Administrator Guide Release Notes

Product Summary

December 18, 2025

workday™

Contents

About Workday Documentation

October 31, 2025

Workday Documentation - In Depth

Release Planning Resources	UPDATED Added What It Is descriptions for Web Services and WDSetup Release Notes sections.
Configuration and How-To Resources	UPDATED Fixed the broken video link.
Translations: Workday Help Centers	UPDATED Added Contract Management to the list of Help Centers.
Translations: Workday Help Centers	UPDATED Added Contract Management to the list of help centers and added a checkmark for Peakon to indicate that the help center content is translated.

October 17, 2025

Workday Documentation Basics

How to Use Workday Documentation	UPDATED Added note for employees that Workday Guides don't generally cover Workday features for personal use, like modifying benefits or changing their banking information.

October 3, 2025

About Workday Release Notes

Find, Filter, and Download Release Notes	UPDATED Added: • Links to step 4 for common date range filter examples. • Descriptions to step 6 for Product Line, Product Area, Retirement, and Change Log columns.

Find, Filter, and Download Release Notes	**UPDATED** Updated Step 2 to clarify using the search bar.
Subscribe to Release Notes	**UPDATED** Added optional step for using product tags.
Reference: Workday Release Center	**UPDATED** In the Feature Delivery and the Release Center Updates section, updated links for: • The Information Experience Enhancements Community article to the new Workday Documentation Announcements page. • Delays and reversions from the retired Community article to a filtered search link in the Release Center.

September 19, 2025

About Workday Release Notes

Concept: What's New in Workday Report	**UPDATED** Clarified date range usage in the Report Filters section.

Adaptive Planning

November 21, 2025

Set Up Adaptive Planning for HCM and Financials

Steps: Configure Adaptive Planning for HCM and Financials	**UPDATED** Modified the steps to include the new UPA method of user sync.
Steps: Configure UPA for Adaptive Planning (For First-Time Implementations)	**UPDATED** new super-step for UPA.
Configure User Provisioning for Adaptive Planning	**UPDATED** new task topic for UPA.
Enable UPA and Validate SSO	**UPDATED**

	New task topic for UPA
Steps: Migrate to UPA from Current User Sync Setup	UPDATED new super-step for migrating to UPA from existing user sync
Steps: Set Up SAML SSO into Adaptive Planning for Synced Users	UPDATED Added inline link in the Next Steps section.
Concept: Unified User Provisioning and Authentication	UPDATED Added new concept for UPA.
FAQ: Unified User Provisioning and Authentication: General	UPDATED New FAQ for UPA.
FAQ: Unified User Provisioning and Authentication: Instance Assignment	UPDATED new FAQ for UPA.
FAQ: Unified User Provisioning and Authentication: Multi-Instances	UPDATED new FAQ for UPA.
FAQ: Unified User Provisioning and Authentication: Sign-In	UPDATED new FAQ for UPA.
FAQ: User Provisioning Workspace	UPDATED new FAQ for UPA.

October 31, 2025

Set Up Adaptive Planning for HCM and Financials

Select Workday Reports in Workday Data Sources for Adaptive Planning	UPDATED Added a table row in Step 3 for the Use enhanced data import check box.

September 19, 2025

Headcount Planning

Steps: Set Up Headcount Planning	UPDATED

	Added ability to plan from top down and clarified how we consolidate My Tasks items.
Create Headcount Plans	UPDATED Added ability to plan from top down and add multiple events to 1 headcount plan.
Add Events to Existing Headcount Plans	NEW How to add events to existing headcount plans.
Manage Headcount Planning Events	UPDATED Added ability to refresh actuals and clarified what happens after you pull forward.
Complete Headcount Planning Participant Detail Events	UPDATED Added ability to plan from top down and new aggregate view.
Create Headcount Forecast Plans	UPDATED Added ability to plan from top down and add multiple events to 1 headcount plan.

Set Up Adaptive Planning for HCM and Financials

Manage Workforce Planning Configurations	UPDATED Added ability to plan by company, cost center, or custom organization. Added requirement that you create some accounts for headcount planning as a next step.

Adaptive Planning and Consolidation

December 12, 2025

Financial Accounting in AP&C

Setup Considerations: Allocations in AP&C	UPDATED Added new Question to Consider to note that Workday doesn't create reversals for cancelled allocations, even when your tenant is configured to create reversals for cancelled operational journals.

November 14, 2025

Financial Accounting in AP&C

Reference: Close and Consolidation Hub Cards in AP&C	UPDATED Updated to provide more details about how Workday populates the hub filters.

October 31, 2025

Financial Accounting in AP&C

Reference: Workday-Delivered Reports for Financial Close in AP&C	UPDATED Updated the description of the View Intercompany Reconciliation report.

October 17, 2025

Financial Accounting in AP&C

Steps: Match Intercompany Journal Lines Manually in AP&C	UPDATED Updated with new step about setting journal lines as available or unavailable for matching.

September 19, 2025

Financial Accounting in AP&C

Concept: Transaction Matching and Unmatching in AP&C	NEW Describes the concept of transaction matching and unmatching in Adaptive Planning and Consolidation (AP&C).
Schedule Matching Run in AP&C	UPDATED Updated to clarify the behavior of the Use Job Run Date for As Of Effective Date and As Of Effective Date options.

Authentication and Security

December 12, 2025

Accounts

Steps: Set Up Unified User Provisioning and Authentication	NEW How to set up unified user provisioning and authentication for Adaptive Planning.
Migrate Planning User Data to the User Provisioning Workspace (UPW)	NEW How to migrate Adaptive Planning user data to the User Provisioning Workspace.

Authentication

Register API Clients for Integrations	UPDATED Added a step on copying the Client ID and Client Secret.
Manage Proxy Access	UPDATED Updated the Results section note to document the Maximum Inactive Days Before Disabling Account limit.
Concept: Proxy Sessions	UPDATED Added a bullet to the Excluded Functionality section on the exclusion of tasks and reports available in target users' constrained proxy sessions.

Configurable Security

Concept: Security Admin Hub	UPDATED Added information on expected behavior for graphs in the Overview section.

Data Privacy

Concept: Purging Person Privacy Data	UPDATED Clarified the expected behavior of purged documents in Production and lower-level tenants.

Setup Considerations: Data Scrambling	UPDATED Updated Connections and Touchpoints section to include another area and relevant task name.

November 14, 2025

Authentication

Example: Administrator Access on Corporate Network Only	UPDATED Updated steps 5 and 6 to include information on providing access to self-service tasks outside of a corporate network.

Configurable Security

Steps: Set Up Security Admin Hub	NEW How to set up and use the new Security Admin Hub.
Example: Add Service Center Quick Actions to the Security Admin Hub	NEW How to add a quick action group and quick action items to the new Security Admin Hub.
Concept: Security Admin Hub	NEW Describes the concept of the Security Admin Hub in Workday.

Data Privacy

Setup Considerations: Data Purging	UPDATED Under Limitations, removed the limitation related to purging a former candidate.

October 31, 2025

Configurable Security

Steps: Change User-Based Security Group Assignments for a User	UPDATED Revised Step 3 to note the support of routing modifiers in the User-Based Security Group Event for User business process definition.

Security for Integrations

Set Up Workday Web Service Authentication	**UPDATED** Updated Step 3 to include a recommendation to use exclusive canonicalization for web service requests.

October 17, 2025

Authentication

Steps: Configure Step Up Authentication	**UPDATED** Added list of unselectable domains in step 4.

Configurable Security

Steps: Change Membership for a User-Based Security Group	**UPDATED** Expanded Step 3 to mention the use of routing modifiers in the configuration of business process definitions.

Security for Integrations

Reference: X.509 Authentication Supported Algorithms	**UPDATED** Updated the Canonicalization table to state which method is recommended for web service requests.

October 3, 2025

Configurable Security

Create Level-Based Security Groups	**UPDATED** Added a note under the Context section based on the customer support feedback.

September 19, 2025

Accounts

Steps: Set Up User Provisioning Workspace	**UPDATED**

	Expanded the Prerequisites section to include more product domains.
Manage Reports for User Provisioning	UPDATED Expanded the Next Steps section to include information on the Sync Report and Configuration Logs.

Configurable Security

Setup Considerations: Configurable Security	UPDATED Expanded the Recommendations section to include a reference to the new Security Admin Hub.
Concept: Configurable Security	UPDATED Added a section on the new Security Admin Hub.

Data Privacy

Reference: Purgeable Data Types	UPDATED In the Financial Entities section, added the purgeable data types for these functional areas: • Customer Accounts • Grants Management

Education and Government

December 12, 2025

U.S. Federal Government

Steps: Configure the Personnel Action Request Business Process	UPDATED • Added a Next Steps section with details on reporting on PAR events. • In the Result section, clarified information on printing the SF-50 and SF-52.

November 14, 2025

Grants Management

Create Effort Certification Types	UPDATED Clarified how routing is determined based on the Routing by Worker Organization Assignments setting.

October 31, 2025

Grants Management

Concept: Facilities and Administration for Awards	UPDATED In the Criteria for Calculating Facilities and Administration section, clarified that when fund is not sponsored but cost-share is enabled, you can generate award costs but not recognize revenue.
Concept: Charge Expenditures to Grants	UPDATED New topic on how to set up the tenant and charge expenditures to a grant.
Example: Set Up Condition Rules to Route Business Processes by Award Status	NEW New topic to illustrate how to set up condition rules to route business processes based on award-related details.
Create Award Billing Schedules	UPDATED On Step 3, added a new row for Do Not Bill Over Installment Total. On Step 6, added a row for Edit Schedule Header. In the Related Information section, added a link to Concept: Award Tasks.
Steps: Create Invoices for Cost Reimbursable Award Transactions	UPDATED On Step 3, add a link to the new topic Schedule Cost Reimbursable Invoice Creation and Printing.
Steps: Set Up Prepaid Installments for Automatic Consumption	UPDATED For accuracy, changed title from Steps: Set Up Prepaid Award Lines for Automatic Consumption to Steps: Set Up Prepaid Installments for Automatic Consumption.

	Added the accounting details for each step. On step 4, described how to create sponsor invoices from the related action of installments.

October 17, 2025

Grants Management

Schedule Cost Reimbursable Invoice Creation and Printing	NEW New topic to describe how to automate sponsor invoice creation for cost reimbursable award lines.

U.S. Federal Government

Steps: Configure the Personnel Action Request Business Process	UPDATED Added a link to Step 2.
Concept: Personnel Action Requests on the Hire Business Process	NEW Describes the concept of Personnel Action Requests on the Hire business process in Workday.
Assign Pay and Grade Retention to Workers	UPDATED We update Step 2 with Compensation Change template information, including instructions on Consolidating Hire templates.

