Workday Feature Descriptions

Product Summary

December 10, 2025

workday.

Contents

Workday Feature Descriptions Guide

Welcome to the Workday Feature Descriptions Guide where you can access high-level feature descriptions for the capabilities in the Workday products.

Workday Adaptive Planning

Reference: Workday Adaptive Planning Product Areas

You can view high-level feature descriptions for the Workday Adaptive Planning product areas.

Modeling

Provides pre-built, configurable models for financial, sales, or workforce planning. The functionality supports:

- Configurable dimensions for budgets, scenarios, and forecasts.
- Formulas, links, and lookup tables to drive data throughout the model.
- Metadata to build and update Workday Adaptive Planning models.

APIs

Provides the ability to manage the model and administration through APIs. The functionality supports importing and exporting:

- Administrative details, such as permission sets and users.
- Data from source systems into Workday Adaptive Planning sheets.

Integration Management

Provides the ability to integrate data and metadata from external applications and information systems in an open technology framework. The functionality:

- Supports the configuration of data sources that connect to external systems.
- Supports data preparation and metadata mapping to Workday Adaptive Planning modeling elements.
- Provides data and metadata loaders.
- Supports scheduled tasks to automate the synchronization of data and metadata between source systems and Workday Adaptive Planning.

Manual Import and Export

Provides the ability to manage data and the structure of the Adaptive Planning model. The functionality supports:

- Data imports and exports.
- Mapping metadata for imports and exports.
- Erasing data by version type or time period.

Security Administration

Provides the ability to:

- Control access to various parts of Workday Adaptive Planning.
- Configure permissions for users.
- Restrict data.

Connection to Workday Financial Management

Provides the ability to synchronize financial plans in Workday Adaptive Planning with financial actions and data in Workday Financial Management. The functionality supports:

- Workday Financial Management as a data source that surfaces actuals data in plans.
- Drilling from planning data in sheets to Workday Financial Management objects and transactions.
- Publishing and executing Workday Adaptive Planning financial plans in Workday Financial Management.

Consolidation in Planning

Provides businesses that have subsidiaries the ability to align plans to the financial activities and records required by GAAP. The functionality supports:

- Integration of ERP source data.
- Intercompany eliminations.
- Minority interest tracking.

Sheets

Provides configurable interfaces of data, and:

- Security to protect, lock, and hide data.
- Different sheet types.
- Ability to explore data and contributing details.
- Ability to enter and adjust data.
- Ability to view options, filters, and search capabilities to help locate data.

Process and Workflow

Provides the ability to collaborate during planning cycles.

Web Reporting and Dashboards

Provides the ability to analyze Adaptive Planning data and contributing details.

Workday Analytics and Reporting

Reference: Core Reporting Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Customers that have subscribed to Services in these Product Lines may have access to some features in this product area: Analytics and Reporting, Financial Management, Human Capital Management, Payroll, Spend Management, Student, Talent Management, and Workforce Management.

Foundational Reporting

Supports foundational reporting of data. The functionality provides the ability to:

- Access standard reports with ability to copy and edit.

- Create reports to perform various actions on the data from primary and related business objects.
- Create custom dashboards that group related worklets.
- Create calculated fields to be used in reports.

Analytics and Insights

Supports analytics, insights, and charting on data in the tenant through reports, dashboards, and discovery boards.

Interactivity and Self Service

Supports user interactivity and self-service data based on configuration options, sharing, and security access.

Report Distribution

Supports the distribution of reports. The functionality provides the ability to:

- Support authorized users to share and distribute reports.
- Schedule reports or report groups in the background.
- Support Workday Query Language (WQL), a SQL-like syntax, to access Workday data using data sources and fields instead of reports.

Report Management

Supports tracking of report usage and managing reports. The functionality:

- Includes reports to view custom and standard reports in the tenant.
- Provides the ability to mass delete custom reports.
- Provides a dashboard to display reports and tasks that help administrators manage reports in the tenant.
- Includes reports to view how many times a report ran and includes details such as who ran the report and at what time.
- Supports report tags to categorize reports and report output files for easier searching.
- Provides the ability to create temporary reports.

Reference: People Analytics Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Configuration

Provides the ability to influence the data feeding the insights that are surfaced in People Analytics.

Content for People Analytics

Provides the ability to view key performance indicators (KPIs) and insights across the employee lifecycle.

Integrations

Provides the ability to drive awareness of insights and seamlessly transition KPIs and insights surfaced for further analysis or storytelling within Workday.

Reference: Prism Analytics Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Analytics and Insights

Provides the ability to blend Workday and non-Workday data together in a single place with integrated security domains where end users can report on and analyze data.

Data Acquisition

Provides the ability to ingest Workday and non-Workday data into Prism.

Data Management

Provides the ability to manage and control access for Prism artifacts.

Data Transformation

Provides the ability to:

- Blend Workday and non-Workday data.
- Transform data to a derived dataset in a format ready for analysis.

Interactivity and Self Service

Provides users the ability to prepare data using a visual and drag-and-drop interface.

Reference: Slides Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Customers that have subscribed to Services in these Product Lines may have access to some features in this product area: Analytics and Reporting, Financial Management, Human Capital Management, Payroll, Spend Management, Student, Talent Management, and Workforce Management.

Data Analytics Presentation

Provides the ability to create, collaborate on, and share presentations that integrate live transactional data.

Presentation Data Refresh

Provides the ability to refresh linked data in a presentation to keep content up to date when changes occur in associated data.

Reporting and Analytics

Provides the ability to link data as tables, charts, and individual text values.

Reference: Worksheets Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Customers that have subscribed to Services in these Product Lines may have access to some features in this product area: Analytics and Reporting, Financial Management, Human Capital Management, Payroll, Spend Management, Student, Talent Management, and Workforce Management.

Data Extraction

Provides the ability to manually initiate or automatically schedule updates from a report to the workbook.

Reporting and Analytics

Supports a spreadsheet component in Workday that enables ad-hoc data exploration, analysis, visualization, and collaboration with secure, live Workday data as well as with external data.

Workday Contract Management and Document Intelligence

Reference: Contract Intelligence Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Contract Analysis Interoperability

Provides the ability to bulk import documents from and export data to third-party platforms.

Contract Management Administration

Supports user and document management. The functionality provides the ability to:

- Configure the document data layout.
- Configure single sign-on.
- Delete and restore files.
- View and export audit logs of user activity.

Contract Search and Reporting

Supports customizable search, dashboard, and reporting capabilities with AI-driven findings. This functionality supports:

- Configurable notifications for contracts in the document repository.
- Exporting search results and dashboard data.
- Organize documents in hierarchical groups.
- Saving and sharing custom search queries and custom dashboards.

Document Access Controls

Provides the ability to folder access over documents and metadata. The functionality supports:

- Creating and managing user profiles and user groups with content access permissions that are based on the configured information architecture.
- Creating user roles to manage feature access.
- Restricting access to documents available through searches, dashboards, and chat AI responses.

Document Analysis

Supports AI and OCR analysis for scanned documents of varying readability and various file types. This functionality supports:

- Analyzing documents to extract data and clauses.
- A chat interface to obtain AI responses about documents.
- A document repository that provides the ability to leverage AI for document queries.
- Creating and training AI models to extract information and deliver actionable insights.
- Managing all AI models created for document analysis.

Document Ingestion & Sync

Provides the ability to upload documents, submit documents and import documents in bulk from storage platforms.

Supplier Contracting

Provides the ability to integrate data and metadata from supplier documents.

Reference: Contract Lifecycle Management Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Contract Analysis Interoperability

Provides the ability to bulk import documents from and export data to third-party platforms.

Contract Management Administration

Supports user and document management. The functionality provides the ability to:

- Configure the document data layout.
- Configure session duration and reauthentication frequency.
- Configure single sign-on.
- Delete and restore files.
- Manage internal and counterparty classification.
- View and export audit logs of user activity.

Contract Redlining, Editing & Collaboration

Supports contract inspection. This functionality provides the ability to:

- Edit contracts, track changes, and collaborate directly within the platform.
- Distinguish between internal and counterparty versions.
- Revise contracts and sync changes with the master document.
- Review contracts based on the organization’s negotiation strategy.

Contract Review & Ticket

Supports the contract negotiation and review process with AI assistance. This functionality provides the ability to:

- Ask AI about contract terms and get answers.
- Assign post-signature tasks and track their completion status.
- Create a clause library that includes guidance on clause usage during negotiations and provides contract drafting.
- Customize approval workflows and track actions as a contract goes through the review process.
- Save key clauses in a library with usage guidance.
- Send alerts to notify users of approvals assigned to them and enable them to give approval.
- Save and share AI prompts by contract type.
- Track contract review metrics.

Contract Search and Reporting

Supports customizable search, dashboard, and reporting capabilities with AI-driven findings. This functionality supports:

- Configurable notifications for contracts in the document repository.
- Exporting search results and dashboard data.
- Organize documents in hierarchical groups.
- Saving and sharing custom search queries and custom dashboards.

Contract Signature

Provides the ability to configure signatures process and integrate with third-party electronic signature platforms.

Contract Workflow Design

Provides the ability to configure contract workflows with conditions that activate defined events.

Contract Workflow Interoperability

Supports the transfer of workflow metadata with third-party platforms. This functionality provides the ability to:

- Display contract statuses and activity logs.
- Initiate contract workflows.
- Update contract statuses based on actions in third-party platforms.

Contract Workflow Optimization, Comments & Notifications

Supports contract workflow optimization, comments and notifications. This functionality provides the ability to:

- Engage in conversations within the contract workflow.
- Provide alerts for key contract workflow activities.
- Review contract metrics.
- View contract workflows and track their status.

Document Access Controls

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- Managing all AI models created for document analysis.

Document Ingestion & Sync

Provides the ability to upload documents, submit documents and import documents in bulk from storage platforms.

Intake

Provides the ability to configure intake forms for contract requests and generate contract drafts.

Supplier Contracting

Provides the ability to integrate data and metadata from supplier documents.

Reference: Salesforce Connector for CLM and CI

You can view high-level feature descriptions for the capability in this product area.

Salesforce Integration

Provides the ability to integrate data and metadata from sales contracts that can be searched and reported on.

Workday Financial Management

Reference: General Ledger Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Accounting Adjustments

Supports adjustment of transaction lines to reclassify costs on:

- Expense reports.
- Procurement cards.
- Supplier invoices.
- Supplier invoice adjustments.

Allocations and Statistics

Supports the distribution of ledger amounts from 1 organization to another. The functionality provides the ability to:

- Allocate based on budgets and statistics.
- Allocate costs.
- Create operational journals.
- Monitor status and results.
- View financial impact before posting.

Auditoria.AI Smartbots for Workday

Provides the ability, by partnering with Auditoria, to automate accounts payable (AP processes) AP accruals process. The functionality supports the ability to:

- Help in monitoring, classifying, and responding to supplier emails.
- Send estimated accrual expenses to suppliers.
- Compile responses and compute monthly accrual journals.

Average Daily Balance

Provides the ability to track daily activity and report on average daily balances.

Funding Sources

Provides the ability to:

- Set aside funds to use for specific purposes.
- Retroactively allocate funds to spend transactions.

Intercompany

Supports business events transacted between related companies. The functionality provides the ability to support:

- Intercompany relationships.
- Direct intercompany transactions to exchange supplier and customer invoices.
- On-behalf-of intercompany transactions to track money.

Journals

Provides the ability to:

- Generate journals for operational transactions.
- Support recurring journals.

Lease Accounting

Supports recognizing and recording lease liabilities and right-of-use assets for lease contracts. The functionality provides the ability to:

- Support financial and operating lease-type supplier contracts.
- Use alternate contracts to assist with comparative reporting.
- Create receipts and register business assets.
- Enable migration of lease contracts.
- Generate accounting for expense recognition and supplier invoice installments.
- Support change amendment types for contract extension and non-consumer price index payment changes.

Tax Processing and Reporting

Supports calculating, recording, and reporting on tax-relevant data for submission to tax authorities in supported locations. The functionality provides the ability to:

- Calculate tax on operational transactions and manual journals.
- Calculate transaction tax and withholding tax.
- Support generation of 1099MISC, 1099NEC, and UK VAT tax e-filing.

Tenant Setup and Work Tag Configuration

Provides the ability to configure alternate account sets and post accounting entries to different ledger accounts. The functionality supports the ability to:

- Segregate financial transactions and associate all accounting transactions with a book code.
- Customize validations to control input on tasks.
- Retain amounts on journals by configuring primary and optional work tags.
- Define the relationships between work tags.

Workday Bank Connectivity

Workday Bank Connectivity facilitates connections between Workday Financials customers and their financial institutions. The functionality supports the ability to:

- Receive bank statements.
- Receive payment acknowledgements.
- Send electronic payments.

Reference: Accounting Center Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Accounting

Provides the ability to configure journal line rules and custom validations for accounting. The functionality supports:

- Accounting for intercompany, multicurrency, and pass-through transactions.
- Event-based accounting.
- Manual Accounting Center journals.
- Multiple accounting groups for an accounting source.

Accounting Source Ingestion

Provides the ability to load data into ingestion tables.

Accounting Source Setup

Provides the ability to create and set up accounting sources.

Batch Initiation

Supports the creation of batches to process sets of source transactions.

Enrichment

Supports the enhancement and refinement of source data.

Error Processing

Provides the ability to view and resolve errors that occur during batch processing.

Manual Accounting Center Detailed Journal

Provides the ability to create general ledger journals and populate detailed accounting table.

Process Orchestration

Provides the ability to define how Workday processes batches.

Reporting

Supports the ability to group, sort, and filter detailed and summarized data.

Reference: Accounts Payable Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Accounting Adjustments

Supports adjustment of transaction lines to reclassify costs on:

- Procurement cards.
- Supplier invoices.
- Supplier invoice adjustments.

Item Management

Provides the ability to create and manage goods and services that can be requested, ordered, invoiced, received, and stocked.

Procurement Card Processing

Provides the ability to control and verify procurement processing and related allocated spend.

Supplier Contracts

Provides the ability to:

- Create and manage supplier contracts and banking records.
- Define contract renewal terms and notifications before contracts expire.
- Establish and record payment terms.
- Restrict supplier selection on transactions.

Supplier Invoice Capture

Supports invoice scanning and recording.

Supplier Invoice Processing

Provides the ability to:

- Create, adjust, and enter data for supplier invoices and remittances.
- Determine variances between invoices and related documents.
- Set up account invoicing.
- Support invoice spend category recommendations.
- Validate VAT numbers.

Supplier Invoice Processing for Procurement Transactions

Provides the ability to:

- Generate multiple invoices based on supplier invoice contract schedules.
- Record accrual for goods and services received but not yet invoiced by suppliers.

Supplier Invoice Reporting

Provides the ability to view suppliers, supplier invoices, and transactions.

Supplier Payments

Provides the ability to assign supplier currency lists.

Suppliers

Supports supplier registrations.

Reference: Accounts Receivable Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Customer Collections

Supports tracking invoices and collection risk. The functionality provides the ability to:

- Automate statements, dunning, interest and late fees.
- Create customer refunds and debt write offs.
- Email collection letters to customers.
- Hold invoices that are in dispute.
- View outstanding receivables, billing, and payment transactions.

Customer Invoice Presentment and Delivery

Provides a:

- Configurable business process to send invoices and attachments by email.
- Customizable e-invoicing connector to send invoices in XML and UBL formats.

Customer Invoice Processing

Provides the ability to generate PDF copies of invoices and attachments. The functionality supports:

- Consolidation of multiple invoices.
- Direct intercompany customer invoices.
- Invoice adjustments.

Customer Management

Supports storing and managing customer information. The functionality provides the ability to:

- Configure multiple entity activity codes by country for customers.
- Define delivery types and email recipients for customer documents.
- Report on the history of the changes made to customer records.
- Restrict access to customer data.
- Set ship-to customer based on the bill-to customer.
- Support different bill-to contacts for different document types.

Customer Payment Processing

The functionality provides the ability to:

- Apply payments against multiple invoices.
- Cancel and return customer payments.
- Support cash sales.
- Create customer invoices and payments in currencies other than the base currency of companies.
- Create custom application rules and definitions.
- Determine effective payment application automation rates.
- Import incoming customer payments in the Bank Administration Institute (BAI) lockbox format.
- Initiate direct debit payments.
- Net balance payable or receivable calculations when an entity is both customer and supplier.

- Manage overpayments.
- Pay direct intercompany invoices in multiple currencies through a direct intercompany netting process.
- Recognize Value Added Tax (VAT).
- Record customer payments and deposits from bank statement lines and reconcile the deposits.
- Record large volumes of payments at the same time.
- Un-apply an incorrect payment and reapply it correctly.
- Use the payment date currency rate for cross-currency customer payment applications.

Reference: Asset Management Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Asset Accounting

Provides the ability to:

- Account for non-depreciable assets and single assets in multiple books.
- Assign accounting treatment and depreciation profiles.
- Assign and restrict assets to books.
- Assign accounting information to business assets.
- Split costs and depreciation for assets.
- Track and report on registered capital assets.

Asset Reporting

Provides reports that detail depreciation expenses and the differences between operational and ledger asset balances.

Asset Tracking

Provides the ability to make workers custodians of company property, and track assets separately from accounting activities.

Intangible Assets

Supports the creation and amortization of intangible assets.

Leased Assets

Leased Assets track and depreciate assets created from lease-type supplier contracts.

Reference: Budgetary Control Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Budgetary Controls

Provides the ability to:

- Configure business processes to approve budgets and budget amendments.
- Evaluate transactions against available budgets.
- Manage budget check exceptions.

