows

	and columns in a spreadsheet. Workday links related business objects: a worker is associated with a position, the position to a job profile, and so on.
Business Process Definition	The tasks that compose a business process, the order in which they must be done, and who can do them.
Business Process Instance	A business process that the initiator has started. The *Hire Employee for Organization X* business process definition becomes an instance when the initiator uses it to hire an employee.
Business Process Security Policy	A business process security policy secures the steps and process-wide actions including view, rescind, cancel and correct. It specifies which security groups have access to each action.

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C

Calculated Time	Result of applying time calculations to a worker's reported time. Automates application of company or regulatory rules.
Calendar-Based Time Entry	A time entry method that uses the time entry calendar as the focal point for entering, editing, and submitting time.
Cancel (business process)	Canceling a business process stops the workflow in progress and reverses changes made to data. You can't cancel a completed business process; you must rescind it. A securable action in a business process security policy.
Candidate	Candidates include both prospects and active candidates.
Candidate Pipeline	All active candidates.
Candidate Pool	Candidates grouped together based on specific criteria.
Cascading Leave	A sequence of related leave types that are linked together. When an employee meets the conditions defined for ending a leave, Workday generates a return from leave request and a separate request for the next leave.
Company	Companies are organizations within Workday that represent the internal business entities within your enterprise. In Workday Financial Management, companies are the primary organization for all business processes. A Company is considered the level at which one holds a balanced set of books and should reflect Legal Entities where possible.
Company Hierarchy	Defines a parent-child or reporting relationship between Companies in your organizations. The way that you structure your hierarchies influences

	many important Workday functions, especially role assignments, planning, and reporting.
Compensation Basis	A grouping of compensation components, such as salary, commission, and allowance plans, that define estimated earnings for an employee population.
Compensation Component	The umbrella term for compensation packages, grades, grade profiles, and plans that can be associated with compensation eligibility rules.
Compensation Defaulting Rule	A rule that establishes the criteria for how compensation components default to worker compensation during staffing transactions (such as hire or job change).
Compensation Element	Compensation elements link Compensation to Payroll. When a compensation element is attached to a plan that is assigned to an employee, Workday can determine which earnings to use to pay the employee.
Compensation Package	A grouping of compensation guidelines (grades, grade profiles, and their associated steps) and plans that you can assign to workers as a set. Packages provide a quick view of the eligible plans for a particular job or group of employees.
Compensation Rule	Guidelines for determining which workers are eligible for which components of compensation.
Compensation Step	A specific monetary amount within a grade or grade profile.
Compensation Target Rule	A rule used to segment your employee population for assignment of compensation plans.
Conditional Calculation	Time calculation that tags time blocks that meet certain conditions.
Conditions	Conditions are one or more logical matches that are resolved to True or False and used to decide if some action should be taken. You can add conditions to steps in a business process to determine if the step should run.
Connection Map	A tool on a customer profile that enables you to establish and manage the relationships between business entities and ship-to addresses.
Connector	A set of 1 or more integration templates that provide a framework for building integrations in a particular functional area. The integration can support a specific type of data, or can support a specific endpoint (example: Salesforce.com or Okta).
Consolidated Billing Schedule	A billing schedule type that allows you to combine all charges for multiple projects or services within a specific billing period into one invoice.
Contextual Custom Report	A custom report created from the related actions menu of a Workday object by selecting Reporting