October 3, 2025

Grants Management

Steps: Manage Facilities and Administration Costs	UPDATED In the Steps section, added a short description for each step to make the steps easier to follow.
Steps: Map Spend Categories or Pay Components to Sponsor Expenditure Categories	UPDATED On Steps 1 and 2, elaborated on what each task enables you to do, and clarified that object class mapping only affect new spend transactions. On the row for Default Object Class, added information about using an unmapped default object class.

U.S. Federal Government

Steps: Set Up Personnel Action Request (PAR)	UPDATED Updated table in step 6.
Assign Pay and Grade Retention to Workers	UPDATED Added Compensation Change template information to Prereq section.

September 19, 2025

Grants Management

Reference: Facilities and Administration Spend Transactions	UPDATED In the introduction, added a new paragraph to describe the timing difference in award costs processing when you initiate the transaction through a UI task vs. through a web service. Removed information about award costs processing for web service transactions from individual transaction rows.
Set Up Grants Management Configurations	UPDATED Added configuration for the Allow Pre-Settlement Billing option.
Create Awards	UPDATED On the Copy Line and Copy Grant row, added information on how to hide the button to prevent all users from creating new grants when they create new award lines.
Steps: Charge Expenditures to Grants through Allocation Pools	NEW New topic on charging allocation pool spend transactions to grants.
Concept: Revenue Recognition for Grants	UPDATED Updated the status bullet in the Cost Reimbursable Award Lines section to add a link to award costs processing rules setup.
Reference: Effort Certification Reporting	UPDATED In the Report Data Source section, added a row for Effort Certifications and elaborated on the 2 report fields for Effort Certification attachments.

Reference: Awards Reporting	**UPDATED** Added 2 new sections: • Reporting on Workers Paid on Grants • Reporting on Award Attachments
Reference: Award Costs Reporting	**UPDATED** Changed the topic title from Reference: Award Costs Reports to Reference: Award Costs Reporting. Added a new section on monitoring award costs processing jobs to identify failed jobs.

U.S. Federal Government

Steps: Set Up Personnel Action Request (PAR)	**UPDATED** Added new fields for the Maintain Federal Field Values task.
Set Up Standard Forms for Benefits	**UPDATED** We update this topic with a new step 2, and Next Steps instructions on how to resend SF data to OPM.
Set Up Nature of Action Conditional Data Displays for SF 50	**NEW** We add a new topic for U.S. federal users that explains how to set up nature of action conditional data displays for SF 50 in PAR compensation events.
Example Steps: Create a SF 50 Conditional Data Display for the AUO Nature of Action	**NEW** We add an example topic that provides an example of how to set up an AUO allowance plan to display on SF 50 of a compensation PAR event when a worker undergoes a compensation change.
Assign Pay and Grade Retention to Workers	**NEW** We add a topic detailing how U.S. federal customers can assign pay or grade retention to workers.
Map Absence Types to Pay Status Codes	**NEW** How to map Absence types to pay status codes.
Steps: Set Up OPM Connector: EHRI	**UPDATED** Added information on the new Employee Types attribute.
Concept: OPM Connector: EHRI	**UPDATED**

	Added information on what the integration returns.
Reference: OPM Connector: EHRI Status Integration Fields	UPDATED Added additional details about how the EHRI fields map to Workday.
Reference: OPM Connector: EHRI Dynamic Integration Fields	UPDATED Added additional details about how the EHRI fields map to Workday.
Steps: Set Up OPM Connector: eOPF	NEW How to set up the OPM Connector: eOPF.
Concept: OPM Connector: eOPF	NEW Describes the concept of the OPM Connector: eOPF.

Financial Management

December 12, 2025

Business Assets

Setup Considerations: Asset Tracking	UPDATED For clarity, removed information about asset accounting and asset accounting tasks.
Steps: Set Up Asset Tracking	UPDATED Moved step 4 on asset disposal types to Steps: Set Up Asset Accounting.
Steps: Set Up Asset Accounting	UPDATED • In step 1, updated the list of business processes in the Business Asset Accounting functional area. • Moved information from Steps: Set Up Asset Tracking.
Dispose of Assets	UPDATED Clarified differences between the: • Dispose Assets task. • Dispose Expired Assets task. • Dispose Asset web service.

Financial Accounting

Setup Considerations: Allocations	UPDATED Added new Question to Consider to note that Workday doesn't create reversals for cancelled allocations, even when your tenant is configured to create reversals for cancelled operational journals.

Financial Transaction Taxes

Setup Considerations: 1099 Reporting	UPDATED In the Questions to Consider section, added that Workday excludes information returns with excess golden parachute payment amounts from FIRE electronic files.
Generate 1099 Electronic Files	UPDATED In the Results section, added that Workday excludes information returns with excess golden parachute payment amounts.

Supplier Accounts

Reference: Supplier Invoice Split Screen	UPDATED Added information about viewing the attachment split screen in a separate window, removed a table row for the Split Screen Default Option, and updated content for style and clarity.
Reference: OCR Scanning Failure Reasons	NEW Provides additional information about OCR scanning failure reasons.

November 14, 2025

Business Assets

Steps: Set Up Asset Tracking	UPDATED • Added a step to configure custom objects and fields. • Added next steps to register assets. • Moved information to Steps: Set Up Asset Accounting.
Concept: Asset Tracking Tasks	UPDATED Migrated content from Steps: Track Assets.

Concept: Asset Accounting Tasks	UPDATED Migrated content from Steps: Perform Lifecycle Events for Capital Assets.
Steps: Set Up Asset Accounting	UPDATED • Moved information from Steps: Set Up Asset Tracking. • Added an optional step to configure asset impairment reasons. • Added an optional step to configure asset removal reasons. • Added an optional step to configure a sequence generator. • Clarified next steps.
Record Asset Depreciation and Amortization Expenses	UPDATED Moved information from Reference: Asset Lifecycle Event Availability.
Register Assets	UPDATED • Added information about the Register Assets web service. • Moved information from Steps: Track Assets.
Register Composite Assets	UPDATED Updated next steps.
Assign Asset Accounting Information	UPDATED Moved information from Reference: Asset Lifecycle Event Availability.
Remove Assets	NEW How to remove business assets that you register by mistake.

Financial Accounting

Reference: Close and Consolidation Hub Cards	UPDATED Updated to provide more details about how Workday populates the hub filters.
Define Intercompany Balancing Rules for Balancing Worktags	UPDATED In the Context, clarified which transactions are unsupported.

Projects

Capitalize Project Assets	UPDATED Moved information to Remove Assets.

Supplier Accounts

Steps: Set Up OCR for Supplier Invoices	UPDATED In the Prerequisites Step 4, updated the note for clarity and moved the ISA subscription service agreement value to the 2nd bullet.

October 31, 2025

Customer Accounts

Steps: Set Up Intelligent Prompt Recommendations for Customer Invoices	UPDATED Clarified Step 1 to add substeps.
Steps: Set Up Machine Learning Recommendations for Customer Overpayments	UPDATED Clarified Step 1 to add substeps.

Expenses

Steps: Set Up Recommendations and Defaulting for Expense Items on Scanned Receipts	UPDATED Added data requirement minimum for Workday-provided recommendations.

Financial Accounting

Concept: Cash Basis Accounting	UPDATED Clarified that customer invoices with any tax aren't supported.
Set Up Elimination Rules for Noncontrolling Interest	UPDATED Updated to explain how Workday can calculate indirect NCI even when you select the Direct Ownership Only (Always Select) check box.
Steps: Exclude Wholly-Owned Subsidiaries from Noncontrolling Interest Calculation	UPDATED

	How to configure Workday to exclude wholly-owned subsidiaries when you calculate noncontrolling interest.
Reference: Workday-Delivered Reports for Financial Close	UPDATED Updated the description of the View Intercompany Reconciliation report.

October 17, 2025

Cash

Create Miscellaneous Payment Requests	UPDATED Added a row to the reltable in step 2 to describe the Request Category prompt.

Financial Accounting

Steps: Upload Statistics	UPDATED Updated step 1 to clarify which web service operation to use for the EIB.
Steps: Match Intercompany Journal Lines Manually	UPDATED Updated with new step about setting journal lines as available or unavailable for matching.
Concept: How Transactions Get Balancing Worktags	UPDATED Updated to include information about allocation pools.

October 3, 2025

Business Assets

Setup Considerations: Asset Accounting	UPDATED Renamed from Setup Considerations: Asset Books.
Set Up Asset Book Rules	UPDATED Renamed from Define Asset Book Rules.
Steps: Set Up Multibook Asset Accounting	UPDATED Renamed from Set Up Asset Accounting for Multiple Books.

Add Assets to Company Asset Books	UPDATED Renamed from Add Assets to a Company Asset Book.
Register Assets	UPDATED Added a prerequisite to set up asset tracking or asset accounting.
Register Composite Assets	UPDATED Added a prerequisite to set up asset tracking or accounting.
Assign Asset Accounting Information	UPDATED Added a prerequisite to set up asset accounting.
View Assets	UPDATED Added a prerequisite to set up asset tracking or accounting.
Set Up Asset Shares	UPDATED • Renamed from Create Asset Shares. • Moved information from Set Up Shared Costs of Assets.
Transfer Assets	UPDATED Added a prerequisite to set up asset tracking or accounting.
Adjust In-Service Dates of Assets	UPDATED • Renamed from Adjust an Asset In Service Date. • Added a prerequisite to set up asset tracking or accounting.
Adjust Asset Costs	UPDATED Clarified prerequisites.
Steps: Correct or Adjust Useful Life	UPDATED Added prerequisites.
Impair Assets	UPDATED Clarified prerequisites.
Reclassify Assets	UPDATED Clarified prerequisites.

Dispose of Assets	UPDATED Added a prerequisite to set up asset tracking or accounting.

Cash

Create Ad Hoc Payment Templates	UPDATED In step 5, removed information about accepted currencies for settlement bank accounts.
Create Ad Hoc Payments	UPDATED In step 6, removed information about accepted currencies for settlement bank accounts.

Supplier Accounts

Create Supplier Invoices	UPDATED In Step 3, added a row for a new Landed Costs in Tax check box.
Create a Non-PO Supplier Invoice	UPDATED In Step 3, added a row for a new Landed Costs in Tax check box.
Adjust Supplier Invoices	UPDATED In Step 3, added a row for a new Landed Costs in Tax check box.

September 19, 2025

Accounting Center

Steps: Set Up Tenant for the Prism Data Export REST API	NEW Instructions to set up tenants for PRISM Data Export REST API.
Steps: Export Data from a Prism Data Source	NEW Instructions to export data from a Prism data source using the Data Export REST API.
Concept: Data Export REST API	NEW Guide to use the Data Export REST API.