Budgets

Provides the ability to:

- Create and maintain multidimensional budgets.
- Link budgets through parent-child relationships.
- Track and report on actuals against budgets.

Reference: Capital Projects Capability

You can view a high-level feature description for the capability in this product area.

Capital Projects

Provides the ability to collect project costs and convert them into business assets.

Reference: Cash Management Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Bank Account Management

Supports managing bank account information in Workday. The functionality provides the ability to:

- Configure cash pools.
- Configure company bank accounts.
- Designate bank account signatories.
- Record or import account fee statements from banks.

Bank Statement and First Notice Reconciliation

Supports reconciling bank statement lines to operational transactions. The functionality provides the ability to:

- Create operational transactions using bank statement lines with first-notice rules.
- Configure matching rules to reconcile bank statement lines.
- Perform reconciliation of bank statement lines.
- Reconcile bank statement lines with a group of electronic payments.
- Record or import statements from banks.

Bank Statement Processing

Supports:

- Bank reconciliation.
- Extraction of business information from bank statements.
- Importing bank statement files in multiple formats.
- Worktag assignment.

Cash Positioning and Forecasting

Supports forecasting and managing cash inflows, outflows, and bank account balances. The functionality provides the ability to:

- Build cash forecast structures and models.
- Group cash activities.
- Record cash activities that originate outside Workday.

- Report on forecasted cash balances, payments, and receipts.

Manage Cash Transactions and Payment Requests

Provides the ability to create ad hoc bank transactions, payment requests, and bank account transfers. The functionality supports the:

- Initiation and settlement of transfers between bank accounts.
- Issuance of one-time payments.
- Recording of cash transactions and bank transfers executed outside of Workday.

Reference: Close and Consolidate Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Account Reconciliation

Provides the ability to certify the accuracy of account balances during period close and supports the decertification of previously certified accounts.

Consolidation Data Capture

Provides the ability to import trial balance data into Workday. The functionality supports the ability to:

- Cancel and correct summarized general ledger data.
- Manage summarized general ledger data and integration mapping.
- Upload summarized general ledger data from external sources.

Consolidations

Provides the ability to:

- Calculate noncontrolling interest (NCI) consolidation elimination entries.
- Create consolidated financial statements.
- Eliminate intercompany ledger accounts upon consolidation.
- Record equity earnings for subsidiaries and investments.
- Report on intercompany account reconciliation in elimination rule sets.
- Set up ownership details for companies that are part of company hierarchies.

Translation and Revaluation

Supports the calculation of currency fluctuations and creation of translation adjustment journals.

Reference: Endowments Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Donor and Donor Contributions

Provides the ability to:

- Identify individuals and corporations contributing gifts to endowments.
- Manage information about donors and donor-contributed gifts.

Endowment Payouts

Supports the ability to:

- Allocate income generated from investment pools.
- Record investment statements and payout percentages for investment pools.
- Reinvest pool payouts to acquire additional gift units.

Gifts

Provides the ability to:

- Create gifts and gift hierarchies, assign roles, and track gift activities.
- Transfer book values and units between gifts.

Investment Pools

Provides the ability to:

- Facilitate the sale of gift units.
- Purchase pool units using donor contributions.
- Record gains and losses from the sale of investment pool units.
- Track gifts and ownership within investment pool gift shares.
- Value pools based on current market prices.

Investment Statements

Provides the ability to record investment pool activity on investment statements.

Reference: Expenses Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Accounting Adjustments

Supports the reclassification of transaction lines to redistribute costs on operational transactions.

Corporate Credit Card Processing

Provides the ability to assign corporate, individual, and shared-liability credit cards to expense payees. The functionality also supports the processing, settlement, and payment of corporate credit card transactions.

Expense Approval

Supports the review and approval of submitted expense reports.

Expense Payment and Reimbursement

Provides the ability to set preferences for expense reimbursements.

Expense Protect

Provides the ability to use machine learning (ML) to streamline expense report reviews. The functionality provides the ability to:

- Evaluate real-time expanse risk assessments and recommend decisions.
- Match with the correct expense item and calculate the prediction accuracy.

Expense Reporting and Audit

Provides the ability to view and manage spend for organizations and workers.

Expense Transaction Processing

Provides the ability to manage the data types that can be associated with expense transactions. The functionality includes the ability to:

- Add credit card transactions on expense report lines.
- Link allowance plans to expense items.
- Report on intercompany expenses and settlements.

Expense via Natural Workspace

Provides the ability to submit expenses using 3rd party messaging platforms.

Receipt Capture

Provides the ability to manage expenses from:

- Benefit program reimbursements
- Corporate credit card programs
- Out-of-pocket receipts.

Request Travel Expenses

Supports the ability to create spend authorizations and cash advances for anticipated employee expenses.

Travel Booking

Provides the ability to:

- Integrate with 3rd party companies.
- Retrieve corporate travel booking data and map into Workday Expenses.

Reference: Grants Management Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Award Billing

Supports the ability to request reimbursement through invoice or letter of credit draw.

Award Budget

Provides the ability to budget for awards.

Award Cost Processing

Provides the ability to calculate rate-based indirect costs, revenue recognition, and billable items for cost-reimbursable expenditures.

Award Management

Provides the ability to record information about award contracts and manage that information throughout the life cycle of the contract. The functionality supports the ability to:

- Create and manage terms and conditions.
- Define rules to automate expenditure control, grant accounting, and reimbursement.
- Maintain award amendments.
- Manage award tasks and deliverables.

- Manage funding amounts.

Award Tasks and Milestones

Provides the ability to track required actions and grantor and sponsor deliverables for an award through approval routing, alerts, and attachments.

Effort Certification

Provides the ability to certify the effort of individuals.

Funding Sources

Supports the identification and prioritization of funding sources. The functionality supports:

- Reports for funding sources to review and verify the allocation of funds to transactions.
- Retroactive assignment of funding sources to transactions.
- The ability to set aside money for specific purposes.
- The application of a funding source to an existing reclassification entry.

Proposal Management

Provides the ability to record and track submitted award proposals and to create award contracts from successful proposals.

Sub-Award Management

Supports the management and tracking of costs, contacts, risks, and attachments related to award subrecipients.

Reference: Payment Processing Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Manage Checks

Provides the ability to print checks for settled payments, and:

- Create positive pay files for financial institutions.
- Escheat payments.
- Report on issued checks.
- Void checks.

Manage Payments

Supports the payment acknowledgement process, and provides the ability to:

- Create and send remittances.
- Record payments that banks have returned.
- Record stopped payments.
- Report on settlement activity.
- Send prenote transactions to validate electronic banking information.

Payment Integrations

Provides the ability to send and receive payment data through integrations that support various payment standards.

Payment Methods

Supports the configuration of payment types based on various payment methods.

Settle Payments

Supports settling unpaid open items and pending payments. The functionality provides the ability to:

- Configure cash balance checks.
- Make multicurrency settlement runs.
- Schedule settlement and prenote runs.
- Store bank details for creating and editing bank accounts.

Reference: Project Billing Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Project Billing - Core

Supports creating billing processes for client-facing billable projects. The functionality provides the ability to:

- Add administrative fees and attachments to invoices.
- Configure project milestones for billing and revenue events.
- Create billing schedules and installments.
- Log transactions against projects for expense reports, time blocks, and supplier invoices.
- Review project transactions for transaction sources.
- Transfer transactions between projects.

Project Billing - Pricing

Provides the ability to:

- Price projects using billing rates and billing rate rules.
- Use of effective dates on contract rates.

Project Billing - Revenue Recognition

Supports the ability to accrue and post revenue when transitions occur.

Reference: Project Tracking Capabilities

You can view a high-level feature description for the capability in this product area.

Project Tracking

Supports tracking work time against projects. The functionality provides the ability to:

- Create project hierarchies for roll-up reporting.
- Create resource plans to staff projects.
- Group time spent on projects.

Reference: Projects Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Capital Projects

Provides the ability to collect project costs and convert them into business assets.

Opportunity Projects

Supports the ability to plan future staffing and generate forecasts. The functionality provides:

- Business processes to convert opportunity projects into sold projects.
- The ability to report on opportunity projects.

Plan Work

Provides the ability to organize project work details. The functionality supports:

- Portfolios, project plans, and templates.
- Reporting on planned projects and resources.
- Allocating workers and worker groups to project plans.

Project Budget

Provides the ability to configure calculations from costs and revenue to create project budgets. The functionality supports:

- Baseline budget comparisons with budget forecasts.
- The ability to create and maintain budget templates.

Project Financial Reporting

Provides the ability to calculate ‘Project’ Financial Transaction Custom Report and Profitability Report Usage.

Project Staffing

Provides the ability to maintain and report on project staffing. The functionality supports:

- Reporting on worker availability and assignments.
- Skill acquisition tracking for workers as they complete projects.
- The ability to search project workers and projects.

Projects - Core

Provides the ability to configure, manage, and report on projects.

Projects - Transfer Pricing

Provides the ability to:

- Document details and pricing of business relationships between the legal entities of global organizations.
- Manage intercompany billable transactions.

Resource Cost Rate

Supports the configuration of labor cost rate with or without worker-sensitive information. The functionality provides the ability to:

- Generate ledger postings for labor cost summaries.
- Prorate project labor costs.

Resource Forecast

Provides the ability to create estimates for the number of hours that workers need to complete project work. The functionality:

- Generates forecasts from task resources and resource plans.
- Provides business processes that enable workers to update their project forecasts.

Resource Management

Provides the ability to:

- Plan resources before assigning workers.
- Specify requirements for project roles.
- Staff projects with qualified workers.
- Surface suggested project roles to workers and view interested workers when staffing projects.

Templates

Provides the ability to create and maintain project templates. The functionality supports:

- Prefilled options when creating projects, project plans, resource plans, and task resources.
- The ability to configure project roles and tasks based on project hierarchies.

Worker Utilization

Provides the ability to create and manage worker utilization rules and billable project reporting.

Reference: Revenue Management Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Billing

Supports multiple billing and schedule types and provides the ability to withhold a portion of customer invoices.

Customer Contract Management

Provides the ability to create and manage customer contracts. The functionality:

- Generates installments for deferred cost transactions.
- Provides the ability to create customer contracts through predefined templates.
- Supports multiple currencies in customer contracts.

Revenue Recognition

Provides the ability to generate and recognize revenue before or after billing. The functionality supports:

- Creating revenue schedules from customer invoices and revenue schedule templates.
- Regeneration of revenue recognition installments.

Revenue Recognition - Advanced

Provides the ability to create alternate customer contracts and revenue allocation rules. The functionality supports

- Accounting for revenue allocation on customer contracts.
- Adjustments in multiple currencies.

- Creation of sales item price lists and bundles.
- Reconciliation for deferred revenue on customer contract lines, and the adjustment of credit and debit balances in contract ledger accounts.
- The ability to relate multiple customer contracts to a single master contract.

Usage Billing

Provides the ability to:

- Manage minimum commitments, tiered pricing, and volume pricing.
- Record customer transaction usage and apply contractual pricing terms.

Workday Human Capital Management

Reference: Advanced Compensation Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Bonus Process Options

Provides the ability to define the:

- Earnings amount that's eligible for bonus pay.
- Time period associated with eligible earnings.
- Qualifying bonus plans.
- Deferred bonuses.

Compensation Administrator Tools

Provides the ability to:

- Monitor, manage, and report on compensation review processes.
- Configure critical and warning validations that surface in an in-progress compensation review process.

Compensation Matrices

Provides the ability to create and configure compensation matrices with various factors to determine merit increases, bonus targets, and stock grants.

Compensation Review Award Types

Supports multiple award types in the compensation process.

Compensation Review Calculate Targets and Manage Pools

Provides the ability to review calculated targets and manage award pools. The functionality supports:

- Merit pools based on the employees' merit targets or a configured amount.
- A configurable process period start date for each merit or bonus plan included in the compensation review.
- Proration rules.
- Recalculating pools and awards.
- Entering an achievement percent to rate the level of performance toward each goal within the selected compensation scorecard.

Compensation Review Eligibility

Supports configuring rules for managing a compensation eligibility waiting period, and making employees eligible for a review process based on multiple factors.

Compensation Review Mass Actions

Supports compensation review process mass operations. The functionality provides the ability to:

- Bulk update compensation process attributes and eligibility.
- Import and retrieve bulk compensation data.

Compensation Review Modeling and Planning

Provides the ability to:

- Create, share and track compensation review modeled information.
- Estimate the effects on bonus awards by processing compensation details as if from an actual review.
- Support bonus estimate scheduling settings to run future calculations.

Compensation Review Planner Experience

Provides the ability to:

- Initiate, manage, and complete compensation review processes for eligible workers.
- Validate the compensation review process dates.
- Configure currency options.
- Hide and show budgets.

Compensation Review Process Setup

Provides the ability to enable customers to populate settings in a compensation review process.

Compensation Review Statements

Provides the ability to:

- Create and manage compensation review statements.
- Release statements to managers and employees.

Coordination of Events

Provides the ability to manage employees, pools, and awards during parallel events.

Manage Compensation Plans

Provides the ability to manage merit, bonus, and stock plan setup, including proration rules, scorecards, targets and target visibility, and waiting periods.

Manage Compensation Review Process

Provides the ability to:

- Plan for and grant periodic merit, bonus, and stock awards for employees in a mass shared participation process.
- Enable groups to review the awards before finalizing the process.

Stock Process Options

Provides the ability to define:

- The earnings amount that's eligible for stock awards.
- The time period associated with eligible earnings.
- Qualifying stock plans.
- Stock allocations.

Reference: Asset Tracking Capability

You can view a high-level feature description for the capability in this product area.

Asset Reporting and Tracking

Provides the ability to manage and track organizational assets. The functionality supports:

- Tracking of assets with no accounting involved.
- Tracking and reporting on assets by location, cost center, worker, or organization.

Reference: Benefits Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Affordable Care Act Management

Provides the ability to notify full-time employees of their minimum healthcare coverage and report to the Internal Revenue Service.

Configurable Benefit Plans

Supports creating and configuring health, insurance, and retirement benefit plans, and healthcare savings and spending accounts. The functionality provides the ability to:

- Create and configure additional benefit plans that don't fit other coverage categories.
- Create various attributes to support managing benefit plans, including coverage targets, benefit providers, benefit credits, benefit surcharges, groups, and eligibility rules.

Dependents and Beneficiaries

Supports creating dependents and beneficiaries. The functionality provides the ability to:

- Create multiple relationship types.
- Designate a legal trust as a beneficiary.
- Track a dependent verification status.
- Create qualified domestic relations orders.

Management of Enrollment Events

Supports configuring multiple enrollment event types and associated rules. The functionality provides the ability to:

- Enroll new hires in benefit plans, and end benefits upon termination or loss of eligibility.
- Enroll for employee-initiated qualified life events and auto-generated events resulting from a staffing and eligibility change.
- Define the benefit enrollment period for a specific type of benefit event, and restrict an employee's ability to report the benefit event after the enrollment period has expired.

- Enroll on desktop and Workday-native mobile apps.
- Coordinate events to process potentially conflicting events while preserving existing enrollments.
- Create and configure open enrollment workflows and periods.
- Consolidate events when more than 1 benefit event is reported on the same day.
- Support benefit plan waiting periods.
- Support benefit coverage and deduction begin and end date rules.
- Support rules for evidence of insurability processing that defines levels of change allowed, guaranteed issue limits, and defaulting rules for coverage pending approval.

Medicare

Supports creating and tracking Medicare benefits. The functionality provides the ability to:

- Track coverage and enrollment information for employees, retirees, terminated workers, and dependents.
- Support coordinating benefits based on coverage to determine the primary and secondary payer on medical expenses.

Tracking COBRA Eligibility

Provides the ability to:

- Track employee and dependent eligibility.
- Integrate with a third-party COBRA provider.

Wellness Administration

Provides the ability to enter wellness information and change retirement contributions.

Reference: Career and Development Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Careers

Supports creation of talent, education and experience data that is actionable and viewable on a worker's professional profile. Provides historical transitions for a given job profile, indicating potential career opportunities for workers, and relevant learning opportunities. The functionality supports:

- Configuration of relocation and travel preferences.
- Creation and maintenance of job interest details.
- Creation of actionable and viewable talent, education, and experience data on a worker's professional profile.
- Creation of development items.

Mentoring

Supports the creation of various mentor types and matching workers with mentors. The functionality provides the ability to:

- Structure informal 1-on-1 relationships between workers.
- Create and maintain mentorship preferences.

Reference: Case Management Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Case Assignment & Routing

Provides the ability to route cases to teams, and assign cases to individuals.

Case Configuration

Provides the ability to:

- Create case types.
- Define service categories and service teams.
- Manage case solver visibility into service teams and cases.

Case Creation

Provides the ability to create cases for employees or non-employees.

Case Data Management

Provides the ability to scramble and purge case data.

Case Deflection

Provides the ability to suggest relevant articles, tasks, reports and learning content during case creation to help deflect cases.

Case List

Provides the ability to:

- Manage open or in-progress cases by the service team.
- View resolved or canceled cases.

Case Notifications

Provides the ability for employees to receive notifications about important updates on their case.

Case Reporting and Dashboard

Provides the ability to analyze case data to generate insights.

Case Resolution Workflow

Provides the ability to manage resolved cases through a business process.

Case View (case solver)

Provides the ability to:

- Update and manage case details.
- Add internal case notes to track the investigation.
- Reply to cases by attaching and sending articles, tasks, and local files.
- Share non-confidential cases with employees or users that are external to the case.