	> Create Custom Report from Here. Simplifies choices of data and fields to those related to the context of the object.
Contract Rate Sheet	A document that outlines the contract billing hourly rates for roles such as the engineer, manager, or consultant, with the option to add billing rules for specific contract considerations.
Conversation Tag	A descriptor, such as Dietary Restrictions or Special Needs that you can assign to an engagement conversation to identify its topic. You can search for conversations by conversation tag.
Conversation Topic	A conversation tag or recruiting event name that you can associate with an engagement conversation to make conversations easier to find.
Correct (business process)	Correcting a business process changes a specification or data in the workflow while in progress. A securable action in a business process security policy.
Cost Reimbursable Spend	A billing item that Workday creates to help you bill your sponsor for award-related spending. The cost reimbursable spend amount includes both the original spend amount and any overhead costs Workday calculates based on your award costs configurations.
Coverage Target	Defines whether a specific health care plan or insurance plan applies only to the employee or also to the dependents, spouse, family, and so on.
Cross Plan Dependency	Limits the coverage options available to workers during an enrollment event based on their choice of other benefit plans and coverage amounts. Example: You can limit coverage in a specific plan to a percentage of the total coverage in 1 or more other benefit plans.
Custom Report	Reports not delivered by Workday and built using the Workday Report Writer. Can be created new or by copying another standard or custom report.
Customer Payment Matching	A feature that uses historical payment applications to suggest customer invoices and adjustments that match customer payments with insufficient remittance advice.
Customer Refund Payments in Settlement Runs	A refund payment generated by the settlement run with a payment date that reflects the date you settle the refund.

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D

Dashboard (landing pages)	A specialized landing page containing a set of pre-configured worklets for a functional area that you

	can copy or modify. You can add additional custom worklets to dashboards using the report writer.
Data Source	A data source defines a set of business object instances for reporting purposes. Allows reporting access to all business objects related to those in the data source.
Day Breaker	The time of day on which a worker's work day and work week begins. Defines the 24-hour period over which daily time calculations execute and the 168-hour period over which weekly time calculations execute. Unless otherwise specified, the default day breaker is 12am.
Deny (business process)	When you deny a business process, the business process is terminated and all Workday data is restored to its state before the business process started. To restart the business process, you need to submit the process again, and redo all previously completed steps.
Depreciation Profile	A configuration that determines how Workday depreciates assets by defining a depreciation method, convention, and useful life.
Designation	An attribute, such as Community Learning Partner, Honors, or STEM, that you can associate with educational institutions and external associations to make them easy to find and report on.
Discrete Composite Asset	A combination of related but distinct assets for which you can individually track cost, depreciation, and lifecycle events.
Disposition	Status of candidates that have been rejected for hire or declined a job during the job application event.
Domain	A collection of related securable items such as actions, reports, report data, report data sources, or custom report fields. Each domain is secured by a domain security policy.
Domain Security Policy	A collection of related securable elements of different types and user-specified security groups that have access to elements of each type.
Dynamic Period	A date that identifies the anticipated start date for a student of online education or other asynchronous learning.

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E

Educational Taxonomy	A taxonomy scheme and set of codes you can assign to programs of study and their concentrations to meet state, local, or other classification requirements.

Effort Grant	The sponsor funded grant associated with the worker's certified effort.
Effort Recertification	The process you use to recertify an employee's effort in response to payroll accounting changes that occur after you last certified the effort.
Eligible Investigator	A type of role that you can use to assign individuals to awards, grants, and grant hierarchies, so that the role assignments remain intact even when the person's position or organization changes.
Engagement Action Item	Defines a requirement that must be met for an application for admission to be considered complete. Example: Submit transcripts.
Engagement Item	An engagement email or printed engagement item. You can include engagement items in engagement plans and use them to support student recruiting events.
Enrollment Event Rule	A rule that defines coverage start and end dates, waiting periods, coverage increase limits, Evidence of Insurability requirements, and other coverage rules and conditions. Rules ensure that the benefits process presents only the options that each employee is eligible for based on the event type.
Enterprise Interface Builder (EIB)	An integration tool that enables you to create simple, secure, and customizable integrations with Workday. Alternately, an EIB is a simple integration created by the integration tool. An EIB consists of an integration system, an integration data source, an integration transformation, and an integration transport protocol.
Estimate at Completion (EAC)	Includes all the hours logged and approved for the project, as well as the future hours the worker expects to complete.
Estimate to Completion (ETC)	Includes the future hours the worker expects to complete.
Event	A business process transaction that occurs within your organization, such as hiring or terminating an employee.
External Association	A nonprofit, community-based, or other noneducational organization that you can associate with student prospects or identify as a location for recruiting events.
External Engagement Item	Used to send and track third-party engagement items for recruiting events, communication plans, or ad hoc communications.