Reference: WQL Query Usage and Guidelines for Data Export	NEW Information about WQL for data export jobs.
Concept: Studio Integration for Prism Data Export API	NEW Information about Studio integration for Data Export REST API.
Concept: Data Export API Request	NEW Information about Data Export REST API request in the Studio integration for data exports.
Concept: Data Export File Download Request	NEW Information about downloading data export jobs using the Data export Studio integration.
Reference: Data Export API Studio Integration Attributes	NEW Information about Data Export API Studio integration attributes.

Cash

Create Ad Hoc Payment Templates	UPDATED In step 5, added that: • You can only enter settlement bank account details when creating new ad hoc payees. • When creating electronic payments for existing payees, Workday selects the settlement bank account based on payment details.
Create Ad Hoc Payments	UPDATED In step 6, added that: • You can only enter settlement bank account details when creating new ad hoc payees. • When creating electronic payments for existing payees, Workday selects the settlement bank account based on payment details.
Setup Considerations: Miscellaneous Payment Requests	UPDATED Added information about bank routing codes in the Questions to Consider section.
Steps: Set Up Miscellaneous Payment Requests	UPDATED Added optional steps to:

	• Set up bank routing codes. • Hide or show optional fields.
Create Miscellaneous Payment Requests	UPDATED Added information about bank routing codes.
Steps: Set Up Treasury Discovery Board	UPDATED Updated the report name from Maintain Field List for Discovery Boards to Maintain Field List for Reporting.

Customer Accounts

Concept: Customers	UPDATED Added a section about Customer Change History.
Steps: Set Up Gapless Invoice Number Sequencing	UPDATED Added a new optional step 4 about using alternate fiscal schedule, added a new prerequisite, and made step 5 optional.
Setup Considerations: Invoice Netting	UPDATED Added information about direct intercompany netting transaction groups for multicurrency netting.
Steps: Set Up Netting	UPDATED Added information on the Direct Intercompany Netting Rules tab to Step 2.
Create Netting Transactions	UPDATED Updated for style and added information on the invoice eligibility rules to the Supplier Invoices and Customer Invoices section in Step 2.
Create Direct Intercompany Netting Transactions During Settlement	UPDATED For clarity: • Renamed the topic from Create Direct Intercompany Netting Transactions to Create Direct Intercompany Netting Transactions During Settlement. • Added information in the Context section about single and multiple currency netting. • Added a new Step 3 when you use the Create Settlement Run task.
Steps: Set Up Intercompany Multicurrency Netting	NEW

	How to set up intercompany multicurrency netting.
Set Up Direct Intercompany Netting Rules	NEW How to define direct intercompany netting rules.
Create Direct Intercompany Netting Transaction Groups	NEW How to create a direct intercompany netting transaction group.
Concept: Accounting and Netting Transactions	UPDATED Added a new Intercompany Multicurrency Netting section.
Reference: Netting Rules	UPDATED For clarity, added information for single currency netting and direct intercompany netting rules.
Concept: Customer Payments	UPDATED Added information on automatic customer payment applications for customer invoice adjustments and negative invoices with discount payment terms.
Steps: Set Up Customer Accounts Hub	NEW How to set up the customer accounts hub.
Example: Add Report to Customer Accounts Hub	NEW Illustrates how to set up a custom navigation item for the Customer Accounts Hub.
Concept: Customer Accounts Hub	UPDATED Describes the concept of the Customer Accounts Hub in Workday.
Steps: Create Custom Invoice Print Layouts	UPDATED Updated Step 4 to add a link to Create and Publish Document Layouts in Docs for Layouts.

Expenses

Setup Considerations: Payment Elections	UPDATED Updated to include information on banking, Maintain Payment Elections Help Text, Edit Tenant Setup Financials, Manage: Unlock Payment Elections Access, and Maintain Payment Election Options.

Steps: Set Up Payment Elections	UPDATED Added information on Bank Account Verification.

Financial Accounting

Steps: Upload Journals	UPDATED In Step 1, clarified the different web services and when to use them for importing journals.
Setup Considerations: Allocation Plans	UPDATED Updated to include information about setting up exception pools.
Create Allocation Pools	UPDATED Updated to include information about creating exception pools.
Concept: Allocation Pool Web Services	UPDATED Updated to note that you must now use v44.0 or later of the Get Allocation Pools and Put Allocation Pool web service operations.
Concept: Transaction Matching and Unmatching	UPDATED Describes the concept of transaction matching and unmatching in Workday.
Schedule Matching Run	UPDATED Updated to clarify the behavior of the Use Job Run Date for As Of Effective Date and As Of Effective Date options.
Define Intercompany Balancing Rules for Balancing Worktags	UPDATED Removed the example and updated: • The Context and Results to encompass the new functionality and processing for the intercomapny balancing rule. • The table in Step 2 to include the new Balancing Worktag Type prompt and Only Replace Worktags for Invalid Company and Worktag Combinations check box.
Setup Considerations: Multiple Funding Sources	UPDATED Included:

	• A use case on preventing overspend and commitments in the Use Case section. • The new funding source options in the Tenant Setup section. • The limitation that you can only create funding sources for Procurement commitment and obligations ledgers in the Limitations section.
Steps: Set Up Multiple Funding Sources	UPDATED Included the new tenant setting options for funding sources in Step 2.

Project Billing

Set Up Project Billing Configurations	UPDATED Added a step for the new Time tab.
Concept: Set Up Project Billing Configurations	UPDATED Added a section for the new Time tab.
Reference: Project Billing Transaction Ineligibility Reasons	UPDATED Split the ad hoc/capital project transaction row into separate rows, because ad hoc transactions can now be transferred.
Setup Considerations: Percent Complete Revenue Recognition	UPDATED Added information about new Percent Complete by Cost Reconciliation standard report.
Review Percent Complete Calculations for Revenue Recognition	UPDATED Added information about new Cost Details column.
Concept: Project Billing	UPDATED Added a clarifying sentence to the Time Block Adjustments section.

Projects

Concept: Workday Projects	UPDATED Updated the Opportunity row in the table for new Opportunity business process behavior.
Setup Considerations: Create Projects	UPDATED

	Added information about touchpoint with Services CPQ in the Connections section.
Setup Considerations: Project Plans	UPDATED Added information about touchpoint with Services CPQ in the Connections and Touchpoints section.
Steps: Manage Project Budgets with Worksheets	UPDATED Added information about new Schedule Project Budget Workbook Mass Lock task.

Revenue

Create Customer Contracts	UPDATED Corrected the row for Standard Rate Sheet (Projects only).
Amend Customer Contracts	UPDATED Added information about amending contracts originating from quotes.
Change Customer Contracts	UPDATED Added information about changing contracts originating from quotes.
Concept: Customer Contracts from Quotes	NEW Describes the concept of customer contracts originating from quotes in Workday.
Reference: Contract Line Types for Customer Contracts	UPDATED Added information about the supported contract line types for contracts that originate from quotes.
Steps: Manage Customer Invoice Proposals	UPDATED Added information about custom objects on invoice proposals.
Create Customer Invoice Proposals	UPDATED Added information about the Schedule Create Customer Invoice Proposal task, and about custom objects on invoice proposals.
Concept: Customer Invoice Proposal Workspace	UPDATED

	Added information about custom objects on invoice proposals.
Steps: Set Up Revenue Hub	NEW How to set up the Revenue Hub.
Concept: Revenue Hub	NEW Describes the concept of the Revenue Hub in Workday.

Services CPQ

Setup Considerations: Services CPQ	UPDATED Added information about new webservices, business process, and requirements.
Steps: Set Up Quote	UPDATED Added information about setting up the business processes in Step 1.
Concept: Quote Spreadsheet Setup	UPDATED Updated information to include copy and pasting with WBS data elements.
Steps: Create Services Catalog	UPDATED Added information about the ability to add phases to services in the services catalog.
Design Document Layout	UPDATED Added information about the ability to add subtotals in quote tables.
Steps: Create Quote	UPDATED Added information about the ability to copy quotes across opportunities in Step 7. Added information about configuring Opportunity Event business process in the Prerequisite section.
Steps: Add Services from Services Catalog	UPDATED Added information about the ability to add services with Effort Estimation of With Phases in the services catalog.
Concept: Opportunity in Quotes	UPDATED

	Added new sections to describe opportunity statuses and opportunity business process behavior.
Concept: Downstream Impacts from Quote	UPDATED Added information about contracts with a single rate for a role.
Concept: Downstream Impacts from Quote	UPDATED Added information about downstream impact on project plan creation.

Settlement

Setup Considerations: Settlement	UPDATED Added information about: • Bank routing codes in the Questions to Consider section. • The Consolidate Supplier Payments On Behalf of Multiple Companies option and Enable IBAN Validation for Payment Elections and Settlement Bank Accounts options in the Tenant Setup section.
Steps: Set Up Settlement	UPDATED Added a step to set up bank routing codes.
Set Up Payee Bank Account Validation Overrides	UPDATED • Renamed from Define Payee Bank Account Validations. • Added examples of payee bank accounts. • Added information about the Format Validator and Populate from Legal Name options. • Added next steps.
Set Up Bank Routing Codes	NEW How to set up bank routing codes.
Define Bank Routing Rules	UPDATED Added information about bank routing codes.
Concept: Settlement Processing	UPDATED Added bank routing codes as a payment grouping criterion in the Payment Groups section.
Reference: Settlement Run Items and Payments	UPDATED

	Added information to the Supplier Invoices section for ad hoc separate payments.

Supplier Accounts

Create Supplier Invoices	UPDATED Added rows for: • Bank Routing Code • Separate Payment
Create a Non-PO Supplier Invoice	UPDATED Added rows for: • Bank Routing Code • Separate Payment
Adjust Supplier Invoices	UPDATED In Step 4, added a row for Bank Routing Code.
Concept: Supplier Invoices	UPDATED In the Manage Supplier Invoices section, added Bank Routing Code as a field you can change using the Mass Change Approved Supplier Invoices task.
Steps: Set Up OCR for Supplier Invoices	UPDATED In Step 5, added rows for Freight Option and Default Spend Category for Freight Options, as well as information for a Non PO option when disabling OCR line level scanning.
Create Recurring Supplier Invoices	UPDATED In Step 3, added a row for Separate Payment.
Create a Down Payment Invoice from a Supplier Invoice	UPDATED In Step 3, added rows for: • Bank Routing Code • Separate Payment
Create a Down Payment Invoice from a Purchase Order	UPDATED For clarity, combined Steps 2 and 3. In the now Step 4, added rows for: • Bank Routing Code • Separate Payment

Human Capital Management

December 12, 2025

Absence

Setup Considerations: Absence Management	UPDATED In the Integrations section, updated the consideration for the Import Time Off Request Event Batch web service.
Setup Considerations: Absence Calendar Experience	UPDATED In the Questions to Consider section, for the “After you terminate workers, do you want to enable managers or Absence administrators to manage their absence history?” question, added the list of initiating actions in the Considerations column.
Setup Considerations: Time Off	UPDATED In the Integrations section, added detailed considerations for the Import Time Off Request Event Batch web service.
Example Steps: Configure Parental Leave as Time Off	NEW Illustrates how to set up a time off plan for parental leave that workers are eligible for each period if they have at least 1 dependent under the age of 4 in that period.
Example: Configure a Parental Leave Upper Limit	NEW Illustrates how to configure a series of nested calculations to calculate the Time Off Plan Balance Upper Limit value for a time off plan.
Example: Create a Worker Eligibility Rule for Parental Leave	NEW Illustrates how to create a worker eligibility rule for a parental leave time off plan.
Example: Configure an Accrual for Parental Leave	NEW Illustrates how to configure a series of nested calculations for an accrual calculation value that adds to the balance for a time off plan for parental leave.
Example: Create a Time Off Plan for Parental Leave	NEW Illustrates how to set up a time off plan for parental leave.