SLA Management

Provides the ability to define, display, and track service-level agreements.

Reference: Cloud Connect for Benefits Capability

You can view a high-level feature description for the capability in this product area.

Carrier/Vendor Integration

Supports healthcare enrollment data file types and integrations with third-party benefit providers for benefit enrollment management.

Reference: Cloud Connect for Human Capital Management Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

HCM Connectors - Account Provisioning

Supports extracting worker profiles and provisioning group assignments and sending them to an endpoint.

HCM Connectors - Affordable Care Act

Supports sending Form 1094-C and 1095-C data to the Internal Revenue Service. The functionality supports the ability to:

- Submit ACA tax data under the Affordable Care Act Information Returns Program.
- Retrieve status update messages from the Internal Revenue Service endpoint.
- Generate integration audit files to help troubleshoot integration errors.

HCM Connectors - Medicare Integrations

Supports the ability to submit Employer Voluntary Data Sharing Agreements with the Centers for Medicare and Medicaid Services. The functionality provides the ability to:

- Send and receive coordination of benefits request and response files.
- Send data for active and retired employees and their dependents.
- Receive Employer Group Waiver Plans drug coverage data.

HCM Connectors - Talent Acquisition

Supports multiple connectors with third-party vendors regarding assessments, background checks, and other talent acquisition services.

HCM Connectors - Worker Data

Supports the ability to use multiple connectors regarding worker data. The functionality provides the ability to:

- Extract, transform, and send worker data related to job profiles, job families, locations, organizations, positions, and other attributes.
- Automatically send employee income and employment data to Equifax for Work Number® verification services for your employees with U.S. government IDs. Income verification is only available for Workday Payroll for the U.S. customers.

Reference: Compensation Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Ad Hoc Compensation Changes

Supports managing compensation events independent of an organization's compensation review processes or job changes. The functionality provides the ability to:

- Propose and request stock grants.
- Request one-time payments, and ad hoc compensation assignments.

Compensation Analytics

Provides the ability to monitor and report on potential demographic pay equity issues.

Compensation Basis

Provides the ability to:

- Define estimated earnings for employee populations.
- Support customized configurations.
- Simulate changes in compensation that result from various HCM business processes.

Compensation Discovery Boards

Provides the ability to analyze and manage pay equity analysis, utilizing multiple HCM data sources that track current and historical employee data from compensation events.

Compensation Grade Step Progression

Supports providing specific monetary amounts within compensation grades or grade profiles to eligible workers. The functionality provides the ability to:

- Preserve employee step progression if they receive a pay increase tied to an effective date.
- Schedule automatic employee moves between steps.
- Notify administrators and managers about upcoming employee step progressions.

Compensation Grades & Profiles

Provides the ability to support configuration of compensation packages, compensation grades and compensation grade profiles.

Compensation in Staffing Transactions

Provides the ability to manage and track compensation events as part of staffing processes, and to autocomplete compensation steps that were approved during the hire and offer processes.

Compensation Survey Management

Supports storing and reporting on internal and external compensation survey data and benchmarks. The functionality provides the ability to:

- Maintain multiple survey vendors, products, and surveys.
- Store survey jobs and matches between surveys and job profiles.

Education and Government Compensation

Supports academic pay for workers who are considered full-time employees by their institution. The functionality provides the ability to:

- Create and maintain locality pay areas.
- Create period activity pay to compensate workers on configurable assignments in both academic and non-academic jobs.

Global Compensation Calculations

Provides the ability to create a compensation basis to manage employee compensation changes as a total compensation amount, and distribute the changes to the components included in the compensation basis.

HCM: Core Compensation

Provides the ability to set up and manage compensation for a global workforce.

HCM: Severance

Provides the ability to create and deliver severance packages to terminating employees, including configuration of notice periods, severance payments, and severance duration.

Manage Compensation Plans

Supports configuring various types of compensation plans to support compensation transactions and reporting.

Quality Step Increase

Provides the ability for managers to request an ad hoc one-time step progression compensation increase event.

Total Rewards Statement

Provides the ability to report on the compensation and benefits details that employees can access.

Wage Theft Prevention

Provides the ability to generate wage theft prevention notices to provide employees visibility.

Reference: Core Human Capital Management Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Compliance

Provides the ability to maintain and track establishment assignments, genders, and employment authorization. The functionality supports:

- Assigning an establishment to a worker, combining their legal entity and location.
- Creating, maintaining, and configuring specific fields for French and German establishments.
- Configuring country-specific genders for worker self-identification.
- Importing data from Form I-9, including Section 3, created outside of Workday.
- Correcting a completed Form I-9, including Section 3.
- Sending Form I-9 data to the U.S. Federal E-Verify service, and resync of case statuses.
- Hiding and requiring fields on Form I-9.
- Managing multiple Form I-9 business processes, including internal audit and form assignment management.
- Designating an external authorized representative to complete Section 2 of Form I-9.

Data Privacy and Purging

Provides the ability to manage the display of certain data and purge various worker data attributes. The functionality supports:

- Purging worker data and tracking the progress of the purge process.

- Replacing worker data with irreversibly scrambled data in implementation tenants.
- Deactivating and opting out of full National ID masking and configuring for partial National ID masking based on the National ID type.

Duplicate Management

Provides the ability to match, merge, and unmerge duplicate person records, and match exclusions to exclude records from duplicate detection.

Employee Talent Data Collection and Cards

Provides the ability to consolidate multiple tasks for managing talent data into a single-page career profile, and the ability to upload work experience and education information from a resume to a worker profile.

Employment Contracts/Employment Agreements

Provides the ability to record contract details for fixed-term and permanent employees. The functionality supports:

- Creating conditions of employment for internal and external candidates through job applications or job requisitions.
- Hiding and requiring fields.

Global Mobility

Tracks domestic and international assignment job details, including assignment type and expected assignment end date. The functionality supports the ability to:

- Configure country-specific genders for self identification.
- View, report, and maintain personal information, including security control, across multiple countries simultaneously.

Job Overlap on Position Restriction

Supports the ability to temporarily have 2 workers in the same position without a future vacating event.

Mass Processing Capabilities

Provides tooling for mass processing operations. The functionality supports the ability to:

- Automate termination and end contingent worker contract processes based on definable criteria.
- Mass hire workers using web services.
- Mass correct hire date and reason for multiple employees.
- Mass change jobs change and mass assign organizations assignment for workers.

Non-Employee Tracking

Supports managing and tracking non-employee workers. The functionality supports:

- Reporting and tracking on retired employees.
- Starting and ending contracts with contingent workers, including assigning workers to a position and various organizations.
- Hiding and requiring fields.

Position Management

Supports a position management staffing model that allows for defining separate hiring rules and restrictions for each position. The functionality supports the ability to:

- Track historical trends, retention risk data, and workforce planning.

- Create, maintain, and report on headcount plans.
- Hide and require fields on various headcount-planning tasks.
- Report on individual position budgeting, and group multiple position budgets into 1 budget for each plan structure and year.

Regulatory Reporting

Provides reporting to support Equal Employment Opportunity Commission (EEOC) compliance efforts, including data to support EEO-1, EEO-3, EEO-4, and EEO-5 reports. The functionality supports:

- Reporting to support the EEO-1 for multiple establishments.
- Reporting on gender and ethnicity for the previous 4 quarters and the current quarter.
- Tracking veteran status.

Safety Incident Tracking

Supports the ability to collect data and report on safety incidents.

Skills and Experience Attribute Tracking

Provides the ability to add, manage, and track accomplishments, experience, and skills attributes to a worker profile. The functionality supports:

- Creating, tracking, and adding specialties to professional certifications.
- Creating and tracking competencies, including rating scales.
- Defining competencies based on management level and compensation grade.
- Tracking awards, activities, educational history, job history, languages and proficiency levels, professional affiliations, publications, and trainings.
- Creating qualification equivalence rules for job profiles.

Unions / Collective Agreements

Provides the ability to:

- Assign collective agreements to workers.
- Record, report, and change collective agreement details.
- Process changes to a worker’s union membership.

Vaccine and Workplace Test Tracking

Provides the ability to add vaccination and workplace test events for a worker, and supports data and reporting to track vaccination and test events.

Worker Data Changes

Provides the ability to modify worker data attributes. The functionality supports:

- Looking up addresses by entering only a partial address for specific countries.
- Configuring address components by country.
- Modifying worker personal data attributes.
- Changing, deleting, or editing worker profile photos.
- Creating flexible work arrangements for hybrid work, including reporting on current, future, and ended arrangements.

Worker Staffing Changes

Supports the ability to manage a worker’s organizational movement. The functionality supports:

- Hiring or rehiring workers.

- Modifying the details of a worker’s job.
- Configuring templates that only display sections that are relevant for specific job change actions.
- Ending an employee’s relationship with an organization, voluntarily or involuntarily.
- Placing a worker with a primary job or position into an additional job or position.
- Auto-completing of multiple staffing processes initiated from Workday Recruiting.
- Configuring customized help text for specific fields on staffing processes.
- Hiding or requiring fields on staffing processes.
- Configuring, hiding, or requiring localized fields for countries.
- Creating reference letters for employees in real time.
- Selecting 2 or more workers and moving them into each other’s positions with a single transaction.

Reference: Journey Paths Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Administration

Supports web services.

Content Discovery

Provides the ability to view the status of journeys for recipients.

Journeys Curation

Provides the ability to edit configurations, view configurations, and view distributions for journeys.

Journeys Distribution

Supports the distribution of journeys to recipients and provides the ability to distribute or schedule journeys when sent to multiple recipients.

Journeys Metrics & Reporting

Provides the ability to view:

- Journey specific distribution and engagement metrics.
- In-progress list of all journeys, their versions and recipients.

Security

Provides the ability to manage journey categories.

Reference: Knowledge Management Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Access and Security

Provides the ability to create, manage and view a list of authenticated audiences.

Content Discovery and Consumption

Provides the ability to search and view articles.

Content Management

Provides the ability to create and edit articles.

Reference: Onboarding Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Compliance

Provides the ability to maintain and track establishment assignments, genders, and employment authorization.

E-Verify

Supports sending of Form I-9 data to the U.S. Federal E-Verify service. The functionality supports:

- Automatically resyncing case statuses.
- Tracking cases in E-Verify that were created for the employee in the last 30 days.
- Submitting a duplicate case reason with the Form I-9.

Employment Contracts/Employment Agreements

Provides the ability to record contract details for fixed-term and permanent employees. The functionality supports:

- Creating conditions of employment for internal and external candidates.
- Hiding and requiring fields on the business processes associated with employment agreements.

Form I-9

Supports the ability to create and manage electronic Form I-9s for workers, and maintain internal audit information. The functionality supports:

- Importing data from Form I-9, including Section 3, created outside of Workday.
- Correcting completed Form I-9, including Section 3.
- Hiding and requiring fields on Form I-9.
- Designating the external authorized representative to complete Section 2 of the Form I-9.
- Configuring multiple Form I-9 business processes, including internal audit and assignment of form management. manage form assignment.

Hire and Onboarding

Provides the ability to hire and onboard employees and workers to an organization. The functionality supports:

- Autocomplete of hire and change job staffing business processes initiated from Workday Recruiting.
- Configuring an onboarding experience for new hires.
- Tracking onboarding data, including tasks completed by the worker and remaining tasks.
- Correcting worker start date when correcting the hire business process.
- Reporting users who don’t show up on their first day of work, stopping downstream processes and integrations related to the hire.
- Duplicating pre-hires and former workers, and provides tooling to avoid creating duplicate records.

Probation/Notice Periods

Provides the ability to create, edit, extend, and track probation periods for employees. The functionality supports:

- Creating and maintaining country-specific probation period rules for employees based on configured criteria.
- Hiding and requiring fields on probation period tasks.

Reference: Org Studio Capability

You can view a high-level feature description for the capability in this product area.

Org Studio

Provides tooling to collaboratively visualize, plan, and approve reorganizations and implement the changes in Workday. The functionality provides the ability to:

- Mass review, edit, and process organization and workforce changes.
- Create, copy, edit, and archive designs to track and manage reorganization projects.
- Create positions and supervisory organizations, and inactivate organizations, as part of reorganization design projects.
- Propose changes to an organization’s workforce through various staffing processes as part of reorganization projects.

Reference: Performance Enablement Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Employee Reviews, Conversations, and Templates

Provides the ability to collaborate on and manage performance reviews and related conversations. The functionality supports:

- Check-ins for workers.
- Configurable review plan templates.
- Creating organization development plans.

Feedback and Recognition

Provides business processes for both requested and unsolicited feedback, and the ability to make feedback private or public.

Individual and Organizational Goals Alignment

Supports individual, manager, and organizational goals. The functionality supports creation and:

- Assignment of organization goals to a supervisory organization.
- Management of individual goals.

Reference: Talent Pipeline Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Succession Planning and Pooling

Provides the ability to create, manage, and evaluate succession plans for positions, job profiles, and worker pools to populate plans. The functionality supports:

- Creating values and tracking candidates for internal positions.

- Creating talent pools to track groups of employees beyond organizational boundaries.
- Creation of succession pools to track candidates for 1 or more job profiles.
- Succession readiness tracking and the ability to specify a candidate’s preparedness to move into a position.

Talent and Performance Calibration

Supports the ability to plot, view, compare, and adjust workers based on their talent and performance ratings. The functionality:

- Provides managers the ability to share and delegate calibration of workers to other managers or HR partners.
- Supports creation of calibration programs to define each aspect of calibration activity.

Workday Paradox

Reference: Apply and Schedule Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Conversational Apply

Supports the automation of candidate communication and data management throughout the talent acquisition process using conversational and traditional methods. This functionality provides the ability to:

- Build and manage conversations, content, and web tools, including landing pages and widgets, for the hiring process.
- Build integrations with selected third-party systems in the tech stack (for example, employee calendars and location tools like conference room bookings) using bi-directional functionality.
- Collect candidate data using conversational responses, secure forms, or traditional form fields.
- Enable candidates to input their job preferences and search for open and relevant jobs via a chatbot assistant.
- Follow up with customer users and candidates automatically based on upcoming or outstanding tasks.
- Help automate the progression of a candidate's application and communications based on collected data, hiring stage, or attributes.
- Maintain control over user access levels across the system.
- Provide integrated metrics and tracking for reviewing hiring process performance and candidate feedback.
- Support job advertising via QR codes and keywords.
- Support the creation of custom data attributes for relevant entities.
- Support employee referrals via text message.
- Utilize an assistant to respond to user and candidate frequently asked questions.

Conversational Career Site

Supports the creation, hosting, and management of a branded career site to attract and engage potential candidates. This functionality provides the ability to:

- Analyze performance metrics and traffic drivers for the career site.
- Design the visual layout and branding of the site.
- Display open jobs and relevant organizational content to candidates.
- Distribute open jobs to predefined external job boards.

- Facilitate navigation across the site on various devices, including mobile.
- Host and facilitate the maintenance of the underlying career site infrastructure.
- Manage site content, media, and language translations.
- Support search engine ranking of the career site.
- Conversational Career Site functionality - requires a separate services agreement with Workday for implementation.

Conversational Interview Scheduling

Supports the automation and management of the interview process, from initial scheduling to feedback collection, across various interview types and platforms. This functionality provides the ability to:

- Accommodate the review of job applications before advancing candidates to the interview stage.
- Build integrations with selected third-party systems in the tech stack (for example, employee calendars and location tools like conference room bookings) using bi-directional functionality.
- Collect and manage interview feedback from the hiring team.
- Manage various interview types (phone, in-person, virtual) from a centralized dashboard for the interview team.
- Provide certain relevant information to candidates and interview teams for upcoming interviews.
- Support automation of sending interview scheduling invitations and follow-up reminders based on job qualifications and workflow triggers.
- Support automation of the scheduling, rescheduling, and cancellation of various interview types, including multi-person, multi-day, panel, and sequential events.
- Support video interviews using preferred third-party platforms or the native video tool.

Hiring Team Experience

Supports the integrated management of job requisitions, candidate offers, and post-hire administrative tasks through automatable workflows. This functionality provides the ability to:

- Collect certain necessary data and documents for candidate onboarding and background checks.
- Build integrations with external systems to manage job requisition status.
- Provide a review layer for certain key recruiting documents.
- Support automation of the creation and delivery of candidate offers.
- Support the configuration of candidate volume limits per job requisition.
- Support the screening of job seekers using keyword-based text messages.

Reference: Conversational Applicant Tracking System (ATS) Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Applicant Tracking System

Supports the management and automation of the talent acquisition lifecycle, from job creation and candidate sourcing to interview scheduling, offer management, and initial onboarding. This functionality provides the ability to:

- Accommodate system-wide review layers for talent acquisition related documents, including new jobs and offer letters.
- Build integrations to job boards and referral systems.
- Facilitate candidate sourcing and application by managing the full job lifecycle (creation, editing, and distribution to career sites and general job boards) and supporting conversational application methods.
- Manage and track candidates as they advance through the pipeline, including moving candidates across jobs.

- Manage employment offers for all positions.
- Support automation of the progression of a candidate's application based on collected data and manage candidate volume limits per job.

Campus Events

Supports the planning, execution, and tracking of campus-specific hiring events and talent engagement strategies. This functionality provides the ability to:

- Capture and track candidate data using registration forms and event check-in.
- Leverage feedback from student evaluations and monitor attendance to measure ROI.
- Manage event logistics directly from a mobile device.
- Manage event planning and reporting using custom fields and attributes.
- Organize and manage school data using a database and central campus profiles.
- Support pre-event and on-site registration via web, chat, or text.