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F

Fast Path	A streamlined approach to moving applications for admission from submission to matriculation as quickly as possible.
Field Overrides	A tool that lets you customize integration systems that are based on a connector template. Field overrides are managed through an integration service. They use calculated fields or report fields to supply values to an integration system. Example: member IDs in benefit provider integrations.
Financial Aid Period Record	A record containing data such as academic unit, academic level, and program of study for a student that Workday uses to process financial aid for an academic period.
Functional Area	A collection of domain or business process security policies that are related to the same set of product features, for example, Benefits or Compensation.

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G

Grade Profile	A breakdown of a compensation grade by functional task, geographical region, or other categorization your business requires. A profile enables you to assign more granular compensation ranges to workers.
Grant	A worktag you use to charge award-related expenditures to an award line.

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H

Headcount Plan	Provides visibility into the number of workers necessary to achieve your business goals within a specified period of time.

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I

Individual Target	An individual bonus or merit target for a worker during a compensation review process that overrides the target defined on the compensation plan.
Integration Attribute	An integration component that specifies the tenanted value of a data element in Workday. Example: Plan Sponsor Name is a type of attribute in benefit provider integrations.
Integration Data Source	Indicates the type of data that Workday receives from or exports to an external system and its location.

Integration Event	The record of an integration process. Every integration—current or past, involving the import or export of data, successful or not—gets recorded as an integration event. The integration event contains all the information about the integration process, including its status.
Integration Map	An integration component that specifies how values in Workday map to values in an external system. Example: Pay Rate Frequency is a type of map in third-party payroll integrations.
Integration Service	A group of related integration attributes, maps, and XSLT that provides a framework to transform Workday data into the format required by an external system.
Integration System	A tenanted definition of an integration between Workday and an external system based on a template that provides the methodology for communicating data.
Integration Template	A collection of integration services that enables communication between Workday and an external system. Workday provides integration templates in categories such as Benefits, Financials, HCM, Payroll, Payroll Interface, Procurement, Recruiting, Security, and Settlement. Many of the delivered templates contain default values for attributes, as well as prompt values for attributes and maps, to define the integration further.
Integration Transformation	Converts data into a format that Workday or a receiving external system can understand. Workday provides some delivered transformations, and you can also create custom transformations.
Integration Transport Protocol	Controls how Workday exports data to an external endpoint or service or imports the data from an external endpoint or service. Workday supports several types of transport protocols, including email, FTP and SFTP, HTTP/SSL, Workday attachments, and Workday Web Services.
Intersection Security Group	A security group whose members are other security groups. Members associated with all included security groups are granted access through an intersection security group.
Initiation Step	The first step of a business process.

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J

Job-Based Security Group	A security group that includes one or more job-related attributes or objects including job profile, job family, job category, management level, or exempt/non-exempt status.

Job Management Staffing Model	A structure that defines 1 set of hiring restrictions for all jobs in a supervisory organization, with no specific limits on the number of jobs that can be filled.
Job Profile	The generic features and characteristics of a job or position, such as management level, pay rate type, compensation, skills, and other qualifications.

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K

Knowledge Article	An article that is accessible to workers in your organization based on the assigned article audience. You can use these articles to document, share, and manage HR information specific to your organization.
Knowledge Article Audience	A group of employees that can view designated Knowledge articles. Their access to articles is determined by condition rules assigned to the audience.

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L

Landing Page	Landing pages display a collection of worklets. Landing pages may have different display formats (grid or bubble) and support different functions. The Home landing page is intended for common worklets, such as self-service worklets.
Leave Family	A set of similar leave of absence types. Example: A company-specific family includes disability leave and bereavement leave, while a separate regulatory family includes jury duty and family medical leave.
Leave of Absence Rule	A rule that defines worker eligibility for leaves of absence.
Line Tax Rate Application (LTRA)	A collection of tax amounts that apply to a given transaction line or supplier invoice line split on a taxable document.
Linked Customer Contracts	Child customer contracts that you associate with a parent customer contract for revenue allocation purposes.
Linked Leave	A leave type that shares an entitlement with other leave types or time offs. Eligibility rules, validation rules, and supporting data reference the combined balance of the associated leave types and time offs. Also known as coordinated leaves and time off.
Location Membership Security Group	A security group whose members are any workers assigned to that location.