Example: Create an Absence Balance	NEW Illustrates how to create an absence balance to calculate the balance for a parental leave time off plan as of the prior calendar month.
Example: Configure an Accrual Adjustment for Parental Leave	NEW Illustrates how to configure a series of nested calculations to calculate an accrual adjustment value that adjusts the balance for a time off plan for parental leave.
Example: Add an Accrual Adjustment to the Plan	NEW Illustrates how to add an accrual adjustment to the time off plan.

Benefits

Create Enrollment Events	UPDATED Corrected the task name in Step 8 - Restricted by Reason from Create Leave of Absence Rule to Create Leave Type.

Country-Specific Information and Reporting

Send Self-Identification of Disability Invitations	UPDATED Updated step 3 to clarify the impacts of using the Organization prompt or the Worker prompt.

Employee and Manager Self-Service

Steps: Set Up Employee Self-Service	UPDATED Fixed broken link to the Workday Community: Adoption Kit article.

HCM Hubs

Setup Considerations: Manager Insights Hub	UPDATED In the Questions to Consider section, updated details about sharing career paths and AI-generated development items.
Reference: Manager Insights Hub	UPDATED Added cards and sections for generating development items for workers and viewing shared career paths.

HCM Innovation Services

Steps: Set Up Workday Assistant	UPDATED Clarified uMSA customer information.

Learning

Steps: Waive Learning Assignments	UPDATED Updated the Context section to add information about automatically waived assignments.
Concept: Learning Assignments	UPDATED Updated the Automatically Waived Learning Assignment status to include a new scenario.

Recruiting

Create External Career Sites	UPDATED Updated the Next Steps section to clarify external career site deletion parameters.
Steps: Manage Interviews	UPDATED Added information about AI-Generated Interview Feedback Summary in step 9.

Staffing

Steps: Set Up Job Changes	UPDATED In the Next Steps section, added information about out of order insertions for job changes.
Set Up Out of Order Insertion for Job Changes	NEW Describes the concept of out of order insertions for job changes in Workday.
Concept: Out of Order Insertion	UPDATED Added information about out of order insertions for job changes.
Concept: Out of Order Insertions for Job Changes	NEW Describes the concept of out of order insertions for job changes in Workday.

Talent

Concept: AI-Generated Development Items	NEW AI-generated development items in the Career Hub and Manager Insights Hub.
Steps: Enable AI-Generated Development Items	NEW Setup steps for enabling AI-generated development items in the Career Hub and Manager Insights Hub.
Setup Considerations: Career Hub	UPDATED Updated details about AI-generated development items in the Career Hub.
Steps: Set Up Career Hub	UPDATED In step 5, clarified security domains required for the Career Hub. Added option step 10 for setting up AI-generated development items in the Career Hub.
Concept: Career Hub	UPDATED Updated details about AI-generated development items in the Career Hub.
Concept: Career Path Builder	UPDATED Added the Sharing Career Paths section.
Reference: Career Hub Security	UPDATED Updated details about AI-generated development items in the Career Hub. Noted which domains are required for Career Hub and Career Path Builder.
Concept: Flex Teams	UPDATED Rewrote content for clarity and depth. Added Flex Teams and Opportunity Marketplace section to provide details on machine learning functionality available with different implementations
Print Employee Reviews	UPDATED Changed the Steps section to be numbered steps instead of unordered steps.
Steps: Set Up AI-Generated Feedback Suggestions	UPDATED How to set up AI-generated feedback suggestions for requested feedback.

Steps: Set Up Succession	UPDATED
Concept: Talent Highlights	UPDATED Updated details about maximum limits on source data for AI assistance.

Time Tracking

Set Up Time Entry Templates	UPDATED Added to the note in step 7 that we recommend you don't enable editing check-in and check-out times and enable end of shift time attestations on the same time entry template.
Set Up Calendar Totals	UPDATED In the Context section, added content about calculated time offs.
Set Up Time Shift Options	UPDATED Added content on calculated time offs.
Steps: Set Up Time Requests	UPDATED Added an optional step 8 to enable mass time requests.
Concept: Time Requests	UPDATED Added: • A bullet to the first paragraph explaining that managers can submit a single time request to cover multiple workers. • A row for Time Day to the table in the Reporting section.
Create Integration System User for Time Kiosk	UPDATED Added information about using the correct user name in step 2.
FAQ: Time Kiosk	NEW Answers frequently asked questions about the Workday Time Kiosk.
Steps: Set Up Calculated Time Offs	UPDATED In Step 4, added a note in the description for the Enable Crossing Midnight option on how to create a calculated time block for a time off that crosses midnight.

Concept: Calculated Time Offs	UPDATED Added content for calculated time offs that cross the week breaker.
Setup Considerations: Time Attestations	UPDATED In the Limitations section, added that this feature isn't compatible with enabling workers to edit their check-in and check-out times.
Mass Submit Time	UPDATED In the Context section, added the need to mass submit both weeks when mass submitting time offs that cross the week breaker.
Adjust Calculated Time	UPDATED In the Context section, added a consideration for calculated time offs that cross the week breaker.

November 28, 2025

HCM Hubs

Reference: HCM Hubs	NEW Information and links to HCM hubs.

Learning

Steps: Manage External Learning Instructors and Assessors in Bulk	NEW How to activate and deactivate external learning instructors and assessors in bulk.
Steps: Manage Internal Learning Instructors and Assessors in Bulk	NEW How to activate and deactivate internal learning instructors and assessors in bulk,

Talent

Create Development Items	UPDATED In the Next Steps section, clarified how to edit development items.

November 14, 2025

Absence

Setup Considerations: Absence Management	UPDATED Added a new section with recommendations for Absence deployments in the UK.
Example: Bulk Load Time Off Requests into Workday	UPDATED In the Scenario section, added recommendations for performant data loads.
Concept: Importing Time Off Request Events	UPDATED Added recommendations for performant data loads.
Steps: Transfer Time Off Balances	UPDATED Revised to add more context details to each step.

Benefits

Generate Help Article for Benefit Plan	UPDATED Updated to add additional benefit plan types you can generate Help articles for.
Reference: Worklets and Reports for Affordable Care Act Compliance	UPDATED Removed references to the Affordable Care Act dashboard, which has been retired.

HCM Innovation Services

Create Articles	UPDATED Updated the list of languages to You can create articles in any language that you have enabled in Workday. Updated the choice table to reflect new version history feature in the article editor.

Learning

Steps: Manage Learning Content	UPDATED Updated the step 2 to add security information to create revenue categories.

Setup Considerations: Extended Enterprise Learning	UPDATED Updated the Questions to Consider section to clarify that Extended Enterprise Learning subscription isn't required to create external learning instructors or external learning assessors.

Recruiting

Steps: Set Up Candidate Skills Match	UPDATED • In Step 1, updated link name. • Added a Related Information link to the Workday AI Fact Sheet.
Concept: Purging Recruiting Data	UPDATED Added that Pre-Hires and Pre-Hires with a candidate profile to the examples of tenant data type that can be purged.

Skills and Skills Cloud

Steps: Set Up Skill Endorsements and Ratings	UPDATED Corrected Results section, workers can select up to 100 skills.

Talent

Configure Career Path Builder	UPDATED In Step 3, added details about filtering suggestions by job family or job family group.
Concept: Career Path Builder	UPDATED In the Maintain Career Hub and Opportunity Marketplace section, added details about filtering suggestions by job family or job family group.

Time Tracking

FAQ: Time Requests	UPDATED Added a question about viewing time requests on the time entry calendar.
Set Up the Workday Time Kiosk App	UPDATED

	Updated Prerequisites to note that the Time Kiosk app for iOS is accessible only through the direct link, not through search.
Set Up the Edit and Approve Time Report	UPDATED In the Disable Autofill row or step 3, added detail about matching out times to check-ins.

October 31, 2025

Absence

Setup Considerations: Absence Calendar Experience	UPDATED In the Limitations section, removed the mention of not being able to configure help text for the Manage Absence report, since help text on the Manage Absence calendar is now supported.
Example: Identify Primary Position for Time Off Approval	NEW
Setup Considerations: Time Off Adjustments	UPDATED In the Business Processes section for the consideration of the Change Job business process, replaced the Automated Time Off Adjustment service step with the correct service step name, Automated Accrual Adjustment.

Recruiting

Concept: Social Sign In for Candidate Accounts	NEW New topic for the social sign in feature.
Enable Social Sign in for Candidate Accounts	NEW New topic for social sign in feature.

Staffing

Setup Considerations: Form I-9 for Remote Hire	UPDATED In the Questions to Consider section, clarified that authorized representatives must be external.
Steps: Set Up Electronic Form I-9 for Remote Hire	UPDATED In Step 3, moved details about the shared participation step to a substep.

Talent

Steps: Set Up Career Hub	UPDATED In Step 2, clarified the descriptions of Innovation Services data categories. In Step 7, noted that the *Manage Mentorship* business process is optional.
Steps: Set Up Talent Marketplace	UPDATED In Step 2, clarified the descriptions of Innovation Services data categories.
Mass Print Talent Cards	UPDATED In the Next Steps section, removed references to the Talent Card for Worker and Talent Card for Review tasks, and added instructions about adding talent cards to worker profiles.

Time Tracking

Reference: Worktag Precedence in Time Entry	UPDATED Added detail about worktag values imported from the Workday Time Kiosk and third-party clocks to the first row of the Precedence Criteria table.

October 17, 2025

Absence

Steps: Set Up Time Offs	UPDATED Added a note in Step 1 to clarify that the fields within the tabs are effective-dated.
Create Time Offs	UPDATED Added a note in Step 1 to clarify that the fields within the tabs are effective-dated.
Create Time Offs	UPDATED Clarified when you can select start and end time related entry options.
Concept: Time Off in Workday Assistant	UPDATED

	Corrected the name of the initiating action to Correct Time Off Entry (REST Service).
Enter Time Off Requests	UPDATED In Step 5, clarified how to hide the Comment field for all users or specific security groups.