Conversational Apply

Supports the automation of candidate communication and data management throughout the talent acquisition process using conversational and traditional methods. This functionality provides the ability to:

- Build and manage conversations, content, and web tools, including landing pages and widgets, for the hiring process.
- Build integrations with selected third-party systems in the tech stack (for example, employee calendars and location tools like conference room bookings) using bi-directional functionality.
- Collect candidate data using conversational responses, secure forms, or traditional form fields.
- Enable candidates to input their job preferences and search for open and relevant jobs via a chatbot assistant.
- Follow up with customer users and candidates automatically based on upcoming or outstanding tasks.
- Help automate the progression of a candidate's application and communications based on collected data, hiring stage, or attributes.
- Maintain control over user access levels across the system.
- Provide integrated metrics and tracking for reviewing hiring process performance and candidate feedback.
- Support job advertising via QR codes and keywords.
- Support the creation of custom data attributes for relevant entities.
- Support employee referrals via text message.
- Utilize an assistant to respond to user and candidate frequently asked questions.

Conversational Career Site

Supports the creation, hosting, and management of a branded career site to attract and engage potential candidates. This functionality provides the ability to:

- Analyze performance metrics and traffic drivers for the career site.
- Design the visual layout and branding of the site.
- Display open jobs and relevant organizational content to candidates.
- Distribute open jobs to predefined external job boards.
- Facilitate navigation across the site on various devices, including mobile.
- Host and facilitate the maintenance of the underlying career site infrastructure.
- Manage site content, media, and language translations.
- Support search engine ranking of the career site.
- Conversational Career Site functionality - requires a separate services agreement with Workday for implementation.

Conversational CRM

Supports the continuous sourcing, engagement, and management of job seekers and leads through automated, personalized, and multi-channel campaigns. This functionality provides the ability to:

- Collect and track data from job seekers for candidate relationship management.
- Manage leads, including status movement, via web, native app, or browser extension tools.
- Notify candidates automatically about new open roles based on their indicated preferences.
- Provide personalized content and conversations to leads to help keep their data updated.
- Send single and drip campaigns to different lead personas through communication channels (for example, email, SMS, or other supported communication channels).
- Support a two-way exchange of candidate and activity data with preferred professional sourcing platforms via native integration.

Conversational Events

Supports the creation, management, and execution of both in-person and virtual hiring and orientation events. This functionality provides the ability to:

- Automate event interview reminders and calendar invites for both candidates and users.
- Create and manage a knowledge base for event-specific questions to help automate answers to event specific questions from attendees.
- Create and manage physical and virtual experiences for hiring and new hire onboarding and orientation.
- Enable candidates and attendees with self-service options to reschedule or cancel event interviews automatically.
- Leverage the native video interviewing tool to conduct virtual interviews at events.
- Manage high volume events by using event segments.
- Provide an event dashboard to view all upcoming events and important information.
- Tailor the candidate's event registration process to collect specific information.
- Templatize event logistics in the system to scale event programs.
- Track candidate attendance.
- Use dedicated landing pages, phone numbers, keywords, and QR codes to help streamline promotion, registration, and facilitation of events.

Conversational Interview Scheduling

Supports the automation and management of the interview process, from initial scheduling to feedback collection, across various interview types and platforms. This functionality provides the ability to:

- Accommodate the review of job applications before advancing candidates to the interview stage.
- Build integrations with selected third-party systems in the tech stack (for example, employee calendars and location tools like conference room bookings) using bi-directional functionality.
- Collect and manage interview feedback from the hiring team.
- Manage various interview types (phone, in-person, virtual) from a centralized dashboard for the interview team.
- Provide certain relevant information to candidates and interview teams for upcoming interviews.
- Support automation of sending interview scheduling invitations and follow-up reminders based on job qualifications and workflow triggers.
- Support automation of the scheduling, rescheduling, and cancellation of various interview types, including multi-person, multi-day, panel, and sequential events.
- Support video interviews using preferred third-party platforms or the native video tool.

Hiring Team Experience

Supports the integrated management of job requisitions, candidate offers, and post-hire administrative tasks through automatable workflows. This functionality provides the ability to:

- Collect certain necessary data and documents for candidate onboarding and background checks.
- Build integrations with external systems to manage job requisition status.
- Provide a review layer for certain key recruiting documents.
- Support automation of the creation and delivery of candidate offers.
- Support the configuration of candidate volume limits per job requisition.
- Support the screening of job seekers using keyword-based text messages.

Workday Payroll

Reference: Cloud Connect for Third Party Payroll Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Auditing

Provides the ability to:

- Search for changes from the primary payroll integration runs that match certain criteria.
- Configure and reconcile payroll-related information between Workday and third-party payroll systems.
- Manage and track errors returned by a third-party payroll system for worker changes.

External Documents

Provides the ability to upload documents from an external system into Workday, and purge documents for both active and terminated employees.

Inputs to Payroll

Provides the ability to enter earnings and deductions for inclusion in payroll processing that aren't part of regular compensation or benefits.

Payroll Worker Data

Provides the ability to:

- Enter data changes in Workday.
- Capture and output worker data changes, in order of occurrence, within an effective range.
- Import external payroll documents into Workday.
- Import external payroll results.

Payslips

Provide the ability to import payslips from an external system into Workday.

Reporting and Analytics

Provides the ability to:

- Import payroll results from third-party payroll systems.
- Give employees visibility into their pay within Workday.

- Analyze external payroll results from both third-party systems and Workday payroll in a single report.

Streamlined Integrations to Third Party Payroll Providers

Provides the ability to:

- Capture and output worker data changes in order of occurrence, within an effective range, including changes on a single day.
- Specify the time to send relevant information to a third-party payroll system for a new hire.
- Define groups of employees, what payroll changes to include, extract the data changes and send them to third-party payroll systems at scheduled intervals.
- Send new hire and termination information to a third-party payroll system.
- Merge output files from multiple integration runs and send a single output file.
- Run ad-hoc integrations.

Reference: Core Payroll Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Note: Not all Payroll features are available in all countries, depending on local requirements and conditions.

Auditing

- Provides information to help verify payroll configuration against Workday recommendations and troubleshoot performance issues.
- Supports payroll audits and provides information about audit exceptions.
- Provides the ability to configure alerts and audits.

Configurable Calculations/Engine

Provides the ability to create numeric, boolean, and date calculations that work with Workday Payroll calculations, including:

- Pay component groups.
- Pay accumulators and balances.
- Earnings and deductions.

Configurable Framework

Provides the ability to:

- Build interactions with external data and grant custom applications access to Workday.
- Group workers and pay components for payroll and retro processing and reporting.
- Map codes from a prior external payroll system to Workday codes.

Employee Mobility

Provides the ability to process payroll for a mobile workforce, including:

- Workers on international assignment into the U.S. or Canada.
- Workers in the U.S. or Canada who have multiple jobs.
- U.S. workers who work in different tax jurisdictions.

Note: Not available for Payroll for France and Payroll for the UK.

End Payroll Inputs for Terminated Workers

Provides the ability to stop ongoing payroll inputs to terminated workers.

Inputs to Payroll

Provides the ability to create manual one-time or ongoing earnings or deductions.

Mid Period Changes

Provides the ability to prorate pay components and related calculation amounts in each subperiod resulting from a mid period change.

Net Pay Validation and Arrears

The functionality supports:

- Defining a minimum net amount to pay workers.
- Defining deduction priorities and handling of arrears tracking and recouping.
- Recouping arrears from prior pay periods in the next available result where there are sufficient wages to withhold from.
- Ensuring minimum net pay and arrears rules are respected.

Note: Not available for Payroll for France.

Pay Cycle Management

The functionality provides the ability to:

- Access tasks and reports to process payroll.
- Specify the sequence of payroll processing tasks and the roles responsible for their completion.
- Analyze pay results, isolate a subset of results based on common similarities, and take action on the results.

Payments

Manage payments and one-time or recurring deductions and earnings for workers.

Payroll Compliance

The functionality delivers:

- A preconfigured profile of Workday-delivered and -maintained statutory information and sample configurations.
- A Payroll Compliance dashboard that displays weekly compliance-related updates

Payroll Worker Data

The functionality supports:

- Loading records of payments made to workers before using Workday Payroll.
- Mass loading pay group assignments.
- Loading payment and tax elections.

Payslips

Provides the ability to track common payroll information and model hypothetical changes to an existing pay result.

Note: Not available for Payroll for France and Payroll for the UK.

Reporting and Analytics

The functionality supports:

- Generating configurable reports for pay periods and balance periods.
- Creating configurable field definitions for reports.
- Defining which audiences can access payroll results.

Retroactive Changes

The functionality supports:

- Recalculating pay results in prior periods when workers have retroactive changes, and paying the differences in the current pay period.
- Configuring earnings and deductions to ignore when running retro pay calculations.
- Creating off-cycle payments for a selected group of workers to pay retro differences.

Streamlined / Automated Calculations

The functionality supports:

- Automated payroll processing for regular run categories.
- Limiting payroll calculations based on result status, pay-impacting events, or a set of workers.
- Issuing additional payments, paying retro differences, and replacing a worker's regular on-cycle pay before their next pay cycle.
- Enabling decentralized processing of final payments to terminated workers.

Year End

Access reports related to year-end tax reporting.

Note: Not available for Payroll for France.

Reference: Global Payroll Connect Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Note: All capabilities indicated in Reference: Cloud Connect for Third Party Payroll Capabilities are also included in Global Payroll Connect.

Additional Payroll Data

Callback for External Payroll

Data Changes on Demand

Provides the ability to:

- Enable employees and payroll practitioners to enter and edit country-specific payroll data that is required for payroll processing but not natively supported by Workday within our platform.
- Display the payroll data provided by the payroll vendors and support data validation errors.

Provides the ability to send a callback message to your third-party payroll vendor when Workday completes an import of data from external payroll documents or external payroll results.

Provides the ability to make requests for payroll interface pay groups on demand from Workday to your third-party payroll systems with a REST API that efficiently detects and retrieves field-level changes within third-party pay groups. Data Changes on Demand enables you to:

- Query for data on entire pay groups or individual workers.

- Specify data sections or extract values for specific fields.
- Submit data requests and receive notifications upon job completion.
- Retrieve results as structured JSON documents via the API.

Event Outbound Notifications

Provides the ability to send notifications to third-party payroll systems when there's a hire or a termination event, enabling your third-party payroll system to learn when to request that data from Workday.

Inbound Notifications

Provides the ability to notify specific workers or organization recipients in Workday with custom messages, such as simple text messages or specific feature notifications that can be tailored for multiple use cases, including Workday required actions, and vendor-supported actions.

Global Payroll Hub

Provides the ability to:

- Monitor and manage external payroll content through Workday.
- View payroll processing status across different pay groups and countries.
- Configure and reconcile payroll-related information between Workday and third-party payroll systems.
- Drill down into the details of a pay group's processing, including variance analysis.
- Perform vendor-supported actions.
- Manage and keep track of your third-party payroll processing progress and statuses.

Reference: Payroll Accounting and Payslips Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Note: Not all Payroll features are available in all countries, depending on local requirements and conditions. Example: French requirements related to payslip information, retention, and access.

Accounting Flexibility

Provides the ability to:

- Configure account posting rules, associated with a company, to direct where transaction journals post in the company ledger accounts.
- Override the accounting date for a period. Include pay types for payroll accounting adjustments.
- Generate reversal journals when canceling pay results.
- Specify how to allocate employee earnings and employer-paid expenses to costing organizations and locations.
- Exclude negative results from employer-paid expense costing. Assign costing allocations for employer-paid expenses.
- Cost applicable employer-paid expenses to a worker's organization.
- Use forward accruals to create an estimated payroll accrual and fringe benefit, based on proration of a payroll result.
- Identify earnings on journal lines that relate to fringe benefits for payroll commitments.
- Cost payroll expenses to multiple related companies.
- Consolidate payroll journals before sending results to the ledger.
- Automatically split accounting entries when cost allocations change midperiod.
- Enter adjustments to modify payroll journal lines on a completed result.
- Create validations to prevent or warn users from submitting costing allocations with invalid details.

- Automatically apply costings from a retro payroll period.
- Define attributes for salary caps so that payroll expenses don't exceed specified maximum costing values on sponsored awards.

  Note: This feature requires Workday Grants Management.

Commitments / Obligations / Budget Checking

Provides the ability to:

- Project fiscal-year compensation and fringe benefits for filled and unfilled positions.
- Report on budgetary balances to compare position budgets against commitments, obligations, actuals, and remaining balances.
- Control how Workday prorates commitments, obligations, and related fringe for periods crossing a fiscal year.
- Define percentage brackets for the fringe benefit portion of payroll commitments and obligations.
- Estimate fringe benefit expenses, through the end of a financial reporting period, when a payroll period spans multiple reporting periods.
- Include forward accrual and reversal in a budget check.
- Create and process commitments for up to 5 future fiscal years.
- Initiate payroll commitments, for filled and unfilled jobs, in the fiscal year.
- Set up rules for when Workday generates commitments for filled and unfilled positions.

Grants

Provides the ability to indicate how to manage grants within a processing pay period and follow grant sponsor guidelines for workers paid on grants.

Note: This feature requires Workday Grants Management.

Payments

Provides the ability to:

- Reconcile bank statements against a matching item in an account record.
- Manage payments and one-time and recurring deductions for workers.
- Escheat uncashed or unclaimed manual or check payments.
- Display customized help text for payment election fields.
- Enable employees to create and edit their payment elections options on a desktop or mobile device.
- Accept numerous different currencies to settle payments, and settle payments using multiple currencies.
- Set error or warning messages on specific payment conditions.
- Add payment elections as an action step to collect bank information from new users.
- Define payment options for users to set their preferred country, currency, payment type, payment method, and distribution options.
- Define payment election rules, for additional countries or currencies, for international workers.
- Enable employees to create and edit their payment election options.
- Export payroll data from Workday to an external check printing or payment service.
- Send details of checks issued, to a financial institution, for fraud prevention purposes.
- Preauthorize bank accounts by verifying account and routing information.
- Use a dashboard as a single place to access reports related to account settlement.
- Create settlement runs to settle unpaid open items and pending payments.
- Supports secure updates by requiring users to verify existing bank details before modifying payment elections or bank information.

Payslips

Provides the ability to:

- Combine payslips for a worker with multiple jobs across related companies.
- Create a dashboard of payslip information for employee use.
- Add and modify messages to display on printed payslips.
- Override a worker's current payslip delivery method.
- Provide workers with a digital PDF copy of their payslips.
- Generate a single PDF file containing multiple payslips.
- Schedule a time to print PDF payslips in bulk.
- Use preformatted layouts for checks and advice slips.

Provides the ability to customize:

- Advice slips.
- Checks.

  Note: Not supported in Payroll for the UK.
- Payslips.

Provides the ability to grant employee access, on a mobile device, to:

- Access a digital PDF copy of their payslips.
- View details of their current and year-to-date pay.
- View their pay information as tables and graphs.

Period Activity Pay

Supports paying employees for activities they perform during a fixed period.

Salary Over The Cap

Provides the ability to set a limit on payroll expenses so they don't exceed sponsor salary over the cap requirements.

Note: This feature requires Workday Grants Management.

Reference: Payroll for Australia Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Casual Employees

Provides the ability to identify workers as casual, and log their time type as variable.

Income Withholding Orders

Provides the ability to record and maintain deductions from workers' pay relating to withholding orders.

Payments

Provides the ability to process payments to workers using the Australian Banking Association (ABA) file format.

Payroll Worker Data

Supports configuration of worker data for payroll processing and tax filing, including employee self-service for withholding election forms.

Regulatory Reporting

Provides the ability to send payroll data to the ATO using Single Touch Payroll (STP). This includes reportable fringe benefits amounts (RFBA).

Superannuation

Provides the ability to:

- Calculate workers' superannuation eligibility.
- Enable workers to make superannuation fund choices.
- Send superannuation payments and data to superannuation funds using SuperStream.
- Set up maximum superannuation contribution base (MSCB) rules.
- Support employer's obligations for superannuation.
- Track superannuation payments to workers.

Taxes

Provides the ability to:

- Calculate regular tax.
- Calculate study and training support loans (STSL) repayments.
- Calculate taxes for bonuses, commissions, and back pay.
- Calculate upward variation tax.
- Record workers' tax declarations.
- Support employer's obligations for taxation.

Reference: Payroll for Canada Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Employee Mobility

Provides the ability to configure criteria that determines which position to use on pay results, payslips, and the default position for taxation and costing for workers with multiple jobs in Canada.

Income Withholding Orders

Enables withholding order and fee amounts from a worker’s pay due to family maintenance, federal and provincial tax levies, garnishments, and wage assignment.

Payroll Worker Data

Supports configuration of worker data for payroll processing and tax filing, including employee self service for withholding election forms.

Regulatory Reporting

Enables reporting on federal, provincial, and territorial tax remitting data for companies and payroll account numbers.

Statutory Holiday

Provides the ability to calculate statutory holiday earnings and hours based on federal, provincial, and territorial statutory requirements.

Note: This feature requires Workday Time Tracking.

Streamlined and Configurable ROEs

Provides the ability to:

- Create and edit Records of Employment (ROE).
- Configure event processing.
- Integrate with Service Canada and upload issued ROEs.

Taxes

Provides the ability to withhold a worker's statutory deductions directly from their pay using government agency rates.

Year End

Provides the ability to create, audit, and process supported year end tax forms, and enable workers to view and print their forms.