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M

Match and Merge	A process that helps eliminate duplicate student prospect information in Workday.
Micro-edit	The ability to edit existing time blocks or add time blocks directly to a day by clicking the time entry calendar.
Multiplier-Based Coverage	Insurance coverage based on multiples of salary, such as 1x, 2x, or 3x salary.

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N

Nonbillable	A nonbillable project is an internal project that you don't invoice customers for.

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O

Object Class	The spend categories that award sponsors agree to reimburse award recipients for maintaining their projects.
On-Account Document	A document that's generated when you place a payment amount on an existing customer account. You can apply on-account documents to future payments.
Organization Security Group	A security group whose members are any workers assigned to that organization.

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P

Parent Customer Contract	A customer contract that you associate with a child customer contract so you can add contract lines across contracts to the same schedule. When you view the parent customer contract, Workday displays the child customer contracts as linked contracts.
Passive Event	Events that result from the passage of time rather than from a specific change to employee data.
Payment Group	The payments that result from a settlement run.
Payment Tax Rate Application (PTRA)	A collection of tax amounts that apply to a given payment on a taxable document.
Position Management Staffing Model	A structure that defines different staffing rules and restrictions for each position in an organization.
Position Restrictions	The attributes and conditions that apply to an unfilled position in a supervisory organization that uses the position management staffing model. Example: Job profile, location, qualifications, and worker type.

Pre-Hire	In Staffing, an individual you're tracking before employment. In Recruiting, a candidate who is in the *Offer*, *Employment Agreement*, *Background Check*, or *Ready for Hire* stage.
Procurement Contract	Contracts enable your organization to define preferred suppliers, analyze spend for better control, and standardization. They also allow your organization to implement contractual spend to better negotiate and enforce discounts and other supplier terms.
Procurement Contract Type	A procurement contract in Workday is always associated with a Contract Type that dictates how the contract can be used across the procure-to-pay chain. Example: when a Contract Type has the Scheduled Purchase Orders option set, Workday can use the contract to automatically create purchase orders based on a predefined schedule.
Pro Forma Effort Certification	A report you can run before you run effort certification to review estimated effort based on salaries and wages that payroll accounting attributes to grants. It allows you to take corrective action, such as payroll accounting adjustments, prior to certifying employee effort, to ensure a more seamless certification process.
Project Advanced Labor Costing	Prorating project labor costs using standard or fully burdened costing.
Project Asset	A container that captures separate, ongoing costs of a capital project in progress. You can associate multiple projects assets with a project to track costs over the life of a project.
Project Billing Rate Sheet	A document that outlines the hourly or daily rates charged per project role, with the option to be more specific based on defined categories such as Region, Skill Level, and Project Size.
Project Plan Phase	A phase in the project plan that represents a stage in the project work. Example: Plan and Strategize. A project plan organizes projects into sequenced phases and tasks. A project phase is generally project agnostic, but when you add that phase into a project plan, it becomes a project plan phase.
Project Plan Task	The work details in a project plan phase. Example: Define Project Objectives.
Project Transaction Source	The source of project billing transactions. Example: Supplier Invoice, Expense, or Time.
Prospect	Someone you are interested in tracking who isn't associated with a specific job. You can use tags, prospect types, and prospect statuses to help track these individuals.

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Q

Quick Add	A time entry option that enables you to create a time block and copy it to multiple days in a week.