HCM Hubs

Reference: Manager Insights Hub	UPDATED In the Time & Scheduling section, added new information to the Security column for the Request Absence task and the Manage Absence report.

Learning

Steps: Set Up Cloud Connect for Learning Using Cloud Connect for Learning Platform	UPDATED Renamed the topic and updated the steps for clarity.
Steps: Set Up Cloud Connect for Learning Using Legacy Tasks	UPDATED Renamed the topic and updated the steps to include only legacy tasks.
Concept: Cloud Connect for Learning Integration Methods	NEW Provides an overview of Cloud Connect for Learning integration methods.
FAQ: Cloud Connect for Learning	NEW Answers frequently asked questions about setting up Cloud Connect for Learning.

Recruiting

Setup Considerations: Duplicate Candidate Merging	UPDATED Recommendations for using the Bulk Import Put Candidate web service.

Talent

Setup Considerations: Performance Reviews	UPDATED Adding cross reference to Setup Considerations: Manager Insights Hub in Connections and Touchpoints section.

Steps: Set Up Mass Operation Feedback Events	UPDATED Updated steps 1 and 4 to clarify business process security policy configuration and custom report creation.

Time Tracking

Set Up Time Entry Templates	UPDATED In step 3, added a recommendation to include the default time entry code in a time code group that the worker is eligible for.
Steps: Set Up Time Requests	UPDATED Renamed the Self-Service: My Time and Worker Data: My Team's Overtime domains in Step 4 to Self-Service: My Time Requests and Worker Data: My Team's Time Requests, respectively.
Steps: Set Up Workday Time Kiosk	UPDATED Added an optional step 6 with a link to time attestation setup.
Concept: Time Kiosk	UPDATED Added: • Additional languages to the list of languages supported. • Time attestations to the list of features that the Workday Time Kiosk supports.
Enter Time Requests for Worker	UPDATED In the Next Steps section, included the security domain for the Review and Approve Time Requests report.

Workday Scheduling

Steps: Set Up High-Level Scheduling Organizations	UPDATED Updated Include Members of Subordinate Organizations row. Changed option title to Include Members Based On Organization and edited description.
Steps: Set Up Predictive Scheduling	UPDATED Added a Results section. Added new step after step 1. Added bullet point to step 2 which is now step 3.

October 3, 2025

Absence

Setup Considerations: Absence Calendar Experience	UPDATED Added: • More information on the option to revert the automatic label change in the Platform and Product Extensions row in the Connections and Touchpoints section. • Limitation that QuickTips on the Guidance Workspace doesn't currently support the Request Absence task.
Steps: Set Up Time Offs	UPDATED Added new step 6 for Forfeiture Options tab with link to Setup: Enable Forfeiture Adjustments.

Compensation

Reference: Benefits and Pay Hub	UPDATED Added configuration information to verify the hub displays where expected.

HCM Hubs

Steps: Set Up Manager Insights Hub	UPDATED Updated the name of gigs to flex teams.

Skills and Skills Cloud

Steps: Set Up Skills Fit Analysis	NEW How to set up the Skills Fit Analysis report.
Steps: Set Up Mass Populate Skills for Workers	NEW How to configure the Mass Populate Skills for Worker task.

Time Tracking

Set Up the Workday Time Kiosk App	UPDATED In step 11, clarified how worktag values populate when you don't configure them in the Time Kiosk settings.

Create Rules for Meals and Breaks	UPDATED For step 3: • In the Rule row, added a recommendation specific to Workday Scheduling. • In the note, changed the last sentence to indicate that Workday now creates a schedule in this example.

Workday Scheduling

Steps: Set Up High-Level Scheduling Organizations	UPDATED Added detail to the Meal Break Rule Set row in step 2.
Concept: Mass Add Shifts	UPDATED Added note. Updated title from Concept: Add Shift Modal to Concept: Mass Add Shifts. Replaced references to the Add Shift Details modal with Mass Add Shifts modal.

September 19, 2025

Absence

Setup Considerations: Absence Management	UPDATED Added the use case of configuring Absence business processes to dynamically generate editable documents when workers access tasks that initiate the configured business processes.
Steps: Set Up Document Generation for Absence Business Processes	UPDATED How to configure Absence business processes to dynamically generate documents.
Setup Considerations: Absence Calendar Experience	UPDATED Added: • Recommendation to review configuration in the business process security policies of the Absence Calendar Experience in the Recommendations section. • Option to revert the automatic label change in the Platform and Product Extensions row in the Connections and Touchpoints section.
Setup Considerations: Time Off	UPDATED

	Added consideration to the Correct Time Off and Request Time Off business processes. You can configure them to dynamically generate editable documents when users initiate tasks on the business processes.
Create Time Offs	UPDATED Under: • Step 1, added new Option and Description in 4th row titled Enable Forfeiture for Time Off Adjustment. • Step 2, revised the table to include a description for the Default Start and End Time from Schedule check box. Also, removed the note that the Enable Crossing Midnight check box is disabled if time calculation tags are selected, since we now support calculated time offs crossing midnight.
Create Time Off Plans That Track Balances	UPDATED Added new item to Step 15: Time Off for Forfeiture Adjustment.
Create Time Off Plans That Track Balances	UPDATED On Step 3, noted that you can configure multiple jobs for both contingent workers and employees.
Create Time Off Plans That Don't Track Balances	UPDATED On Step 3, noted that you can configure multiple jobs for both contingent workers and employees.
Setup Considerations: Buy Time Off	UPDATED Added consideration of configuring the Buy Time Off business process to dynamically generate editable documents when a worker buys time off.
Steps: Set Up Buy Time Off	UPDATED In Step 5, added the optional substep to configure the Buy Time Off business process to dynamically generate editable documents when workers buy time off.
Steps: Set Up Sell Time Off	UPDATED In Step 6, added the optional substep to configure the Sell Time Off business process to dynamically generate editable documents when workers sell time off.
Setup Considerations: Time Off Adjustments	UPDATED

	Added consideration of configuring the Correct Time Off business process to dynamically generate editable documents when users adjust time off for a worker.
Concept: Forfeiture Adjustments	**NEW** Added new concept topic
Steps: Enable Forfeiture Adjustments for Time Off Plans	**NEW** New topic
FAQ: Forfeiture Adjustments	**NEW** Added new FAQ topic
Create Absence Tables	**UPDATED** For clarity, updated Step 5 to include all of the entry options and their related check box descriptions in a single table.
Setup Considerations: Leave of Absence	**UPDATED** • Updated the Questions to Consider section to mention custom fields in relation to details that workers can enter when requesting leave of absence. • Added the Set Up: Maintain Additional Fields domain to the Security section. • In the Business Processes section, added the consideration of configuring the Request Leave Of Absence and Request Return from Leave of Absence business processes to dynamically generate editable documents when users initiate tasks on the configured business processes.
Steps: Set Up Leave of Absence	**UPDATED** In Step 1, added the optional substep to configure the business processes to dynamically generate editable documents when users initiate tasks on the configured business processes.
Create Leave Types	**UPDATED** On Step 2, for Position Based, noted that you can configure multiple jobs positions for both contingent workers and employees.
Create Leave Types	**UPDATED** Revised Step 9 to mention the Label Override field, the ability to create custom additional fields using the Maintain Additional Fields task, and the required security domain.

Concept: Leave of Absence Business Processes	UPDATED Updated table to be in ascending order, based on the first column, and added a Generate Documents row, since Workday now supports Document Generation for the 2 business processes for leaves of absence.
Steps: Manage Absence Cases	UPDATED In Steps 1 and 2, added the optional substep to configure the business processes to dynamically generate editable documents when users initiate tasks on the configured business processes.

Benefits

Generate Help Article for Benefit Plan	NEW We add a new topic detailing how to generate help articles for your healthcare benefit plans.
Create Enrollment Event Rules	UPDATED

Compensation

Steps: Propose Compensation for Employees or Positions	UPDATED Added optional prereq to configure tenant to remove prior compensation for previously terminated rehires.
Concept: Remove Prior Compensation for Rehires	NEW We add a new concept topic discussing the Remove Prior Compensation for Rehires tenant setting.
FAQ: Compensation Defaulting	UPDATED Added information on removing prior compensation for rehires to the Why Do Rehired Employees Have Current Assignments? section.
Concept: Out of Order Compensation Changes	UPDATED Updated to account for simultaneous In Progress Request Compensation Change events for the same worker.
Setup Considerations: Compensation Reviews	UPDATED Added Process: Compensation Review Rule Based Access domain to the security section.

Steps: Prepare for Compensation Reviews	UPDATED Added information on the new Process: Compensation Review Rule Based Access security domain

HCM Hubs

Reference: HCM Admin Hub	UPDATED Provides additional information about the HCM Admin Hub.
Setup Considerations: Manager Insights Hub	UPDATED • Added Time Tracking and Workday Scheduling to the Connections and Touchpoints section. • Added Workday VNDLY to Connections and Touchpoints section. • Added information about Contingent Workers and Workday VNDLY to Questions to Consider section. • Added information about Calibration to the Questions to Consider and Connections and Touchpoint sections.
Steps: Set Up Manager Insights Hub	UPDATED • Added Time Tracking and Workday Scheduling functional areas. • Added new optional step for setting up the VNDLY contingent worker team.
Reference: Manager Insights Hub	UPDATED • Updated Overview section to include new Time & Scheduling cards and actions. • Updated Time & Scheduling section to include new sections. • Added new Contingent Worker Team section. • Updated Performance section to include new Calibration functionality. • Added information for the new Calibration tab in the My Team section. • Updated the Budget and Resources section to include new Advanced Compensation functionality.
Reference: Manager Insights Hub	UPDATED Added information on the Hire Employee and View Matrix Organization buttons.

HCM Innovation Services

Steps: Set Up Email Case Creation	UPDATED

	Updated the steps section with additional context for email case creation and calculated fields.
Set Up Help Case Information	UPDATED How to configure the information that displays on your help cases.
Bulk Article Upload	UPDATED How to bulk upload Knowledge articles.

Learning

Setup Considerations: Learning Lessons	UPDATED Added information on the new Acknowledgment lesson type.
Steps: Set Up Learning Content Description Generation and Revision	NEW Instructions to set up AI-assisted options to revise digital and blended course descriptions.
Create Learning Courses	UPDATED Added information on the new Acknowledgment lesson type.
Create Learning Programs	UPDATED Added information on enforce content order in programs.
Create Observational Checklists	NEW Instructions to create an observational checklist.