Reference: Payroll for France Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

DSN

The functionality provides the ability to:

- Support the production of monthly Déclaration Sociale Nominative (DSN) reports, based on worker data and monthly payroll results.
- Support machine to machine integration to send DSN submissions to the net-entreprises.fr portal.
- Report details about Obligation d'emploi des travailleurs handicapés (OETH) on a yearly basis.
- Add URSSAF contributions in DSN reporting without having to calculate contribution amounts individually for each worker.
- Support overriding of the version of the DSN technical specifications on a DSN before submitting it to net-entreprises.fr.
- Cancel and replace multiple DSNs.
- Import certain comptes rendus métiers (CRM) messages.
- Report contrats de travail à durée déterminée d'usage (CDDU) termination information for derogation tracks.
- Adjust or add data to a DSN report.
- Report items in the DSN, such as, stock options, free shares, workers starting or returning from an absence, workers paid in tips, terminated workers, and Numéro technique temporaire (NTT) information for workers without a social security number.
- Report on company aggregated values, establishment payroll contribution calculations and benefit amounts, and data and results that don't meet the DSN technical requirements.

Income Withholding Orders

Provides the ability to:

- Record and maintain deductions relating to a worker's withholding orders.
- Generate reports to identify and verify withholding order details.

Loans and Advances

Provides the ability to:

- Manage workers loans and advance requests, payments, and repayments.

- Support worker self-service loan and advance requests.

Payments

Provides the ability to pay workers through Single Euro Payments Area (SEPA) transfers.

Payroll Processing

Provides the ability to:

- Support the gross up of indemnités journalières de sécurité sociale (IJSS) payments based on net amounts entered.
- Calculate the tax and contribution limits for a variety of termination allowances.
- Support the proration of payroll results in response to specific French payroll events.
- Manage termination allowances at the end of a fixed-term contract.
- Refund workers for a percentage of their public transportation card costs.
- Support the calculation of mileage-based commuting allowances.

Reporting and Analytics

Provides the ability to:

- Create journal reports that assist when searching for errors and anomalies in workers' payroll results for companies and establishments.
- Report on salary taxes to help complete monthly and yearly form submissions.
- Support a standard payslip layout in accordance with the French clarified payslip model.
- Verify payroll results for multiple workers in a format based on the payslip configuration.

Taxes

Provides the ability to:

- Support calculations for contributions and taxes such as URSSAF contributions, AGIRC-ARRCO retirement contributions, and Pôle Emploi unemployment contributions, for both employer and employee.
- Withhold worker income taxes using either a rate from the Direction Générale des Finances Publiques (DGFIP) or a neutral rate.
- Retrieve income tax withholding rates from the DGFIP.
- Report on income tax withholding rates for a group of workers, salary tax details for each pay period, and aggregated salary tax amounts by each sector for a company.
- Manage tax calculations for employee or employer participation in Plan d'Epargne pour la Retraite Collectif (PERCO and PERECO) plans.

Reference: Payroll for the United Kingdom Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Auditing

Provides the ability to:

- Identify new workers without tax or National Insurance information.
- Identify period differences that may need correction.
- Support the review of errors or warnings from HMRC for RTI Full Payments Submissions.
- Support the tracking of apprenticeship levy amounts

Company Relationships

Provides the ability to record HMRC and RTI details for companies operating under the same UK Employer Reference.

Court Orders

Provides the ability to record and maintain deductions relating to a worker's court orders.

Employee Mobility

Provides the ability to transfer workers inside or outside a UK Employer Reference at the start of the period.

Gender Pay Gap

Provides the ability to identify pay and bonus information for gender pay gap reporting.

Payments

Provides the ability to:

- Support the import of bank payment acknowledgement files for electronic payments in the ISO20022 format
- Support the standard UK BACS system.
- Track National Insurance contributions for termination awards and sporting testimonials.

Payroll Worker Data

Provides the ability to:

- Record company car data and pass it to HMRC.
- Support a business process to assign a Payroll ID to workers.

Pension

Provides the ability to:

- Notify workers at key events during the enrollment lifecycle.
- Support the automatic enrolment of eligible workers into a pension scheme.

Regulatory Reporting

Provides the ability to:

- Create reports that assist when reconciling HMRC payments.
- Record workers who come under IR35.
- Support a business process to streamline EPS and FPS submissions to HMRC.
- Support the processing of HMRC notifications to obtain the latest worker tax details.

Statutory and Company Leave

Supports several statutory leave and pay types. The functionality provides the ability to:

- Calculate and pay statutory adoption, maternity, parental bereavement, paternity, shared parental, and sick pay for eligible workers.
- Estimate statutory maternity pay in weeks for workers who will be taking maternity leave.
- Offset a worker's Statutory Sick Pay against any company, contractual, or occupational sick pay provided.
- Support the recording of statutory sick pay history from external payroll systems.

Statutory Holidays

Provides the ability to:

- Calculate a worker's holiday pay.
- Load and augment historical holiday pay from external payroll systems.

Student Loans

Provides the ability to include student and postgraduate loan deductions in workers' payroll calculations.

Taxes

Provides the ability to:

- Support Employee and Employer Class 1 NI contributions.
- Support employer's statutory obligations for Scotland, Wales, and other UK tax regimes.
- Uplift workers' tax codes and clear down any existing week 1 or month 1 entries as part of the start of the new tax year.

Year End

Provides the ability to:

- Generate P45, P60, and associated postal address forms.
- Support customers to complete their statutory duties.

Reference: Payroll for the United States Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Company Relationships

Provides the ability to:

- Continue payroll and tax reporting in a new company after a merger or acquisition.
- Produce consolidated financial statements for companies in a single legal entity.
- Pay employees across companies where one is designated as the common pay agent or common paymaster.

Effort Certification

Enables the validation of payroll effort expenditures to help comply with requirements for maintaining records that accurately reflect the work performed on federally sponsored agreements.

Employee Mobility

Provides support for employees working in more than one location, including:

- Allocating worker-level percentages to multiple work jurisdictions.
- Assigning earnings to specified work locations and taxing authorities.
- Configuring a default position for taxation for a worker with multiple jobs.

FLSA

Provides the ability to process overtime pay requirements as established by the Fair Labor Standards Act (FLSA) and state-level rules in order to pay employees for overtime hours, including calculating regular rate, overtime premiums, and incorporating bonus payments.

Income Withholding Orders

Enables withholding from a worker's pay for the following types of orders:

- Bankruptcy
- Creditor garnishment
- Federal administrative wage garnishment
- Federal student loans
- Federal tax levy
- State tax levy
- Wage assignment
- Support order amounts

Payments

Provides employees the ability to request and receive payment for earned wages prior to the regular payment date for the pay period.

Payroll Worker Data

Supports configuration of worker data for payroll processing and tax filing, including employee self service for withholding election forms.

Regulatory Reporting

Provides reports for viewing and sending periodic and quarterly tax filing data to third party tax filing services at worker and company levels.

Taxes

Provides the ability to configure federal, state, and local employee and employer payroll tax rates and limits.

Third-Party Sick Pay

Supports recording sick pay payments and taxes withheld from a third party.

Tips

Supports configuring tip earnings for different tax treatment and reporting for uncollected taxes.

Work Study

Provides the ability to assign and manage standard work-study funding for students.

Year End

The functionality provides:

- Reports and processes for viewing W-2 data and creating employee forms.
- The ability for employees to view and print tax forms through self-service.
- Integrations with tax filing service providers to support agency requirements.

Workday Peakon Employee Voice

Reference: Peakon Administration Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Access Control Groups

Supports the management of user group access and feature permissions.

Account Management

Supports the management of company and data visibility settings.

Administration Localization

Provides dashboard and survey translation in supported languages.

Attributes Management

Supports the management of employee attributes and segments.

Authentication

Supports user authentication on Peakon.

Context Switching in Peakon

Provides the ability to select and display segment dashboards.

Data Retention and Confidentiality

Provides data protection and confidentiality.

Employee Management

Supports the management of employee records.

Integrations

Supports the management of integrations between Peakon and other tools. The functionality provides the ability to:

- Import employee records from supported human resources information systems.
- Import employee records from Workday.
- Integrate single sign-on between Peakon and external providers.
- Send survey notifications on business communication tools.

Public APIs

Provides the API token to extract survey data into business intelligence tools.

Reference: Peakon Analysis Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Attrition Prediction

Estimates voluntary resignation risk for the selected demographic groups.

Curated Insights

Provides a survey results summary across all question sets.

Cards

Provides the ability to display engagement, values scores, participation and benchmarks at a segment level.

Data Visualization

The functionality provides the ability to visualize data and information.

Employee Experience Cycle

Displays survey score comparison across standardized employee tenure phases.

Heatmap

Provides the ability to compare survey scores across different demographic groups.

Impact Analysis, Driver Impact

Calculates impact between question scores and other metrics.

Manager Usage Metrics

Provides a report on manager dashboard activity.

NPS, Benchmarks, True benchmark

Provides the NPS score and difference from benchmark.

Search

Provides the ability to search and select different demographic groups.

Sensitive Comments

Highlights comments that contain sensitive keywords and notifies authorized users.

Survey Participation

Displays survey participation insights.

Topics

Provides the ability to use natural language processing (NLP) to highlight comment topics.

Reference: Peakon Improve Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Actioning Functionality

Supports the creation and management of action plans.

Acknowledgements

Provides the ability to respond to a comment with a standard reaction.

Email Notifications and Notification Center

Provides timely email notifications and displays in-product notifications.

Micro Courses and Company Resources

Provides the ability to use and upload learning content.

Priorities, Suggested Priorities, and Strengths

Displays the drivers that are priorities or strengths, and provides the ability to manage driver priorities.

Reference: Peakon Insights Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Confidential Two-Way Conversations

Supports confidential conversations between survey participants and authorized users.

Manager Dashboard

Supports managers with the survey results of their team or managed area.

Personal Dashboard

Provides survey participants with access to their own survey results.

Powerpoint Presentations

Provides the ability to export dashboard summaries.

Shareable Dashboard

Provides approved users with the ability to share a simplified version of their dashboard.

Reference: Peakon Listening Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Listening Access Control Groups

The functionality provides ability to:

- Manage branding capabilities.
- Manage custom consent functionality.

Mobile App-Survey Experience

Provides the ability to interact with surveys using the mobile application.

Survey Algorithms

Supports the ability to rotate and distribute survey questions.

Survey Experience on All Channels

Supports the ability for survey participants to provide survey responses and self-select demographic attributes in surveys.

Survey Question Management

Supports the ability to manage custom and standard survey questions.

Survey Schedule Management

Supports the creation and management of surveys and survey settings.

Values Management

Provides the ability to ask questions about company values.

Workday Platform and Product Extensions

Reference: Bring Your Own Key

You can view high-level feature descriptions for the capabilities in this product area.

Customer Control of Root Encryption and Disaster Recovery Keys

Provides the ability to create and manage root encryption and disaster recovery keys for supported Workday applications in applicable regions, and provides the ability to rotate the root encryption and disaster recovery keys on demand or according to a customer configured schedule.

Reference: Media Cloud Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Media Consumption

Provides the ability to play media content. This functionality provides the ability to:

- Adjust playback speed and video quality.
- View video captions.
- View and search through the video transcription.
- Interact with questions through answers (Workday Learning only).

Media Creation

Provides the ability to create, store, and upload media content. This functionality provides the ability to:

- Upload and download media files.
- Manage access to media files.
- Autogenerate, upload, download, and remove caption files.
- Preview and save content before publishing.
- Share media files.
- Add video interaction elements in a video (Workday Learning only).
- Limit question attempts for quizzes (Workday Learning only).
- Prevent skipping forward through a video (Workday Learning only).
- Add a minimum passing score for quizzes (Workday Learning only).

Media Insights and Analytics

Provides the ability to track the percentage of a video watched and completed in Workday Learning.

Media Integrations

Provides the ability to embed media content across certain Workday applications.

Reference: Messaging Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

SMS for Custom Business Process Notifications

Provides the ability to leverage SMS for custom notifications on any business process in the Workday tenant.

SMS for Recruiting Candidate Communications

Provides the ability to send external and internal candidates SMS messages as part of the recruiting process.

Reference: Workday Extend Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Workday Extend

Provides a platform to deploy apps and app components to extend core Workday features.

Workday HiredScore

Reference: HiredScore AI for Recruiting

You can view high-level feature descriptions for the capabilities in this product area.

Spotlight

Related Features	Description
Candidate Grading	Provides a means of prioritizing candidates based on comparison of job requirements and candidates resumes.

Recruiter Productivity

Related Features	Description
My Reqs	Provides a dashboard that displays the job requisitions assigned to a recruiter to support requisition management.
Trigger Candidate Movement	Provides the ability to advance or reject candidates individually or in bulk based on their job application status.
My Stats	Provides these recruiter performance and Fetch adoption metrics: • Percentage of requisitions open beyond 60 days. • Pending Fetch recommendations. • Percentage of unviewed Fetch recommendations. • Percentage of candidates in new status for 7 days.
Pending Actions	A dashboard displaying the various stages of candidates across all assigned requisitions.
Smart Candidate Profiles	Provides AI-driven insights on candidates based on their responses to application questions and cross-system data.
Adoption Reporting	Provides insights on HiredScore adoption and Fetch conversion metrics.
Global Implementation	Provides AI-driven support for job application business processes in 70 languages.
UI Language Translation	Provides translation for HiredScore Recruiter Interface in these languages: 1. Chinese (Simplified) 2. English 3. French (Canada) 4. French (France) 5. German 6. Japanese 7. Portuguese 8. Spanish
Configurable Insights	Supports selection of additional insight fields for candidate profiles.

Related Features	Description
Configurable Columns	Supports selection of additional columns for the requisition list, the Candidate Inbox, or the Pending actions dashboard.
Configurable Filters	Supports selection of additional filters for the requisition inbox, the Candidate Inbox, or the Pending Actions dashboard.

Fetch

Related Features	Description
ATS Fetch	Provides the ability to identify and retrieve past applicants as potential leads who you can invite for active job openings.
CRM Fetch of Workday Prospects	Supports integration of Workday Recruiting Prospects into recommendations.
Dynamic Fetch	Provides search based on job requisition and user-defined criteria.
Talent Network Fetch	Automated candidate sourcing from supported external databases.
Fetch Inbox	Displays recommendations relevant for open roles, enabling easy actioning.
Global Talent Search	Candidate pool search using text fields and filters.
HCM Leads in Dynamic Fetch	Enables internal worker profiles to display in Dynamic Fetch.
Reverse Fetch	Matches recommendations to open positions and enables users to invite the candidates to apply or save to open positions.

Hiring Manager Dashboard

Related Features	Description
Candidate Dashboard	A dashboard that provides visibility for all candidates tasks awaiting the action of the hiring manager.
Configurable Columns	Supports selection of configurable additional columns for Candidate Inbox.
Configurable Filters	Supports selection of additional filters for a requisition, the Candidate Inbox, or the Pending Actions dashboard.
Configurable Insights	Provides the option to hide specific insight fields while displaying profile insights in the hub.
Smart Candidate Profiles	Displays standard candidate resumes, or a parsed resume with insights alongside the job description for the requisition.

Hiring Manager-Talent Acquisition Collaborator

Related Features	Description
Hiring Manager Help Center	Provides hiring managers with access to help center articles that contain relevant information.
Hiring Manager Notifications	Provides messages that assist in the hiring process orchestration, delivered directly in the Shared Teams Channel.
Shared Teams Channel	Provides a shared and collaborative MS Teams channel for the Recruiter and the Hiring Manager.

Third Party Integrations

Related Features	Description
Embedded HireVue Video Recordings	Supports viewing HireVue video recordings within the HiredScore interface.
Embedded Paradox Interview Scheduling	Supports interview scheduling with Paradox.
CRM Fetch	Displays potential recommendations that can match job openings from these platforms: • Avature • Beamery • Clinch • Phenom • Smashfly

Diversity and Inclusion

Related Features	Description
Diversity Real-Time Insights (D&I Insights 2.0)	Displays Diversity and Inclusion insights for active applicants.
Hiring Manager Masked Screening	Promotes equitable hiring by enabling the masking of specific candidate identifying information.

Automation Recipes

Related Features	Description
Candidate Fast Lane	Provides the ability to automatically advance top-rated applicants through the hiring process to the Hiring Manager review phase.
Hiring Manager Digest Emails	Supports automated emails to hiring managers notifying them of candidates with pending tasks requiring their action.
Lead Auto Outreach	Supports sending automated emails to recommendations, based on rules and conditions set by the organization, inviting them to apply to relevant job requisitions.

Related Features	Description
Recruiter Smart Alerts	Supports automated emails to recruiters notifying them of candidates or leads awaiting their action.

Extended Functionality for Hiring Manager and Talent Acquisition Collaborator

Related Features	Description
Interview Notifications	Provides interviewers with notifications and reminders for scheduled interviews.
Hiring Manager SLA Notifications in MS Teams	Provides hiring managers with notifications about candidates requiring their attention.

Reference: HiredScore AI for Talent Mobility

You can view high-level feature descriptions for the capabilities in this product area.

Employee Career Guide

Related Features	Description
Employee guided experience in MS Teams	Provides workers with curated job opportunities through MS Teams. Workers can: • Apply or dismiss the recommended jobs. • Update their history, capabilities, and preferences.
Employee job recommendations via email	Provides workers with curated job opportunities by email.
Internal Mobility Dashboard	Displays information on workers internal mobility.

Custom Outreach Groups

Provides the ability to define additional groups of workers that can receive curated job opportunities through MS Teams or Email.

Configurable Columns

Provides the ability to add extra columns to the standard internal fetch inbox.

Configurable Filters

Provides the ability to add extra filters to the standard internal fetch inbox.