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R

Recipient Threshold	The maximum number of prospects to whom you can send an engagement item at the same time without requiring approval.
Recruiting Cycle	A recruiting period for 1 or more academic levels of an academic unit. You associate recruiting cycles with campaigns to measure the effectiveness of each campaign per recruiting cycle.
Reference ID	A unique identifier used to look up data for integration purposes.
Reference Pay Range	A range of pay established for a compensation grade or grade profile.
Related Customer Contract	A customer contract that you associate with another customer contract for reporting purposes. When you create a customer contract, you can associate 1 related customer contract with it. The related customer contract must share the same company and sold-to customer.
Reported Time	A worker's time that has been entered, but has not had any time calculations applied.
Revenue Category	An attribute in customer contracts and billing used to search for and report on goods and services you sell. Also a dimension in account posting rule types for customer contracts, billing, and accounts receivable that drives accounting behavior.
Risk Insight	Provides the reason why Workday identifies an expense report with a High or Medium risk level. Reasons may include 1 or more of these: Amount Anomaly, Duplicate Expense, and Incorrect Expense Item.
Risk Level	The value (Low, Medium, and High) that Workday provides from risk evaluation. Workday provides default risk levels, which can also be configured based on Risk Score.
Risk Score	The numerical value (0 to 100) that Workday provides from risk evaluation. The score helps identify anomalous expense reports.

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S

Salary Over the Cap Basis	A worktag type representing the effort grant on over-the-cap salaries when you have salary over the cap enabled on your tenant. For the portion of

	salary that's over the cap, the Salary Over the Cap Basis worktag identifies the effort grant, while the Grant worktag, if applied, identifies the grant on the salary over the cap suballocation.
Salary Over the Cap Suballocation	Worktags and their distribution percentages that you want to allocate on the portion of salary that's over the salary cap.
Single Ledger Journal	An accounting journal that's a single primary or alternate ledger currency for the given company.
Source	The duplicate record that you want to merge in the Duplicate Management Framework.
Spend Category	A logical grouping to search and report on acquired items and services. Also a dimension in account posting rules for procurement and spend that drives accounting behavior.
Staffing Model	A structure that defines how jobs and positions are created and filled in a supervisory organization. Workday supports 2 kinds of staffing models: • Job management. • Position Management.
Staffing Organization	An organization category that includes supervisory organizations, matrix organizations, or retiree organizations.
Stage	A value, such as Lead, Inquirer, or Applicant, that identifies where a student prospect is in the recruitment or admissions process.
Student Financials Period Record	A record containing data such as academic unit, academic level, and program of study for a student that Workday uses to process student financials transactions for an academic period.
Student Prospect Profile	A worklet that displays information for a prospective student, including contact information and recruitment details.
Student Prospect Type	A value, such as First Year or Adult Returning, that you can assign to prospective students and use to match student prospects to admissions counselors automatically.
Student Recruiting Region	Workday term for recruiting territory. A recruiting region can represent a geographical area, 1 or more schools, or schools in selected school districts.
Student Tags	An attribute, such as Veteran, Athlete, or Scholarship Recipient, that you can assign to student prospects. You can use tags to match student prospects to recruiters automatically, find prospects, and use as criteria for associating engagement plans with prospects.
Supplier Contract	Contracts enable your organization to define preferred suppliers, analyze spend for better

	control, and standardization. They also allow your organization to implement contractual spend to better negotiate and enforce discounts and other supplier terms.
Supplier Contract Type	A supplier contract in Workday is always associated with a Contract Type that dictates how the contract can be used across the procure-to-pay chain. Example: when a Contract Type has the Scheduled Purchase Orders option set, Workday can use the contract to automatically create purchase orders based on a predefined schedule.
System User	An account associated with and required to launch a Connector or Studio integration. Workday delivered integrations and custom integrations require a system user account for authentication and web service calls. A system user account is not associated with a person in Workday.
Staffing Organization	An organization category that includes supervisory organizations, matrix organizations, or retiree organizations.