Recruiting

Steps: Set Up Constrained Prospect Security by Country	NEW Created a new topic that gives step by step guidance to configure this feature.
Concept: Guidelines for Constrained Prospect Security by Country	NEW Created a new topic.
Steps: Set Up Conversational Messaging for Candidates	UPDATED In the Next Steps section, added My Conversations as an option for where Workday sends conversational notifications.
Concept: Candidate Conversational Messaging for SMS	UPDATED

	In the Hiring Team Experience section, added My Conversations as an option for where Workday sends conversational notifications.
Steps: Set Up Candidate Work Availability	NEW New topic on how to set up time slots for candidate work availability.

Skills and Skills Cloud

Steps: Maintain Skill Categories	UPDATED Added information about Workday-delivered skill categories and skill category groups. Removed the word Item from report and task names.
Reference: Skills Terminology	UPDATED Removed Item from skill category and skill category groups.
Enable Skills Cloud	UPDATED Updated description of Enable Skills Self-Assessment on Worker Profile option for clarity.
Steps: Set Up Workday-Delivered Skill Categories and Skill Category Groups	NEW How to set up Workday-delivered skill categories and skill category groups.
Steps: Set Up Skill Level	UPDATED Updated the Prerequisites section and added step 2 in the Steps section to give details on enabling skill level sources.
Maintain Skill Level	UPDATED • Updated the Prerequisites section and included a cross reference to Steps:Set Up Skill Level. • Updated the Context section to add clarity. • Updated step 2 to add descriptions of Skill Assessment Ratings and Self-Assessments.
Concept: Skill Assessments	UPDATED • Updated the Use Cases section to include skill assessments as a skill level source. • Updated the Reporting section to include report fields on the New Skill business object.
Concept: Automated Skill Management	UPDATED

	Added information about how Workday: • Retains all comments when Skills Cloud skills merge. • Deletes maintained skills that you mark as duplicates of other maintained skills.

Staffing

Setup Considerations: Job Architecture Hub	NEW Information to consider before setting up the Job Architecture Hub.
Steps: Set Up Job Architecture Hub	NEW How to set up the Job Architecture Hub.
Reference: Job Architecture Hub	NEW Reference for the Job Architecture Hub.
Steps: Set Up Similar Existing Job Profiles	NEW How to set up the report on similar existing job profiles on the Manage Job Profile business process.
Setup Considerations: Collective Agreements	UPDATED Added Payroll for Australia touchpoint.
Setup Considerations: Form I-9 for Remote Hire	UPDATED Updated the topic to reflect that you no longer need to create an external site for external authorized representatives.
Steps: Set Up Electronic Form I-9 for Remote Hire	UPDATED Removed reference to the external site.
Steps: Set Up Job Changes	UPDATED Updated step 13 to clarify how to hide the Close the Current Position? field.
Concept: Job History	UPDATED Added the View All Jobs report.

Talent

Steps: Set Up Goals	UPDATED Removed opt-in steps for card format for goals.

Set Up Goals for Employee Reviews	UPDATED Removed reference to Guided Experience editor.
Create or Edit Individual Goals	UPDATED Removed Goal User Experience Redesign text.
Setup Considerations: Talent Marketplace	UPDATED • Added details in the Questions to Consider and Security sections about including Flex Team hosts as additional managers in performance reviews. • Added details in the Questions to Consider section about enabling flex teams for contingent workers. For flex teams features that support contingent workers, updated topic to refer to workers instead of employees. • Updated the name of the Flex Teams report to Manage Flex Teams.
Steps: Set Up Security for Talent Marketplace	UPDATED Added information in the Context section and updated the steps to include configuring security for contingent workers on Flex Teams.
Steps: Set Up Flex Teams	UPDATED • Updated the Context and Steps sections to change employees to workers, since flex teams can now support contingent workers. • Added optional Step 10 for including Flex Team hosts as additional managers in performance reviews. • Updated the name of the Flex Teams report to Manage Flex Teams.
Create Flex Teams	UPDATED • Removed sentence from Next Steps section stating that flex team members must be employees. • Updated the name of the Flex Teams report to Manage Flex Teams.
Promote Flex Teams	UPDATED Updated the name of the Flex Teams report to Manage Flex Teams.
Cancel Flex Teams and Flex Team Roles	UPDATED Updated the name of the Flex Teams report to Manage Flex Teams.

Concept: Flex Teams	UPDATED Added Flex Team Hosts section. Updated the topic title.
Reference: Employee Review Template Details Fields	UPDATED Removed Default Editor Option in Template Details table.
Define Help Text for Employee Reviews	UPDATED Removed Guided Editor and Summary Editor content.
Concept: Employee Review Guided Experience Editor	UPDATED Removed Guided Editor and Summary Editor information.
Concept: The Employee Review Process	UPDATED Removed Guided Editor and Summary Editor information. Corrected Autosave information.
Setup Considerations: Performance Reviews	UPDATED Added Get Additional Manager Evaluation for Performance Review to Business Process section. In Questions to Consider, clarified information about additional managers and reviewers.
Concept: Additional Manager Evaluations	UPDATED Added information about flex team hosts to the Get Additional Manager Evaluation section.
Steps: Set Up Succession	UPDATED Updated step 3 to include set up options.
Steps: Set Up Succession Planning in HR Partner Hub	NEW How to configure succession planning in HR Partner Hub.

Time Tracking

Set Up Time Entry Templates	UPDATED • Added a step for the new Worker Edits for Check In and Check Out Tasks section. • Added a note to step 8.
Set Up Time Submission	UPDATED Added Hide All Current Time row to table.

Set Up Time Entry Templates for Enter Time by Type (New!)	NEW How to set up time entry templates for more efficient project time entry.
Steps: Set Up Geofences for Mobile Time Entry	UPDATED Added a note to the Context section.
Concept: Project Time Entry	UPDATED In the Billable Projects section, added information on preventing time block deletion for project billing.
Concept: Time Shifts	UPDATED Added information about how a time shift can be defined, and time calculations in the Shift Date section.
Change Time Kiosk Settings	UPDATED Added detail to the Context section and step 3.
Steps: Set Up Calculated Time Offs	UPDATED Added Enable Crossing Midnight option in Step 4.
Concept: Calculated Time Offs	UPDATED Added content to the Shift Date for Calculated Time Offs section, and added these new sections: • Calculated Time Offs and Absence Tables. • Calculated Time Offs Crossing Midnight.
Enter Time for Worker Using Enter Time by Type (New!)	NEW How to enter time for projects using Enter Time by Type (New!).
FAQ: Enter Time by Period	UPDATED In the answer to the second question, added a bullet for the Period Only option.
Concept: Enter Time by Period	UPDATED • Added Enter Time by Type (New!) to the list of time entry methods. • Replaced the last sentence with the new period calendar view configuration options.
Set Up the Edit and Approve Time Report	UPDATED

	Added a new step 3 about collapsing the summary card, hiding scheduling data, and disabling autofill.
Concept: Edit and Approve Time	UPDATED Updated information on employee's contact information.
Concept: Edit and Approve Time	UPDATED Added a bullet about managers being able to view workers' scheduled hours alongside their reported time.

Workday Scheduling

Concept: Mass Edit Shifts	UPDATED Added note regarding bulk editing shifts.

Worker Information

Steps: Set Up Personal Information Fields	UPDATED Added Region of Birth to Step 7.

Integrations

December 12, 2025

Document Transformation Connector

Reference: Date/Time Attributes for Document Transformation	UPDATED Added information about time zones.

Enterprise Interface Builder (EIB)

Concept: Hire Employee EIB	UPDATED Corrected Hire BP functional area.

Global Payroll Connect

Create External Payroll Vendor Mapping	UPDATED

	Expanded the Context section and Step 4 and added a Next Steps section to provide more information on managing private key pairs.
Setup Considerations: Data Changes on Demand	UPDATED Updated the Limitations section for information for time tracking and time off.
Reference: Data Sections for Data Changes on Demand	UPDATED Added time off earnings and deductions, grouped time off earnings and deductions, and time tracking data sections.
Reference: Third-Party Payroll Reporting	UPDATED Added notes on the reports with computed data sources.

Launch and Manage Integrations

Example: Schedule Integration for Last Day of Each Calendar Quarter	UPDATED Added information about time zones.

Student Connectors

Concept: National Student Clearinghouse Connectors	UPDATED Added information about excluding students with multiple programs of study.
Concept: Student Financial Aid Connectors	UPDATED Added information about values that Workday outputs based on the integration launch timestamp in rows for these integrations: • Alternative Loan Application Send Outbound • Alternative Loan Application Change Send Outbound • COD Campus Based Outbound • COD Outbound In the Launch/Schedule Options section, added a recommendation for scheduling integration launches when you have multiples of the same integration.

Workday Payroll Connectors

Steps: Set Up Irish Incoming Notifications Integration	UPDATED Expanded the Context section and step 4 to include details on using the integration to receive Automatic Enrolment Payroll Notification from NAERSA.

Concept: Irish Incoming Notifications Integration	UPDATED Expanded the Context and Integration Files sections to include details on using the integration to receive notifications from NAERSA.
Steps: Set Up Irish Payroll Submission Integration	UPDATED Expanded the Prerequisites and Context sections and step 4 to include details on using the integration to submit payroll data to NAERSA.
Concept: Irish Payroll Submission Integration	UPDATED Expanded the introductory and Integration Files and Reports sections to include details on using the integration to submit data to NAERSA.

Workday REST API

Concept: Workday REST API Date, Time, and Time Zone Handling	UPDATED Added information about time zones.

Workday Web Services and Integration IDs

Concept: Change Job SOAP Web Service Guidelines and Troubleshooting	UPDATED In the Web Service Processing section, added information about inserting out of order change job events.
Concept: Workday Web Service API Date, Time, and Time Zone Handling	UPDATED Added information about time zones.
Reference: Rich Text Fields in WWS	UPDATED Added information about supported HTML tags.

November 14, 2025

Enterprise Interface Builder (EIB)

Concept: Adjust Time Off EIB	UPDATED In the Common Issues and Errors section, removed the bullets on loading time offs for terminated employees, and large volumes of time off requests.

Concept: Enter Time Off EIB	UPDATED Added recommendations for performant data loads.
Concept: Import Time Off Request Event Batch EIB	UPDATED Added recommendations for performant data loads.
Concept: Submit Engagement Builder EIB	UPDATED Added guidelines for engagement reminders. Updated the sample input file.

Global Payroll Connect

Set Up Global Payroll Processing Checklists	UPDATED Added the needed security to create an external URL.
Steps: Set Up External Payroll Results Inbound Integration	UPDATED In the Next Steps section, added information about the Delete by Batch ID task.