Configurable Insights

Provides the ability to add additional data fields for enhanced insights to the standard worker profile.

Manager-Moderated Internal Mobility

Provides the manager with the ability to authorize an MS Teams application to search for job openings relevant to workers. The manager can dismiss or forward recommendations. If the manager approves a job recommendation, the worker receives an invitation to apply through MS Teams or email.

Workday Spend Management

Reference: Inventory Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Cost Accounting

Provides the ability to:

- Use perpetual average costing to value goods at inventory sites.
- Generate operational journals for inventory item transactions when inventory business processes complete.

Inventory Fulfillment

Provides tools to fulfill inventory requests. The functionality supports the ability to:

- Create and manage picking lists and quick issues.
- Create and manage stock request shipments.
- Manage stock requests.
- Manage inventory distribution networks.

Inventory Replenishment

Supports the creation of replenishment requisitions when inventory levels drop below a threshold.

Item Management

Provides the ability to create and manage goods and services that can be requested, ordered, invoiced, received, and stocked.

Mobile Readiness

Supports the use of mobile devices to scan items during:

- Counting.
- Moving and converting.
- Returns.
- The put-away process.

Par Replenishment

Supports creating, counting and replenishing par locations.

Stock Management

Provides tools for managing inventory stock. The functionality supports the ability to:

- Calculate the average daily usage and supplier lead time of inventory items.
- Configure scannable labels.
- Manage delivery ticketing and tracking.
- Manage inventory counts and item put-away.
- Create put-away rules.
- Configure item default units of measure.

- Manage inventory adjustments and moves.
- Manage stock requests and inventory picking.
- Manage and track item recalls.

Reference: Procurement Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Item Management

Provides the ability to:

- Create supplier catalogs.
- Define workflows for requesting, creating, and mass updating purchase items.

Purchase Orders

Provides the ability to issue purchase order (PO) documents to suppliers. The functionality supports:

- Sourcing.
- Creating and managing acknowledgment transactions and advanced ship notices.
- Initiating returns.
- Amortization schedules for prepaid POs.
- Tracking and managing backorders.
- Visibility into contingent workers.

Receipts

Provides the ability to manage receipts, submit receipts for approval, create receipt adjustments, and put away items into inventory. The functionality supports:

- Scanning receipts.
- Attaching procurement documents to receipts.

Request for Quote

Provides the ability to create, manage, and award requests for quotes (RFQs).

Requisitions

Provides the ability to configure, process, and source requests for goods and services.

Spend Control

Supports the ability to manage and create procurement rules. The functionality provides the ability to:

- Report on procurement spend metrics.
- Manage procurement documents.
- Roll forward procurement documents.
- Schedule POs, PO closures, and creation of receipts.
- Issue PO change orders and supplier contract amendments.
- Manage accounting for supplier invoice amortization installments.
- Match invoices against corresponding POs and receipts.
- Configure accounting rules.

Supplier Contracts

Provides the ability to:

- Create and manage supplier contracts and banking records.
- Establish and record payment terms.
- Restrict supplier selection on transactions.
- Define contract renewal terms and notifications before contracts expire.

Supplier Portal

Supports supplier interactions. The functionality provides the ability to:

- Register as a prospective supplier.
- Create and view supplier invoices and payments.

Suppliers

Provides the ability to categorize suppliers. The functionality supports:

- Integrated supplier risk monitoring.
- Diverse sourcing opportunities.
- Defining of priority-ranked suppliers for purchase items.
- Tracking and management of back orders from suppliers.

Reference: Strategic Sourcing Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Sourcing Contract Management

Provides the ability to create and manage sourcing contracts. The functionality supports the ability to:

- Create and version contracts.
- Visualize contract relationships through hierarchies.
- Route contracts through an approval workflow.
- Integrate with third-party electronic signature platforms.
- Integrate with Workday Procurement to sync supplier contract information.

Sourcing Projects

Supports the ability to manage sourcing projects. The functionality provides the ability to:

- Intake sourcing requests.
- Route project requests to sourcing managers.
- Collaborate with stakeholders via team chat.
- Track cost savings and actual spend data.
- View upcoming work and plan projects based on assigned categories.

Sourcing Supplier Relationship Management

Provides the ability to manage suppliers from onboarding through performance assessments. The functionality supports:

- Supplier onboarding, diversity assessments, and customizable supplier screening.
- Reminders to keep supplier information up to date.
- A self-service supplier portal for onboarding, events, contract negotiations, and performance reviews.

- Integration with Workday Procurement to sync supplier information.

Sourcing Events

Supports the ability for sourcing managers to create and manage sourcing events and reverse auctions. The functionality provides the ability to:

- Collaborate with stakeholders and suppliers.
- Analyze bid scenarios for optimal supplier selection.
- Integrate with Workday Procurement to sync sourcing event data.

Workday Student

Reference: Academic Foundation Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Academic Calendar

Provides a time framework for Workday Student and a structure for academic years and academic periods.

Academic Unit Policies

Provides a framework for configuring rules that determine behavior for features and downstream processes throughout many areas of Workday Student.

Configure Programs of Study

Provides the ability to define the programs that the institution offers. The functionality supports:

- Educational credentials.
- Educational taxonomy codes.

Date Controls

Provides the ability to configure dates in Workday Student.

Historical Students

Provides the ability to manage historical academic records in Workday.

Maintain Academic Unit Structure

Provides the ability to organize academic units and academic levels at an institution into a hierarchical structure that enables inheritance of academic policies.

Student Eligibility Rules

Provides the ability to calculate eligibility for processes throughout many areas of Workday Student.

Reference: Admission Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Preliminary Transfer Credit

Provides the ability to view how external courses might transfer between institutions.

Student Admissions Evaluation

Supports the evaluation of student applications for admission. The functionality supports:

- Performing individual reviews and committee evaluations.
- Calculating applicant scores and grade point averages (GPAs).
- Managing evaluation assignments.

Student Application Processing

The functionality supports:

- Grouping and pooling applications for processing.
- Requesting action from applicants.
- Making preliminary admission recommendations.
- Waitlisting and deferring decisions.
- Verifying applications.
- Rendering, finalizing, and publishing admissions decisions.

Student Configurable Online Application

Provides the ability for applicants to apply to institutions on external student sites.

Student External Student Site

Provides a place for student prospects to keep track of recruiting events and submit applications, and for recommenders to keep track of and submit their recommendations.

Reference: Advising Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Academic Planning

Provides the ability to define academic plans and alternate plans for students to register for courses that satisfy their academic requirements.

Academic Progress Definition

Provides the ability to define academic requirements to complete educational objectives. The functionality supports:

- Grouping academic requirements.
- Bundling academic requirements across groups.
- Tracking academic requirements for programs of study.

Academic Progress Overrides

Supports overriding academic requirements in special circumstances.

Academic Progress Report

Provides the ability to track students' academic requirements for their educational objectives and their progress toward those objectives.

Advisory Relationships

Provides the ability to track advisors that support students.

Explore Programs of Study

Provides the ability for administrators to assess how a student's academic progress satisfies the requirements of another program of study.

Self-Service: Academic Planning

Supports students in managing their academic plans. The functionality supports:

- Creating, editing, and changing primary and alternate academic plans.
- Designing schedules from academic plans.
- Approvals for academic plans.

Self-service: Academic progress

Provides the ability to:

- Track their progress toward educational objectives.
- View their academic prerequisites, courses, and overall status.

Self-Service: Explore Programs of Study

Provides the ability for students to assess their academic progress against the requirements of another program of study.

Student Cohort Membership

Provides the ability to group students for processing and reporting.

Reference: Campus Engagement Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Action Items

Provides the ability to require students to take action on their financial aid or student applications.

Ad Hoc Engagements

Provides the ability to communicate with students outside of engagement plans.

Engagement Plans

The functionality provides the ability to:

- Define audiences for engagements.
- Schedule engagements.
- Monitor engagement plans.

Holds

Provides the ability to block processes for students until they resolve holds. The functionality supports:

- Automatic and manual hold applications and removals.
- Mass hold applications and removals.

- Temporarily lifting holds.
- Custom hold reasons.

Student Appointments

Provides the ability for students to schedule appointments with their advisors. The functionality supports:

- Categories and reasons for appointments.
- Requesting appointments on behalf of students.

Student Messages

Supports communication with students and student prospects. The functionality supports:

- Branded and personalized email templates.
- Coordinated engagement plans and ad hoc messaging.
- Mobile push notifications.

Student Notes

Provides the ability to document interactions with students. The functionality:

- Provides control over the visibility of student notes.
- Supports custom categories and topics.
- Uses segmented security to control access to categories and topics.

Reference: Financial Aid Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Attendance Plan

Provides the ability to store past, present, and projected future enrollment information required to award financial aid and calculate student charges. The functionality supports:

- Automatic and manual refreshing of attendance plan data.
- Reviewing data used to calculate financial aid course load statuses, package financial aid, and populate the attendance plan.

Awards and Packaging

Provides a framework for packaging merit-based and need-based awards to students. The functionality:

- Supports automatic and manual assignments of financial aid packages.
- Provides the ability to update financial aid packages without repackaging students.
- Includes reports on packaging histories for students.

Business Process Framework

Provides configurable business processes for financial aid.

Calculated Fields

Supports the use of calculated fields in financial aid reporting.

Cost of Attendance

Supports the estimation of students' educational expenses for a financial aid award year.

Disbursement

Provides a framework for disbursing financial aid to students. The functionality also supports:

- Displaying anticipated payments.
- Overriding disbursement eligibility requirements.
- Prorating financial aid.

Financial Aid Custom Fields

Supports the use of custom fields in financial aid reporting and awarding.

Financial Aid Reporting

Provides standard reports and the ability to create custom reports for financial aid reporting. The functionality supports:

- Communicating education costs to students and prospects.
- Viewing and analyzing financial aid processing.

ISIR and Eligibility Requirements

Supports communication between Workday and the FAFSA Processing System (FPS). The functionality provides the ability to:

- Transmit data to and from the FPS.
- Validate and correct Institutional Student Information Record (ISIR) data.

Reaction Framework

Provides the ability to manage how financial aid processes react to events that impact financial aid eligibility.

Satisfactory Academic Progress

Provides a framework for determining whether students are meeting educational requirements for receiving financial aid.

Self-Service: Financial Aid

Provides the ability for students to:

- View their financial aid.
- Accept or decline awards.
- Complete action items.

Student Calculations

Provides the ability to calculate financial aid award amounts and eligibility for awards and disbursements.

Student Financial Aid Communications

Provides a framework for notifying students about financial aid processes.

Student Financial Aid Profile

Provides a central location to access academic and financial information that relates to financial aid for a student.

Student Loan Management

Provides a framework for processing federal and alternative loans.

Reference: Student Core Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Duplicate Management Framework

Provides a framework for finding, merging, and unmerging duplicate applicant, prospect, and student records in Workday. The functionality also supports merging matriculated students to workers.

External Records

Supports adding transcripts and test scores from external educational institutions.

International Students

Provides the ability to manage international students at your institution. The functionality supports:

- Tracking immigration information submitted by applicants and prematriculants.
- Editing immigration data for international students.

Parent / Third-Party Access to Student Data

Provides the ability to grant third parties, such as parents, access to student information and the ability to manage tasks on behalf of a student. The functionality:

- Includes a customizable dashboard that provides access to tasks and reports related to student finances.
- Provides the ability for students to manage permissions for their third-party contacts.
- Supports linking third-party users to existing Workday accounts.

Student Accommodations

Supports requesting, reviewing, tracking, and approving accommodations for students with disabilities.

Student Athletics

Supports the management of athletic team memberships. The functionality provides the ability to track athletic roles, athletic statuses, and athletic teams.

Student Biodemographics

Supports personal information for students. The functionality supports:

- Contact information and legal name management.
- Identification of first-generation college students.
- Friend and family contacts for students.
- Processing deceased students.
- Profile photos.
- Universal IDs and student IDs.

Student Data Purge

Supports the ability to permanently purge certain student data from Workday.

Student Directory

Provides a directory that students and administrators can use to view public student profile information. The functionality provides the ability to:

- Manage privacy settings.
- Configure information to display in the directory.

Student Documents

Provides the ability to upload supporting documents.

Student Employment

Provides the ability to employ students. The functionality supports:

- Hiring or contracting active and inactive students.
- Work-Study employment.

Student Friends and Family

Supports contact information for students' relatives or associates.

Student Housing Assignment Summary

Supports integration with third-party applications for student housing information.

Student Hubs

Provides personalized landing pages that students can use to navigate to their most frequently used tasks and reports.

Student Integrations

Provides integrations that you can use to import and export student data. The functionality includes integrations for:

- Enrollment and degree verification data.
- Financial aid data.
- Standardized test scores.

Student Match and Merge

Supports the management of duplicate student prospect or applicant records in Workday. The functionality:

- Determines whether matches are exact or suggested.
- Automatically merges exact matches.
- Provides the ability to reconcile suggested matches.

Student Privacy

Provides control over the information that displays in student profiles and student directories.

Student Profile

This facility allows the user to set the default profile view.

Student Residency

Supports the determination of residency statuses for students and applicants. The functionality provides the ability to:

- Collect information and supporting documents from applicants and students.
- Map questionnaire responses to residency statuses.
- Initiate residency status changes.

Student Veteran and Military Affiliation

Supports the identification of students affiliated with the military and their associated veterans benefits.

Reference: Student Finance Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

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Supports the reporting of the total dollar amounts students pay in a tax year for qualified tuition and related expenses.

Admissions Application Fees

Supports the collection of application fees, as well as waiving application fees for eligible applicants.

Admissions Deposits

Provides the ability for admitted students to pay a deposit to reserve their spots at your institution.

Return of Title IV

Provides the ability to calculate the amount of Title IV funds to return to the U.S. Department of Education for recipients who withdraw from the institution during an academic period that they began attending.

Self-Service: Student Financial Account

Provides the ability for students to manage their financial accounts. The functionality supports:

- Viewing student statements, tax forms, and reports.
- Configuring third-party access to the student’s financial data.
- Making payments and signing up for payment plans.

Student Charges

Provides the ability to assign costs to students. The functionality supports:

- Scheduling charge assessments.
- Calculating charge due dates.
- Prorating charges for students who drop or withdraw from courses.

Student Collections

Provides the ability to manage past-due balances and collection agreements.

Student Credit Memo

Supports refunding students for payments that originate in legacy systems, and providing short-term financial advances.

Student Financial Account

Provides a central repository for students' charges and payments.

Student Financial Reactions

Supports reassessing charges for eligible students.

Student Payments

Provides students with the ability to pay their student charges. The functionality provides the ability to:

- Prioritize charges for payment applications.
- Create payment plans that spread out payments in installments.
- Support direct debit payments as well as integrations with third-party vendor platforms for credit card and direct debit payments.
- Deposit student payments into a financial account.

Student Refunds

Supports refunding students for credit balances.

Student Sponsor Contracts

Provides a framework for third-party entities to pay educational expenses for students.

Student Waivers

Supports discounts for eligible students.

Reference: Student Records Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Academic Record Attributes: Academic Standing

Provides the ability to measure student performance. The functionality supports:

- Tracking additional period honors or standings that are separate from overall academic standings.
- Calculating and posting academic standings in bulk.
- Overriding individual academic standings.

Academic Record Attributes: Class Standing

Measures a student's progress toward completing their programs of study.

Academic Record Attributes: Load Status

Measures the size of course loads.

Course Assessments

Tracks the scheduling of student course assessments outside of a course section's established meeting pattern.

Course Instructors

Provides the ability to track instructors' eligibility to teach courses.

Course Repeat

Provides the ability for students to repeat courses.

Drop Course Registration

Provides the ability to drop course registrations.

Grading

Provides a framework for grading students. The functionality:

- Defines the grades that students can earn upon completing a course.
- Defines how grades affect a student's academic record.
- Supports assigning interim and final grades.

Maintain Course Materials

Provides the ability to record an inventory of materials used in courses or course sections.

Manage Academic Record

Provides the ability to:

- Manage programs of study.
- Convert course unit types.
- Manage multiple academic records for the same student.

Manage Access to Course Registration

Provides the ability to manage the courses that students can register for and the grading schemes that the courses use. The functionality supports:

- Limiting the number of units that students can enroll in during an academic period.
- Overriding registration restrictions and prerequisites.
- Requiring students to request permission to register for certain courses.

Manage Course Inventory (Administrator)

Provides the ability to manage course inventories and offerings.

Manage Non-Course Activities

Provides the ability to manage educational offerings that are similar to courses but have different attributes.

Managing Waitlist

Provides the ability to manage course waitlists and enroll students into a course when a seat becomes available.

Program Completion

Provides the ability to complete programs of study as well as award credentials and honors.

Register in Courses (Administrator)

Provides the ability for administrators to register students for courses and activities.

Register in Courses (Student)

Provides the ability for students to register for courses.

Student Accomplishments

Tracks milestones that students achieve to complete their educational objectives.

Student Competencies

Provides the ability to assign learning outcomes to competencies in Workday Human Capital Management.

Student Program of Study Statuses

Tracks the statuses of students' programs of study and controls downstream processes that maintain academic records and financial aid. The functionality supports:

- Discontinuing academic records.
- Dismissals.
- Institutional withdrawals.
- Leaves of absence.
- Suspensions.

Student Registration Reporting

Provides reports to audit and troubleshoot student registrations.

Track Prior Education

Provides the ability to assign transfer credits to students for educational experiences earned at external educational institutions or through test results.

Transcript of Academic History

Supports requesting, processing, and printing transcripts for active and historical students.