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T

Target	The record into which you want to merge the source in the Duplicate Management Framework.
Tax Code	A combination of tax rates that you select on transaction lines.
Tax Rate Application (TRA)	A collection of tax amounts across all lines on a taxable document with the same tax applicability, tax code, tax option, tax point date, tax rate, and tax recoverability.
Tax Recovery Pro Rata Factor Percentage	A company-specific percentage that modifies the tax recoverabilities that you configure for the tenant.
Termination Adjustment	A time off adjustment that automatically sets the remaining balance of a worker's time off plan to zero upon the worker's termination.
Time Block	A time block carries information about a portion of time, such as the number of hours worked or in/out times. Time blocks can be reported or calculated, but only calculated time blocks are pulled into Workday Payroll.
Time Calculation	A set of rules to apply time calculation tags to calculated time blocks for Payroll or other purposes. Example: You could create a time calculation to convert regular hours into overtime hours automatically if a worker works more than 40 hours in a week.
Time Calculation Tag	Workday applies calculation tags to time blocks during time calculations. The tags map to payroll

	earnings to drive how time blocks are paid and can be included in time off and accrual calculations. You can also use them to display time and time off totals on the time entry calendar.
Time Clock Event	A time clock event describes a worker's actions, such as a check-in or check-out, on the web time clock or an external time clock. Workday matches time clock events to form time blocks, which workers can edit and submit.
Time Code Group	The primary use of a time code group is to determine which time entry codes a worker is eligible for. Time code groups are assigned to a worker or to a position through eligibility rules.
Time Entry Calendar	A set of self-service pages that workers use to enter, edit, and submit time, when using calendar-based time entry. When using high volume time entry, workers can view and submit time from the time entry calendar.
Time Entry Code	A time entry code describes the type of time a worker enters, such as worked time or meal allowance. To use time entry codes, you must attach them to time code groups, except for the default time entry code assigned to a time entry template.
Time Entry Template	A template defines how a worker's time entry calendar is configured. Workers are matched to time entry templates through eligibility rules.
Time Entry Validation	Errors or warnings that prevent users from entering invalid time. Critical validations prevent a user from submitting time. Warnings display when entering time but don't prevent the worker from submitting time.
Time Off	The rules that apply to a specific type of time off, including eligibility rules, whether adjustments are allowed, and limits that differ from the time off plan.
Time Off Plan	The rules for entering and tracking 1 or more related time offs. Identifies the unit of time, eligibility requirements, whether to track balances, and if time offs are position-based or worker-based.
Time Period Schedule	A time period schedule defines which dates are available for entry at a given time and defines which dates are paid in which pay periods. They can line up with pay periods, or, in more complex scenarios, they can be paid on a lag.
Time Proration Rule	A rule that prorates employees' target compensation in a bonus or merit increase compensation event according to time-based criteria, such as leave of absence or time since hire.

Time Shift	A grouping of consecutive time blocks that you can use in standard overtime calculations, time block conditional calculations, and validations.

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Unbillable	An unbillable transaction is a billing transaction that has an issue preventing it from being billed. You can't take action on the transaction until you resolve the issue.
Unnamed Resources	Placeholders for project resources that you can use to assign tasks and perform resource forecasting without specific resource assignments.

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Value-Based Project	A customer contract line type that you use when your project billing installment values are not known at the time of contract creation.

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Wave Picking	Enables you to group picking lists together in groups to better organize and prioritize your inventory picking process
Week Breaker	The day of the week on which a worker's work week begins. Defines the 7-day period over which weekly time calculations execute. Unless otherwise specified, the default week breaker is Sunday at 12am.
Work Schedule Calendar	A calendar that defines the days and hours that a worker is scheduled to work. In Time Tracking, work schedule calendars affect time entry options, calendar displays, and time calculations.
Workday Studio	An Eclipse-based development environment that enables you to build more complex integrations with Workday.
Workday Web Services	Workday’s public API. Based on open standards, Workday Web Services (WWS) provide the core method for integration with Workday.
Worker	An employee or a contingent worker.
Worklets	Mini applications represented by clickable icons in Workday, providing quick and easy access to tasks and data that you access regularly. Example: the Inventory or Time Off worklets, or a worklet based on a report.

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No Entries

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Y

No Entries

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Z

Zone Picking	A method of picking for orders from different zones at an inventory site. In Workday, you can split a stock request into multiple zone picking lists for more efficient picking and shipping. You can then ship the zone picking lists separately or merge them before shipment.

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