October 31, 2025

Global Payroll Connect

Reference: Staffing Events in Payroll Effective Change Interface Extracts	UPDATED Updated to clarify the possible combination of staffing events in the extract.
Reference: Staffing Events in Worker Effective Change Interface Extracts	UPDATED Updated to clarify the possible combination of staffing events in the extract.

HCM Connectors

Steps: Set Up Notifications for Workday Connector for Equifax Verification	UPDATED Renamed all instances of ML Features Notification to AI Features and Third Party Notification.

Launch and Manage Integrations

Retrieve Technical Files for Integration Events	NEW

	How to retrieve technical files for integration events.

Student Connectors

Reference: PESC Student Transcript Connector File Schema	NEW Information about the PESC Student Transcript Outbound Connector file schema.

Workday Extend

Concept: Extend App Components	UPDATED Removed duplicate links from Related Information section.
Reference: Limits on Presentation Components	UPDATED Updated the editWizard and flow definitions limit to 25.

October 17, 2025

Enterprise Interface Builder (EIB)

Concept: Put Learning Imported Content EIB	UPDATED Put Learning Enrollment

Getting Started with Workday Connectors

Reference: Student Connectors Catalog	UPDATED Removed and replaced the Cashnet references.

Global Payroll Connect

FAQ: Data Changes on Demand	NEW Answers frequently asked questions about Data Changes on Demand.

Orchestration for Integrations

Concept: Integration Events and Integration Process Events	UPDATED Describes the difference between Integration Events and Integration Process Events.

Student Connectors

Steps: Set Up Integration for Student Financials Data	UPDATED Removed and replaced the Cashnet references.
Concept: Student Financials Connectors	UPDATED Removed and replaced the Cashnet references.
Setup Considerations: PESC Compliant Transcript Outbound Connector	NEW New topic about the PESC compliant transcript outbound connector.

Workday Extend

Concept: Orchestration Processes	UPDATED Describes how Workday Orchestrate divides each orchestration into distinct but fundamentally connected processses.
Reference: Orchestration Runtime Limits	UPDATED Updated these limits: • Concurrent data in memory. • Concurrent data on disk. • Business Process orchestrations, total elapsed time. • Workday Integration System orchestrations, total elapsed time. • Individual process timeout.

October 3, 2025

Financials Connectors

Steps: Set Up Integration to Import EDI 810 Supplier Invoices	UPDATED In Step 5, removed the table row for Use Default Supplier Connection.
Reference: Valid Element Codes for Inbound EDI 810 Files	UPDATED Removed information about the 92 code for N103 Identification Code Qualifier for the N1 Remit to Connection segment.

Global Payroll Connect

Concept: PECI and WECI Comparison	NEW Describes the concepts of the differences of the Payroll Effective Change Interface integration and the Worker Effective Change Interface integration.
Configure Payroll Effective Change Interface Integration Attributes and Maps	UPDATED Added to the Reporting For Termination On Last Day of Pay Period integration attribute description.

Workday Extend

Reference: Limits on Model Components	UPDATED Expanded to include a Profile Groups section.

September 19, 2025

Enterprise Interface Builder (EIB)

Launch EIB Spreadsheet Upload	UPDATED
Concept: EIB Spreadsheet Data Entry Guidelines	UPDATED Added new section documenting Multi-Instance Custom Objects using Custom Object v2 web service operations.
Concept: Put Candidate EIB	UPDATED Uploaded the new updated spreadsheet under Sample EIB Input File section.

Financials Connectors

Steps: Set Up Integration to Import EDI 810 Supplier Invoices	UPDATED In Step 5, added table rows for: • Include Landed Costs in Tax • Spend Category for Freight and Other Charges • Use Default Supplier Connection
Steps: Set Up Integration to Import EDI 855 Purchase Order Acknowledgments	UPDATED Updated this topic with POA with automatic Item substitution details

Reference: Valid Element Codes for Inbound EDI 810 Files	UPDATED Added a 92 code for N103 Identification Code Qualifier for the N1 Remit to Connection segment.
Steps: Configure cXML Electronic Customer Invoice Template	UPDATED Added information on the Company Tax ID attribute to Step 2.
Steps: Set Up Punchout Purchase Order Integration	UPDATED Added Step 4, to provide information on how to include procurement card details in outbound purchase order cXML files.

Global Payroll Connect

Maintain External Payroll Input Reasons	NEW How to maintain external payroll input reasons.
Manage External Payroll Input for Worker	UPDATED Updated step 2 to include External Payroll Input Reason.
Concept: Additional Payroll Data	UPDATED Added a bullet to clarify that third-party payroll vendors determine whether or not to support attachments on additional payroll data forms.
Concept: Attachments for Additional Payroll Data	NEW Describes the concept of additional payroll data attachments in Workday.
Reference: Data Sections for Data Changes on Demand	UPDATED Added new v2 fields to these data sections: • Payroll Input Earnings and Deductions • Payroll One Time Payment • Compensation One Time Payment • Benefits Earnings and Deductions • Compensation Earnings and Deductions • Compensation One Time Payment • Payroll Input Earnings and Deductions • Payroll One Time Payment
Reference: Data Changes on Demand Request Criteria Parameters	UPDATED

	Updated the descriptions of the request headers and the allEffective parameter.
Setup Considerations: Global Payroll Hub	UPDATED Added to the Business Benefits and Use Cases sections for the Global Payroll Hub attachments and comments enhancement.
Set Up Global Payroll Processing Checklists	UPDATED Added an optional step for configuring the hub so you can add attachments and comments.
Reference: Data Sections for Payroll Effective Change Interface	UPDATED Added fields to these data sections: • Compensation One Time Payment • Benefits Earnings and Deductions • Compensation Earnings and Deductions • Compensation One Time Payments • Payroll Input Earnings and Deductions • Payroll One Time Payments • Time Off Earnings and Deductions • Time Tracking Added the Manager Integrated Organization row to the Position Data Section. Added Personnel Action Request Data Section rows for U.S. Federal customers.
Reference: Staffing Events in Payroll Effective Change Interface Extracts	UPDATED Updated to clarify that the integration only reports an HIR-C event code when you enable the the Effective Stack - Expanded Effective Changes service.
Reference: Staffing Events in Worker Effective Change Interface Extracts	UPDATED Updated to clarify that the integration only reports an HIR-C event code when you enable the the Effective Stack - Expanded Effective Changes service.
Setup Considerations: External Payslips REST API	UPDATED Removed the limitation stating that external payslips aren't supported on mobile.
Steps: Set Up External Payslips REST API	UPDATED Added new, optional steps 5 and 6 to describe configuring the Attachment Endpoint attribute and setting up proxy access for administrators.

Steps: Set Up External Tax Documents REST API	UPDATED Added new, optional steps 5 and 6 to describe configuring the Attachment Endpoint attribute and setting up proxy access for administrators.

HCM Connectors

Setup Considerations: E-Verify Integration	UPDATED Added information about Workday retrieving the Integration ID when you make a service call through the E-Verify integration, and about employer agents.
Steps: Set Up E-Verify Integration	UPDATED Added information about Workday retrieving the Integration ID when you make a service call through the E-Verify integration, and employer agents.
Complete Set Up and Upgrade Prerequisites for E-Verify Integration	UPDATED Added information about employer agents.
Concept: E-Verify Integration	UPDATED Added information about employer agent.

Integration Business Processes

Create Integration Business Process	UPDATED Added information about business process security prerequisites.

Integration Services

Launch Integrations Using OAuth 2.0 Bearer Tokens	UPDATED Added information about X-Tenant header.

Orchestration for Integrations

Access Orchestrate for Integrations	NEW Describes how to gain access to Orchestrate for Integrations and the Workday Developer site.

Workday Extend

Concept: Extend App Components	UPDATED • Reorganized Extend App Components Reference section in the left navigation panel to reflect current list of app components in App Builder. • Updated this topic to reflect the list of Extend app components in App Builder.
Reference: Limits on Presentation Components	UPDATED Added the Limits on Card Components section.

Workday Payroll Connectors

Steps: Set Up HM Revenue & Customs RTI Employer Payment Summary Integration	UPDATED Removed reference to the Gateway Test attribute from step 3 as this is no longer visible.
Steps: Set Up HM Revenue & Customs RTI Integration	UPDATED Removed reference to the Gateway Test attribute from step 3 as this is no longer visible.
Steps: Set Up Irish Incoming Notifications Integration	NEW How to set up Irish payroll incoming notification integrations in Workday.
Concept: Irish Incoming Notifications Integration	NEW Describes the concept of Irish incoming notification integrations in Workday.
Steps: Set Up Irish Payroll Submission Integration	NEW How to set up Irish payroll submission integrations in Workday.
Concept: Irish Payroll Submission Integration	NEW Describes the concept of Irish payroll submission integrations in Workday.
Steps: Set Up Irish Revenue Check Payroll Submission Integration	NEW How to set up Irish check payroll submission integrations in Workday.
Concept: Irish Revenue Check Payroll Submission Integration	NEW

	Describes the concept of Irish check payroll submission integrations in Workday.
Concept: Tax Filing Integration Launch Options	UPDATED In the Tax Filing Integration Launch Parameter Notes section, added details about quarterly tax filing integrations.

Workday REST API

Learning REST APIs	NEW Information about Learning REST APIs.
Manage Digital Course REST API	NEW Usage guide for the Manage Digital Course REST API.
Content REST API	NEW Usage guide for the Content REST API.

Workday Web Services and Integration IDs

Concept: Workday Web Services Best Practices	UPDATED Added information about Put, Import, and Bulk Import web services.
Concept: Workday SOAP API Headers	UPDATED Added information about the validate-only header and request timeout header.
Concept: Import Web Service Pattern	UPDATED Added information about business processes for Import web services.

Manage Workday

December 12, 2025

Business Processes

Reference: Actions Available on Business Processes	UPDATED

	In the Approve row, included additional information about the Additional Approvers prompt.
Concept: Approval Step	UPDATED In the Additional Approvers section, included additional information about the Additional Approvers prompt.
Concept: Review Documents Step	UPDATED Updated Configure Review Documents Step to Use E-sign by Adobe Sign section to describe Adobe Sign's document merging functionality and to refer users to Adobe documentation.
View Questionnaire Responses in Approval Steps	UPDATED Clarified security and business process configuration requirements in the Prerequisites section.

Collaboration

Create an Engagement	UPDATED Added reference to the Use Case: Create Engagements topic in the context section.

Organizations

Concept: Inactive Organizations	UPDATED Added nav for finding Inactivate Organization task.