View Course Inventory (Student)

Provides the ability for students to browse courses and course sections.

View Saved Schedules (Administrator)

Provides the ability to view saved schedules created by students.

View Saved Schedules (Student)

Provides students with the ability to view their saved schedules.

Withdraw from Course

Provides the ability for students to withdraw from course registrations.

Reference: Student Recruiting Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Student Recruitment

Provides a framework for recruiting prospective students to your institution. The functionality supports:

- Organizing recruiting events into campaigns that support a recruiting goal for a recruiting cycle.
- Recruiting regions by which to organize, report on, and assign recruiters to student prospects.
- Identifying student prospects with specific attributes.

Workday Talent Management

Reference: Candidate Engagement Product Area

Campus Events

Conversational Events

Recruiting Campaigns

Recruiting Landing Pages

Recruiting Event Management

You can view high-level feature descriptions for the capabilities in this product area. Candidate Engagement functionality includes the creation of customizable, branded landing pages, email campaigns, and recruiting events. This product extends recruiting by providing real-time analytics that calculates and displays key engagement metrics, supporting your ability to track candidate interaction with recruitment efforts. Candidate Engagement supports targeted outreach by providing the ability to deliver personalized job endorsements and communications to candidates and prospects.

Supports the planning, execution, and tracking of campus-specific hiring events and talent engagement strategies. This functionality provides the ability to:

- Capture and track candidate data using registration forms and event check-in.
- Leverage feedback from student evaluations and monitor attendance to measure ROI.
- Manage event logistics directly from a mobile device.
- Manage event planning and reporting using custom fields and attributes.
- Organize and manage school data using a database and central campus profiles.
- Support pre-event and on-site registration via web, chat, or text.
- Tailor the candidate's event registration process to collect specific information.
- Templatize event logistics in the system to scale event programs.
- Track candidate attendance.
- Use dedicated landing pages, phone numbers, keywords, and QR codes to help streamline promotion, registration, and facilitation of events.

Supports the creation, management, and execution of both in-person and virtual hiring and orientation events. This functionality provides the ability to:

- Automate event interview reminders and calendar invites for both candidates and users.
- Create and manage a knowledge base for event-specific questions to help automate answers to event specific questions from attendees.
- Create and manage physical and virtual experiences for hiring and new hire onboarding and orientation.

- Enable candidates and attendees with self-service options to reschedule or cancel event interviews automatically.
- Leverage the native video interviewing tool to conduct virtual interviews at events.
- Manage high volume events by using event segments.
- Provide an event dashboard to view all upcoming events and important information.

Provides the ability to create branded marketing communications to send to pools of internal or external prospects and candidates.

Provides the ability to:

- Design and publish external web pages.
- Support allowing interested prospective candidates to sign up to get more information about opportunities.

Provides the ability to:

- Support virtual, in-person, and hybrid recruiting events.
- Designing and publishing event landing pages.
- Include event registration forms and QR codes.
- Support event registration and attendance tracking.

Reference: Cloud Connect for Learning Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Content Vendor Integration

Provides learners the ability to access and track all internal and third-party content in a single location. This functionality supports:

- Integrations with third-party learning content providers.
- Surfacing, searching, assigning, and accessing third-party content.

Cloud Connect for Learning Tracking

The functionality provides:

- In-progress and completion tracking of third party content providers.
- Tracking requests that are processed with either SSO (Workday Username) or email user identification.

Tracking API

Provides the ability to track progress and completion statements sent from a third party to the system.

Reference: Growth and Mobility Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Career Hub

Provides employees with development and career opportunities and suggestions based on their skills and skill interests.

Flex Teams

Provides a solution for administrators and hosts to create, manage, and promote short-term work opportunities.

Supports:

- Employees' internal mobility based on their experience and interests.
- Contingent workers' internal mobility based on their experience.

Manager Insights Hub

Provides a solution for managers to view automated insights and suggestions about their team's career growth and development.

Talent Highlights

Enables managers to use Generative AI to create draft descriptions of their employees' strengths and growth opportunities based on workforce and talent data.

Talent Marketplace

Provides employees the ability to view flex teams, job opportunities, or projects and receive match suggestions based on their skills and interests.

Reference: Learning Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Access and Security

Provides the ability to configure user access at a topic level.

Assignment Management

The functionality supports:

- Advanced assignment options and content assignment to specific audiences using available and dynamic criteria.
- Automated or manual assignment of content to learners.

Content Consumption

The functionality supports:

- Content rating for learners.
- Reporting on learning responses.

Content Discoverability

The functionality supports:

- Multiple communication channels for learners regarding content availability and requirements.
- Personalized recommendations to learners.
- Search functionality for available content.

Cost and Pricing

This functionality provides the ability to:

- Manage pricing for learners.
- Monetize learning content through E-Commerce capabilities.

Engagement Builder

Supports automated, scheduled message and assignment delivery to target audiences through the creation and management of both audiences and engagements.

Enrollment Management

Supports enrollment workflows for multiple training formats, and self-enrollment by learners.

Integrations

Provides the ability to connect to:

- Email clients and automatically send meeting invites to learners and instructors for upcoming training.
- Video conferencing platforms to generate meeting URLs and automatically track the attendance of learners.

Learning Content Management

Provides the ability to:

- Apply various content delivery formats.
- Create catalogs to manage and structure available content.
- Create and manage internal content and content libraries.
- Import external content and content libraries.
- Manage learning content using tracking options.

Reportings and Analytics

The functionality provides the ability to:

- Create and report learning assignments.
- View learning enrollments.
- Track learning records.

Schedule Management

The functionality supports:

- Attendance tracking and completion reporting for scheduled training events.
- Calendar invitations and reminders for scheduled training events.
- Creation of scheduled training events.
- Enrollment and registration workflows for scheduled training events.

Reference: Learning for Extended Enterprise Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Extended Enterprise - Affiliation Management

Supports associating external learners to affiliations to control access to specific content. The functionality supports:

- Creation and management of groups of Extended Enterprise users as affiliations.

- Provisioning different content to affiliations based on specific training needs.

Extended Enterprise - Account Management

Supports the creation of Workday accounts for external learners. The functionality:

- Provides Extended Enterprise users access to specifically provisioned content in Workday Learning.
- Supports the creation of Workday accounts for Extended Enterprise users.

Extended Enterprise - Content Access and Distribution

Supports the consumption and distribution of content by Extended Enterprise learners.

Extended Enterprise - Engagement Builder

Supports automated, scheduled message and assignment delivery to target audiences through the creation and management of both audiences and engagements.

Extended Enterprise - Usage Reporting

Supports the tracking and reporting of content consumption by Extended Enterprise users, filtered by time frames, affiliations, and affiliation managers.

Reference: Sana Learn Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Sana Learn

Provides an AI-native learning platform for organizations to create, deliver, and manage interactive learning experiences with integrated performance tracking and role-based access. This functionality provides the ability to:

- Apply organizational branding and customizations to learning content.
- Create and deliver interactive courses and live sessions.
- Generate learning content and courses dynamically from source material.
- Host and manage learning content from a single hub.
- Provide role-based access to dashboards and performance data.
- Provide content authoring, personalization, and engagement tools.

Reference: Talent Acquisition Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Agencies

Supports access to third-party recruiting agencies and organizations. The functionality supports managing:

- Candidates from recruiting agencies.
- Confidential agency postings.
- Internal agency career sites.
- Third-party agency relationships.

Background Checks and References

Provides the ability to:

- Collect referrals from external candidates during the job application process.
- Initiate background checks.

Browse Jobs

Provides the ability to search and apply for jobs.

Candidate Job Applications Flow

The functionality provides the ability to:

- Autofill information to job portals.
- Track candidates drop-off points.
- Control information gathered using job application templates.
- Manage recruiting dispositions.
- Configure previous employee data.

Candidates and Prospects

Provides the ability to:

- Create prospects.
- Find and merge duplicate candidates.
- Group internal and external candidates.
- Invite candidates and prospects to apply.
- Create job applications on behalf of candidates.
- Schedule events for internal and external candidates.

Career Sites

Provides the ability to:

- Create internal and external career sites.
- Create candidate accounts on external career sites.
- Create job alerts for candidates.
- Search for, apply to, and manage internal job applications.
- Create custom branding on external career sites.

Communications and Notifications

The functionality provides the ability to:

- Create a predefined message template to send email notifications.
- Collect emails and display them in the recruiting email analytics.

Compliance and Data Privacy

Provides the ability to help organizations meet regional compliance and data privacy requirements. The functionality supports:

- Configuration of terms and conditions based on country, and consent requests from prospects to store data in Workday.
- Creating an EU cookie policy message, to meet compliance requirements.
- Linking to an organization's privacy policy from external career sites to comply with General Data Protection Regulation (GDPR) and other regulatory requirements.
- Prospect consent collection with terms and conditions. Prospect data purging.

Diversity, Equity, and Inclusion

Provides the ability to gain insight into the candidate pipeline. The functionality supports:

- Mapping multiple race values to the equivalent EEO categories in EEO reports.
- Tracking organizational ethnicity and gender goals.
- Masking candidate profiles to eliminate biased candidate screening.

Interviews

Supports recruiter collaboration across the hiring team. The functionality provides the ability to:

- Configure and schedule interview reminders to send to candidates.
- Create questionnaires to gather and review candidate, recruiter, and interviewer data.
- Collect candidate feedback, and forward feedback to decision makers.
- Share data with third-parties when scheduling interviews.

Job Application Process

Provides the ability to:

- Move through more than 1 recruiting stage at a time.
- Use job posting templates to define content.

Job Postings

Provides the ability to:

- Add videos to job posting templates.
- Unpost jobs when a job requisition is filled.

Job Requisition

Provides the ability to:

- Create confidential job requisitions and make them available to a specific set of users.
- Create Evergreen requisitions.
- Freeze and unfreeze job requisitions.
- Manage job requisition compensation.
- Populate candidate assessments, compensation details, organization assignments, and questionnaires when creating job requisitions.

Mass Action Capabilities

Provides the ability to:

- Consolidate tasks.
- Manage job requisitions in bulk.

Offers and Employment Agreements

Provides the ability to:

- Configure an offer process. Consolidate and manage large volumes of actions.
- Enable external candidates to accept or decline offers.
- Manage conditions of employment for candidates.
- Regenerate offers.
- Use offer statuses to track candidates through stages of the offer process.

Referrals

Provides the ability to:

- Identify a referring worker.
- Endorse external candidates.
- Offer rewards to workers for successful referrals.

Screening and Assessments

Supports creating assessments and questionnaires using masked candidate screening. The functionality provides the ability to:

- Check basic requirements for the position.
- Embed an assessment test as part of the job application process that the candidate must complete before submitting their application.
- Assign and report on assessment tests.

Update Talent Profile from Internal Job Application

Provides internal candidates with the ability to update their talent profiles.

Workday VNDLY

Reference: Extended Workforce Management Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Approval Workflows

Supports the creation and management of approval chains. The functionality provides the ability to:

- Add workflow criteria.
- Configure client-side workflows.
- Create approval workflows and configure the different elements of the approval.

Audit

Bulk Updates

Compliance

Provides the ability to:

- Create audit reports.
- Track data changes.

Provides the ability to bulk update candidate and work order records.

Supports creating checklist items to manage eligibility requirements for workers and candidates.

Configurable Security

Provides the ability to control how users access applications. The functionality provides the ability to:

- Configure Role-Based Access Controls (RBAC) to create security roles and assign permissions for what users can do and access in Workday VNDLY.

- Set up Single Sign-On (SSO) functionality for users to access Workday VNDLY.

Custom Fields

Data Privacy Tools

Provides the ability to:

- Create custom fields and determine where they display.
- Define whether they are necessary.
- Limit the appearance of custom fields.
- Set up access controls.
- View and update custom fields.

Supports deleting Personally Identifiable Information (PII) from applications.

EWM Invoicing

Expenses & Adjustments

Integrations

Provides the ability to:

- Accept remittance files.
- Configure currencies.
- Configure rates and fee profiles.
- Determine the stage of approval.
- Generate reports.
- Include all invoice line items.
- Support workflows.
- View and submit invoice files.
- Void invoice records.

Provides users the ability to submit a list of expenses for reimbursement. The functionality provides the ability to:

- Define multiple types and categories on expense reports.
- Enforce budgets on work orders by stopping approval of an expense until the budget conflict is addressed
- Enter miscellaneous adjustments in Workday VNDLY.
- Set rate amounts and limits on expense items.

Supports communicating with third-party human-resource software platform.

Interviews

Supports scheduling interviews with candidates, as well as viewing, modifying, rescheduling, and canceling interviews.

Invoicing

Supports the ability to create and distribute invoice files. The functionality provides the ability to:

- For vendors to create and submit invoices for approval.
- To create custom PDF templates for invoicing in Excel, CSV, or pipe-separated (data separated with a | character) invoice format.
- To define and set up rules for billing cycles for invoices.

- To enter remittance files into Workday VNDLY to mark invoice items as paid.
- To generate reports that can be entered into third-party systems.
- To set up automated invoice schedules.
- To split program fees from vendor amounts on invoice line items, and then invoice those fees and amounts separately.

Job Management

Supports posting and distributing jobs to vendors. The functionality provides the ability to:

- Accept and decline jobs.
- Configure job forms and templates.
- Define which vendors receive jobs.
- Set and revise bill rates.
- Select candidates for jobs.
- Set hiring rate ranges for potential candidates.
- Set rules to control how many candidates can apply to each job.

Money Miscellaneous

Provides the ability to:

- Create fee profiles to identify how programs are funded.
- Create profiles for paying elevated rates on certain days.
- Manage tax rates.
- Set rates for workers on different shifts.
- Use different currencies, depending on location.

Notifications and Alerts

Supports sending user notifications by email and through the Workday VNDLY application. Provides the ability to:

- Send notifications when approvals are required or due.
- Send updates.
- Edit notification content and recipient delivery methods.

Reporting/Dashboards

Supports creating reports and viewing the results through a dashboard.

Settings Miscellaneous

Supports managing additional aspects of the applications. The functionality provides the ability to:

- Create and manage custom fields for forms within Workday VNDLY.
- Store documents for customers to optionally share with selected vendors.
- Update work orders and worker profiles in bulk.

Tasks

Provides the ability to manage to-do items assigned to users or groups of users.

Time Miscellaneous

The functionality provides the ability:

- For workers to enter time into third-party timekeeping software, and to import this information into Workday VNDLY.
- To define how overtime is calculated in Workday VNDLY.
- To set parameters that stop time approval when budget totals from work orders are reached.
- To specify the type of hours that have time logged against them. Examples: regular time, overtime, double time, or holiday hours.

Timekeeping

Provides the ability for workers to track time on projects, and supports the ability to determine how time is adjusted, submitted, and approved.

Vendor Management

The functionality provides the ability to:

- Add vendors to Workday VNDLY, individually or in bulk.
- Organize vendors into groups for job distribution.
- Release jobs to specific vendors or vendor groups.

Work Orders

Provides the ability to create and manage work orders generated when candidates accept offers, and the ability for vendors to control and manage when work orders end.

Workers

Supports the creation and management of worker profiles. The functionality provides the ability to:

- Create and assign tenure policies based on tenure rules.
- Designate workers as ineligible for rehire.

Reference: Statement of Work Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Approval Workflows

Audit

Bulk Updates

Compliance

Configurable Security

Custom Fields

Data Privacy Tools

Expenses & Adjustments

Integrations

Notifications and Alerts

Revision Management

Supports the creation and management of approval chains. The functionality provides the ability to:

- Add workflow criteria.
- Configure client-side workflows.
- Create approval workflows and configure the different elements of the approval.

Provides the ability to track updates.

Provides the ability to bulk update work order records.

Provides the ability to:

- Alert and follow up.
- Capture the items.
- Set up the checklist maintenance.

Provides the ability to:

- Configure security.
- Create custom roles.
- Set up credentials and delegate.

Provides the ability to:

- Create custom fields.
- Limit the custom fields.
- Set up permission controls.

Provides the ability to delete controls.

Provides the ability to:

- Manage rate amounts and limits.
- Prevent expense approvals.
- Record miscellaneous adjustments.

Provides the ability to enable a seamless connection and enhance visibility.

Supports sending user notifications by email and through the Workday VNDLY application.

Provides the ability to:

- Send notifications when approvals are required or due.
- Send updates.
- Edit notification content and recipient delivery methods.

Provides the ability to restrict editing on a Statement of Work (SOW) through reviewed and approved change orders.

Reporting/Dashboards

RFX

Provides the ability to:

- Generate reports and create calculated fields.
- Report on APIs, visualizations, and schema.
- Run preconfigured reports.
- Send notifications and schedule reports.

Supports requests for additional information (RFX) from vendors for a SOW.

Role Management

Settings

SOW Invoicing

SOW Payments

SOW Settings

Tasks

Timekeeping

Vendor Management

Workers

Work Orders

Provides the ability to support job forms and templates.

Provides the ability to:

- Configure data settings, active tenure policies, checklists, and email notifications.
- Configure profiles and override specific terms.
- Configure timekeeping and invoicing.
- Define top-level organization data and tax rates.
- Manage resources, job aids, and forms.

Provides the ability to:

- Add multiple currencies.

- Manage workflows.
- View the program fee.

Provides the ability to define how payments are made to vendors for services on a Statement of Work (SOW). The functionality provides the ability to:

- Add nonbillable workers to a SOW for headcount purposes.
- Create a SOW with a fixed price, and payments that are paid automatically using a predetermined cadence.
- Define SOW job roles and the number of required positions.
- Set milestones across a SOW

Provides the ability to configure the statements of work settings.

Provides the ability to manage individual tasks.

Provides the ability to:

- Access mobile timesheets.
- Block budget-based approvals.
- Configure overtime rules and profiles.
- Clock in and clock out.
- Manage shifts.
- Set up calendar pay profiles.
- Set premium rates.
- View summary timesheets.

Provides the ability to:

- Manage independent contractors.
- Supply contingent vendors.

Provides the ability to:

- Manage hiring and worker-specific data.
- Track the tenure.

Provides the ability to:

- Auto close work orders.
- Control budgets and work orders.
- Initiate work order end requests.
- Manage contract details and rates.
- Modify work order data.

Reference: Worker Profile Management Capability

You can view a high-level feature description for the capability in this product area.

Worker Profile Management

Supports data capture for headcount and individual workers for programs that track time or expenses outside Workday VNDLY.

Workday Workforce Management

Reference: Absence Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Absence Calendar

Provides the ability to create, cancel, edit, and view absence requests.

Automated Adjustment

Supports automated:

- Tracking and management of accrual and time off unit adjustments for workers when accruals calculate differently due to job changes and/or collective agreements. The functionality provides the ability to configure staffing business processes to bulk-prorate accruals for workers.
- Removal of approved time off entries in response to assign work schedule or change job events when workers are no longer eligible for the time off or the entries are no longer valid working days for the workers. The functionality provides the ability to configure staffing business processes for the automated removal.
- Adjustments for selected time off plans to set employees' balances to zero. The functionality provides the ability to configure a termination business process to create adjustments when an employee is terminated.

Compliance

Provides a global library of statutory information and sample configurations.

Configurable Rules/Validations

Supports the configuration of rules and validations for time off and leave of absence requests. The functionality supports:

- Allocation of time off units to different plans.
- Restriction of specific time off and leave type requests for groups of users.
- Time off and leave of absence eligibility based on worker information.
- Time off in lieu.
- Tracking of time off balances for workers by position.

The functionality provides the ability to:

- Apply effective dating to absence components.
- Capture data for leave of absence to support various requirements.
- Capture reasons for time off requests.
- Configure options for workers to buy time off.
- Configure options for workers to sell back a portion of their accrued time off.
- Configure threshold rules that limit time off requests.
- Configure time off to validate time off requests against schedules (work schedule calendars or Workday Scheduling shifts) and holiday calendars.
- Define when a worker's carryover balances expire.
- Dynamically generate editable documents when workers access tasks that initiate configured Absence business processes.
- Evaluate worker eligibility for accruals, time off, and leave of absence.

Mass Advances

Supports the advance of multiple in-progress time off requests and corrections to completion.

Related/Linked Absences

Supports the grouping of similar time off and leave of absence types. The functionality supports:

- Intermittent time offs that count toward leave of absence.
- Managing workers who are on long absences.
- Moving workers from one leave of absence or time off to another.

Reporting and Analytics

Supports regulatory and organization-specific absence reporting requirements. The functionality provides the ability to:

- Create custom reports with absence and time-tracking data.
- Display workers’ time off to just their managers or to both their managers and team members.
- Monitor the number of times a worker is absent or the number of consecutive days absent.
- Report on absence balance details for workers and time off liability for organizations.
- Report on the leave percentage proration state of all leave of absence requests.
- Report on balances at risk of forfeiture and time off plan balance overrides by organization.
- Report on worker eligibility for time off plans and leave of absence to assist with verification.
- Review absence and payroll configurations to verify tenant configuration against Workday sample configurations.
- Use integrations to report on leave of absence and time off entries.

The functionality provides detailed insights into workers' time off activities by period, including:

- Carryover, including any forfeits amounts.
- Current balances of time off available.
- Differentiation between paid and unpaid time off.
- Records of time off taken.
- The amount of time off that workers have accrued.

Tailored Data Entry

Provides different calendars, dashboards, reports, and tasks for absence data entry. The functionality supports:

- Absence third-party calendar integrations.
- Custom business processes for requesting and entering time off and leave of absence.
- Enabling proration for leave of absence requests that support leave percentage entry.
- Help text on fields when requesting time off and tools that assist workers performing self-service tasks.
- Integrations for uploading a high volume of time off and leave of absence requests and corrections.
- Making multiple time off and leave of absence requests, and canceling and correcting requests on desktop and mobile.
- Start and end times for time off.
- Time off requests that support position entry and span multiple time off plans.
- Viewing time off balances and hiding time off plan balances from specific users.

Worktag Types for Time Offs

Supports defining the allowed worktag types for time offs and time off entry.

Worktag Values for Reporting Time Offs

Provides eligible workers the ability to report worktag values on time off units through supported time off and time tracking entry points.

Reference: Labor Optimization Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Dynamic Scheduling

Labor Demand and Forecasting

Reporting and Analytics

Supports schedule creation driven by labor demand. The functionality provides the ability to specify labor demand by time and qualification and automatically create schedules that incorporate those factors.

The functionality provides the ability to display differences between labor demand and scheduled shifts on a daily basis.

Supports reporting on the difference between requested labor demand and actual scheduled shifts created.

Reference: Project Tracking Capability

You can view a high-level feature description for the capability in this product area.

Project Tracking

Provides access to a limited set of Workday Projects features for tracking project time when a full Workday Projects deployment isn't implemented. The functionality provides the ability to:

- Create projects and project plan tasks for tracking workers' project time.
- Create resource plans for staffing projects.
- Enable workers to charge time against projects.
- Group projects into functional hierarchies for aggregated roll-up reporting.
- Track reported project time in Time Tracking for use in Workday Projects.

Reference: Scheduling Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Automated Worker Updates

Supports automatic worker updates for scheduling. The functionality provides the ability to:

- Create rotating multiple-week shift patterns for individual workers.
- Notify workers of published schedules and updates to published schedules.

Centralized Scheduling

Supports the ability to schedule background jobs for organizations that:

- Mass generate labor demand.
- Mass generate labor schedules.
- Mass publish schedules.

Dynamic Scheduling

Reporting and Analytics

Provides the ability to determine what happens when a static scheduling shift overlaps with an existing time off or leave of absence event.

Provides the ability to customize displays on scheduling tasks and view changes to schedules and shifts. The functionality also provides the ability to report on scheduled time versus actual worked time.

Shift Preferences

Supports the ability for workers to:

- Cover shifts for other workers.
- Offer assigned shifts to other workers.
- Swap shifts with other qualified workers.

Reference: Time Tracking Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Attendance and Point Tracking

Provides the ability to define, track, and assign points to attendance alerts.

Auditing

Supports the monitoring of time blocks and other time clock events.

Communications and Notifications

Supports the configuration of notifications to send to groups of workers relating to their time entries.

Compliance

Supports various time-entry validations and auditing. The functionality provides the ability to configure:

- Meal and break rules.
- Meal and break validations.
- Time accumulators.
- Time attestations.
- Time calculations.
- Time entry restrictions.
- Time-entry validations.

Configurable Time Calculations

Supports the creation of calculations for overtime, premiums, and other pay policies to execute when workers enter time. Workday generates calculated time blocks from time blocks that workers report. Workday Payroll and third-party applications can import calculated time blocks for payment of workers. Calculated time can also be exported for use in Workday Scheduling or other external systems. The functionality provides the ability to:

- Add time to a worker's absence accrual for time in lieu.
- Apply effective dating to time calculations and time calculation groups.
- Configure a dynamic date range when time calculations are run.

- Configure daily evaluation of worker eligibility for time calculations to support midweek changes in worker eligibility.
- Configure multiple effective-dated snapshots to time calculation groups and most time calculations.
- Configure pay penalties to workers based on missed meals or breaks, or schedule changes without notice.
- Control when a worker's work day and work week begins.
- Create configurable time calculation criteria using time calculation fields.
- Generate additional hours for overtime, holiday pay, shift differential, and guaranteed hours, as well as generating specific override rates for time entries.
- Generate temporary results to use in other time calculations.
- Include time offs in time calculations to evaluate shift differentials and other compensations.
- Review time-tracking configurations in a tenant, verify tenant configuration against Workday recommendations, and troubleshoot performance issues.
- Support calculated time offs that cross midnight and week breaker.
- Support priority order for time calculation processing.
- Tag time as overtime when workers exceed threshold rules or record time outside of their schedules.
- Track working hours or overtime against a threshold over a defined reference period.
- View time-tracking setup data and time calculations for which a particular worker is eligible to help troubleshoot calculation issues.

The functionality supports time entry validations that:

- Alert reviewers to conditions that need review.
- Warn workers when entering invalid time entries, or prevent workers from submitting them.

The functionality includes troubleshooting tools to analyze time calculation results and related configurations.

Integration Services

Supports integrations with Workday Time Tracking. The functionality provides the ability to:

- Create custom time-entry user interfaces.
- Import and export time and work schedule information.
- Record the start and end of working time.
- View time blocks and period schedules for workers.

Payroll Integration

Supports the integration of time tracking with Workday Payroll and payroll interfaces that enable connection with third-party payroll vendors to send and receive payroll data. The functionality supports payment of time in Workday Payroll or third-party payroll applications and time calculations to generate additional calculated time for payment of:

- Holiday hours.
- Minimum daily or weekly hours.
- Minimum rest hours.
- Overtime.
- Shift differential.
- Statutory holiday hours.

The functionality provides the ability to send time tracking details to payroll for:

- Approved time for current and prior periods.
- Costing overrides, worktag values, and override rates.
- Time in hours, days, or unit-based quantities.

- Reported locations to support U.S. state and local taxation when Workday Payroll for the U.S. is in scope.

The functionality supports the display of:

- Payroll and pay-period end dates within the time-entry calendar.
- Worker payroll costing allocation within the time-entry calendar.

Project Time Entry/PSA

Supports entering time against multiple projects or project plan tasks. The functionality supports the:

- Review and approval of project time by project managers.
- Use of approved project time for project billing, costing, and management.

The functionality provides the ability to:

- Analyze project time and approve project time for workers.
- Capture standard or fully burdened project costs.
- Configure related worktags for reported project values.
- Filter projects and tasks for time entry, based on project assignments.
- Report project roles.
- Tag time as billable or non-billable.

Related/Linked Absences

Supports calculating pay for shift workers who take time off. The functionality provides the ability to include time off in time calculations such as shift differentials.

Reporting and Analytics

Supports reporting on consolidated absence and time-tracking data. The functionality provides the ability to:

- Access reports, manager self-service (MSS) tasks, and time-tracking and absence analytics.
- Access team analytics.
- Derive worker eligibility for Time Tracking objects and work schedule calendars.
- Review the variance between workers' reported and scheduled hours over a period.

The functionality provides the ability to report on:

- Absence and time-tracking data.
- Time requests by worker that require preapproval, including overtime.
- Setup configurations.
- Time attendance by worker.
- Time blocks and time clock event details over a specified period.
- Time blocks for workers and time worked by cost center, location hierarchy, or other organizational filters.
- Time exceptions and anomalies.
- Worker time-tracking eligibility by user group.

The functionality includes:

- A global library of sample Time Tracking configurations.
- Troubleshooting reports for setup configurations.

Scheduling

Supports business process definitions for work schedule assignment. The functionality provides the ability to:

- Assign new work schedules to individual workers.
- Automatically assign work schedule calendars based on calendar rules.
- Configure editing permissions for worker schedules.
- Create custom work schedules.
- Create work schedules for worker assignments based on schedule patterns.
- Define regular and flexible hours for workers.
- Define the time of day at which a worker's work day and work week begins.
- Enable manager schedule adjustments by day.
- Generate reported time from work schedules.
- Group work schedule calendars.
- Import worker schedules into Workday from a third-party scheduling application using integrations.
- Monitor and manage worker time.
- Review differences between a worker’s reported and scheduled hours over a period.
- View all time blocks for workers and time worked by cost center or location hierarchy, or other organizational filters.
- View worker time-tracking eligibility by organization.

Tailored Time Entry

Supports configurable time-entry options, automated reminders for time entry and approval, and high-volume time entry.

The functionality provides the ability to:

- Apply effective dating to time entry templates.
- Capture information about workers’ hours for costing and other purposes.
- Define default quantity values for time entries.
- Generate time from schedules and auto-fill from prior week.
- Generate calculated time blocks for Workday Payroll and third-party applications.
- Prevent early check-ins for scheduled shifts.
- Prevent workers from recording time using the Workday mobile application when they’re outside the geofence of a defined location.
- Record the start and end of working hours on desktop and mobile devices.

The functionality includes:

- Business processes to enable workers to request to work time that requires preapproval, including overtime.
- Integrations for time block reporting.
- Time-entry validations.

Time Approvals and Administration

Supports reviewing, correcting, and approving time. The functionality provides the ability to:

- Approve time entry notifications individually or in bulk.
- Bulk enter time for multiple workers.
- Bulk review and approve project and nonproject time entries and time offs.
- Exclude workers on approved leave when creating time blocks for workers.
- Filter on holiday calendars.
- Group time-entry validations.
- Identify time-entry issues during review and approval.
- Manage time calculations for worker eligibility changes.
- Request and approve time off for planning aid (doesn't replace actual time entry).
- View schedules while approving time.

The functionality includes:

- Reports and templates for reviewing time.
- Time and scheduling tasks and reports for managers.

Reference: Time Tracking Hub Capabilities

You can view high-level feature descriptions for the capabilities in this product area.

Auditing

Supports using integrations to import time blocks from third-party time-collection applications into Workday and then using Time Tracking reporting capabilities to gain insight into time data. The functionality provides the ability to:

- Identify workers with duplicate configurations.
- Monitor time for workers.
- Review the creation and modification details for time blocks and time clock events over a specified period.

Communications and Notifications

Supports the ability to configure time-tracking notifications and recurring reminders to:

- Enter, review, submit, and approve time.
- Resolve unmatched time and missing records.

The functionality supports:

- External email and Workday notifications to approve worked time, time off, and requested overtime.
- Mobile reminders to record the end of working time.

Compliance

Integration Services

The functionality provides statutory guidance configuration and sample configuration.

Provides integrations that support extending Workday Time Tracking time entry. The functionality provides the ability to:

- Record the start and end of working time.
- Review and modify records of working time.
- View and create time blocks.
- View period schedules and time entry validations for workers.

Payroll Integration

Supports the integration of time tracking with Workday Payroll and payroll interfaces that enable connection with third-party payroll vendors to send and receive payroll data. The functionality supports payment of time in Workday Payroll or third-party payroll applications and time calculations to generate additional calculated time for payment of:

- Holiday hours.
- Minimum daily or weekly hours.
- Minimum rest hours.
- Overtime.
- Shift differential.

- Statutory holiday hours.

The functionality provides the ability to send time details to payroll such as:

- Approved time for current and prior periods.
- Costing overrides, worktag values, and override rates.
- Reported locations to support U.S. state and local taxation when Workday Payroll for the U.S. is in scope.
- Time in hours, days, or unit-based quantities.

The functionality supports the display of:

- Payroll and pay-period end dates within the time-entry calendar.
- Worker payroll costing allocation within the time-entry calendar.

Project Time Entry/PSA

Supports entering time against multiple projects or project plan tasks. The functionality supports the:

- Review and approval of project time by project managers.
- Use of approved project time for project billing, costing, and management.

The functionality provides the ability to:

- Analyze project time and approve project time for workers.
- Capture standard or fully burdened project costs.
- Configure related worktags for reported project values.
- Filter projects and tasks for time entry, based on project assignments.
- Report project roles.
- Tag time as billable or non-billable.

Related/Linked Absences

Supports calculating pay for shift workers who take time off. The functionality provides the ability to include time off in time calculations such as shift differentials.

Reporting and Analytics

Supports consolidated time and absence reporting. The functionality provides the ability to:

- Access reports and time-tracking and absence analytics.
- Create custom reports with absence and time-tracking data.
- Review differences between a worker’s reported and scheduled hours over a period.
- View all time blocks for workers and time worked by cost center, location, or other organizational filters.
- View worker time-tracking eligibility by organization.

Scheduling

Supports work schedule maintenance. The functionality provides the ability to:

- Assign work schedule calendars automatically to multiple or individual workers and override default work schedules that assign to workers based on calendar rules.
- Define regular and flexible hours for workers in flex work schedules.
- Group work schedule calendars.
- Import workers' schedules into Workday from third-party scheduling applications.

Tailored Time Entry

Supports the ability to import reported time and enable time adjustments by administrators. The functionality provides the ability to:

- Apply effective dating to time entry templates.
- Generate calculated time blocks for Workday Payroll and third-party applications.
- Process reported project time for use in Workday Projects.
- Schedule submission of time.

The functionality supports the use of these configuration setup objects:

- Holiday calendars.
- Period schedules.
- Time code groups.
- Time entry codes.
- Time entry templates.
- Time Tracking eligibility rules.
- Work schedule calendars.

Time Approvals and Administration

Supports administrator adjustments and bulk approval of time. The functionality provides the ability to:

- Bulk review and approve project and nonproject time entries and time offs.
- Identify time entry issues during review and approval.
- Request and approve time off for planning aid (doesn't replace actual time entry).

Legal Notice

Service Warranty

Not Part of the Service

The Workday Administrator Guide includes both general descriptions of features as well as configuration and usage details. The Service warranty in the MSA/UMSA applies to feature descriptions rather than configuration and usage information.

Some Workday Administrator Guide topics describe features or products that are not part of the Service.

These topics begin with a note indicating that they are not part of the Service. In sections where all of the topics cover features and/or products that are not part of the Service, only the first one contains the note.