Tenant Configuration

Reference: Edit Tenant Setup - HCM	UPDATED Added information about the Enable Mass Time Requests option in the Time Tracking section.
Reference: Edit Tenant Setup - System	UPDATED Fixed broken links to the Workday Community: Scheduled Maintenance article.
Steps: Set Up Notifications for AI Feature Data Contributions	UPDATED How to set up notifications for AI feature data contributions.
Enable Innovation Services Feature and AI Data Contributions for MSA Customers	UPDATED

	Updated Next Steps section to synchronize testing information with the Concept: Workday AI for Universal Main Subscription Agreement Customers topic.
Manage Workday AI Data Contributions for Universal Main Subscription Agreement Customers	UPDATED How to manage Workday AI data contributions for UMSA customers.
Concept: Workday AI for Universal Main Subscription Agreement Customers	UPDATED Clarified AI activation process for UMSA customers. Provided additional information on tasks listed in the Testing AI Features section.
Reference: Workday AI Data Contributions	UPDATED Updated topic name.
FAQ: Transitioning from Innovation Services Addendum (ISA) to the Universal Main Subscription Agreement (UMSA)	UPDATED Answers frequently asked questions about transitioning from ISA to UMSA.
Set Up Mail Servers for Email Notifications	UPDATED In Step 3, added: • New rows for Delivery Name and Reply To fields. • Additional guidance for the From Display Name field.
Setup Considerations: Workday Messaging	UPDATED In the Security section, added the new Messaging Opt-In/ Opt-Out domain.
Steps: Manage SMS Opt-In Preferences for Groups of Users	NEW How to configure the SMS opt-in mass action on a report and use it to initiate the opt-in/opt-out process for a group of users.
Concept: Step-Based Calculation	UPDATED Added information about the Power operation.
Concept: Implementation Tool Personas	NEW Describes the process of building an implementation user persona, including assessing their responsibilities, deployment scope, and additional permissions.
Reference: Tenant Security Requirements By Persona	NEW

	Information on the required security for implementation tool users, organized by their responsibilities, roles, and the scope of their deployment needs.

User Experience

Setup Considerations: Journeys	UPDATED
Create a Journey in the Journeys Workspace	UPDATED Updated step 4 to include limits on how many step groups per journey and how many steps for step group.
Reference: Sample QuickTips for the Change Job Business Process	UPDATED Added information about Pay Rate Type field.

November 28, 2025

Collaboration

Setup Considerations: Engagement Builder	UPDATED Added nonrequired learning assignments to the Use Case section. Added 2 new entries to the Questions to Consider section. Removed the Limitations section.
Steps: Create Engagement Categories	UPDATED How to create engagement categories.
Create an Engagement	UPDATED Updated the Prerequisites section and step 3 with information on using custom reports as an audience source. Added information on required learning and using the engagement end date as the learning due date to step 5.
Create Engagement Message Templates	UPDATED Changed topic name to better reflect content.
Concept: Custom Reports as Audience Source	UPDATED Describes the concept using custom reports as an audience source in Workday.
Concept: Manage an Engagement	UPDATED Clarified the process of suspending an engagement.

Tenant Configuration

Concept: Amazon SES Email Delivery	UPDATED In the Customer Mail Server Configuration section, added email domains and subdomains for WD104.
Configure Security for Configuration Change Tracker	UPDATED Updated: • Topic Title to remove Reports distinction. The topic now covers security configuration for creating and editing Advanced Configuration packages. • Instructions to now include assigning domains (inlcudimg new domains) to users who only need self auditing and packaging permissions in Configuration Change Tracker.

November 14, 2025

Collaboration

Concept: Defining Audiences	UPDATED Added guidance on using Talent Pools to create an audience.

Roles

Roles and Time Zones	UPDATED Describes setting up time zones and roles.

Tenant Configuration

Concept: Form Completion Assistant	UPDATED Describes the concept of managing Form Completion Assistant.
Reference: Workday AI Data Contributions	UPDATED Updated Expense Protect to Expenses Data in the Financials: Financial Management Machine Learning GA Features section.
Configure Quick Actions Section	NEW How to configure quick actions section in Hubs.

Steps: Set Up Profile Cards	UPDATED Added the Results and Next Steps section to the topic.
Steps: Set Up Custom Objects	UPDATED Updated Context section to indicate that all customers can create custom objects with up to 200 active custom fields.
Create Multicriteria Advanced Lookup Table	NEW How to create a multicriteria advanced lookup table.
Create Lookup Calculations for Multicriteria Advanced Lookup Tables	NEW How to create lookup calculations for multicriteria advanced lookup tables.
Example: Multicriteria Advanced Lookup Table Customized Allowances for Payroll	NEW Illustrates how to create a multicriteria advanced lookup table.
Migrate Packages with Object Transporter	UPDATED Updated the step on selecting an effective date strategy to include: • Clarification on source and target tenant effective dates. • The workflow for selecting granular effective dates at the implementation type and individual instance levels.
Migrate Single Instances with Object Transporter	UPDATED Updated the step on selecting an effective date strategy to include: • Clarification on source and target tenant effective dates. • The workflow for selecting granular effective dates for dependencies of an instance.
Migrate Configuration Catalog Content with Object Transporter	UPDATED Updated the step on selecting an effective date strategy to include: • Clarification on source and target tenant effective dates. • The workflow for selecting granular effective dates at the implementation type and individual instance levels.
Migrate Configuration Changes with Configuration Change Tracker	UPDATED

	Updated: • The Prequisites section to include a link to a topic on how to configure security for Configuration Change Tracker. • The second step with possible main actions that users can complete with Change Tracker depending on permissions and access granted. Updated the step on selecting an effective date strategy to include: • Clarification on source and target tenant effective dates. • The workflow for selecting granular effective dates for dependencies of an instance.
Migrate Configuration Extracts	UPDATED Updated the step on selecting an effective date strategy to include: • Clarification on source and target tenant effective dates. • The workflow for selecting granular effective dates for dependencies of an instance.

User Experience

Steps: Set Up Journeys	UPDATED • In Step 1, updated link name. • Added a Related Information link to the Workday AI Fact Sheet. •
Concept: Journeys Workspace	UPDATED Added a note in the Journey Step Groups section.

October 31, 2025

Business Processes

Embed Related Worklets in Business Processes	UPDATED Expanded the Context section to provide more information and updated the table for all drilldown component popups and embedded BI popups.
Maintain Line Level Routing	UPDATED

	Added information about routing modifiers and custom notifications.
Create Custom Notifications	UPDATED In the Triggers row, added information about routing modifiers and custom notifications.
Concept: Custom Notifications	UPDATED Added information about routing modifiers and custom notifications.

Tenant Configuration

Reference: Edit Tenant Setup - Recruiting	UPDATED Documented the new Social Sign In fields.
Reference: Workday AI Data Contributions	UPDATED Added the Accounts Receivable Data category to the Financials: Financial Management Machine Learning GA Features section. Updated the Expense Protect data category to Expenses Data for accuracy.
Add Home and Dashboard Announcements	UPDATED Clarified Note about image transparency recommendations.
Create and Publish Document Layouts in Docs for Layouts	UPDATED Added information about changing the report data source for an existing document layout.
Concept: Managing Document Layouts in Docs for Layouts	UPDATED Added information about changing the report data source for an existing document layout and deactivating a document layout.
Concept: Viewing Document Layout Details in Docs for Layouts	UPDATED Added information about changing the report data source for an existing document layout.
Concept: Language Instances for Translated Document Layouts	UPDATED Added information about deleting language instances from a document layout.

User Experience

Concept: Journeys	UPDATED Added a new Journeys in Global Search section.
Steps: Configure QuickTips using Guidance Workspace	UPDATED Added information about delete a project and all its quicktips Prerequisites: • security domains • Security Activation domain • Set Up: Guidance Workspace domain
Delete Guidance Project and All its Quick Tips	UPDATED How to delete Guidance Projects and All its Quick Tips.

October 17, 2025

Business Processes

Concept: Offer Business Process Guidelines	UPDATED Provides conceptual guidelines for the Offer business process.

Collaboration

Create an Audience	UPDATED Clarified prerequisites.
Set Up Security for Engagement Builder	UPDATED Clarified the step order.

Tenant Configuration

Setup Considerations: Adoption Planning Hub	UPDATED Updated Recommendations section to reflect a recent fix.
Reference: Form Completion Assistant	UPDATED In the Payroll section, added categories for costing allocations and payroll accounting adjustments.

	In the Student section, changed the category for the Add Test Result row to Admissions.
Reference: Migration Implementation Tools	NEW Provides guidance on which implementation tool to use for common migration scenarios.
Concept: Configuration Change Tracker	UPDATED • Updated section on accessing Configuration Change Tracker with new domains and user access requirements. • Added section on configuration package filtering.
Migrate Configuration Changes with Configuration Change Tracker	UPDATED Updated to include a step on selecting only new or modified instances for a configuration package.

User Experience

Steps: Enable Quick Actions on Workday Home	UPDATED Clarified the action item in the Next Steps section.
Concept: People Experience	UPDATED Workday Home: • Added Quick Actions and Extend Cards in the Workday Home section. • Removed Quick Tasks and View All Apps from the topic.
Concept: Home Page Workspace	UPDATED • Added a new grid under the Work Tools section that displays Extend Cards, Onboarding, and Important Dates. • Removed Enable Onboarding and Important Dates from the Home Page Settings section.
Reference: Home Page Sections	UPDATED Removed View All Apps from the grid.
FAQ: Workday Home	UPDATED Added more information on How can I configure where the sections are on the home page?

October 3, 2025

Business Processes

Concept: Business Process Guidelines	UPDATED Provides information about the concept topics.
Concept: Expense Report Event Business Process Guidelines	NEW Provides guidelines for the Expense Report Event business process.
Concept: Hire Business Process Guidelines	NEW Provides conceptual guidelines for the Hire Event BP.
Concept: Integration Business Process Guidelines	NEW Provides guidelines for the Expense Report Event business process.
Concept: Onboarding Business Process Guidelines	UPDATED Provides guidelines about the Onboarding Business Process.

Collaboration

Setup Considerations: Engagement Builder	UPDATED Added additional information to the Questions to Consider section.
Create an Engagement	UPDATED Added additional information on setting due dates for engagement items.

Organizations

Steps: Set Up Manager Integrated Organizations	NEW Added information on how to set up Manager Integrated Organizations.

Tenant Configuration

Reference: Edit Tenant Setup - HCM	UPDATED

	Added examples and more information on the Enable Time Off and Leave Label for Absence Events check box in the Time Off section.
Steps: Set Up Adoption Planning Hub	UPDATED Added guidance for custom configurations in the Context section.
Create Adoption Items from What's New in Workday Report	UPDATED Clarified adoption item statuses in Step 6.
Create Adoption Items in Adoption Planning Hub	UPDATED Clarified adoption item statuses in Step 2.
Concept: Adoption Planning Hub Customization	UPDATED How to customize the Adoption Planning Hub.
Concept: Feature Adoption	UPDATED Added a note to the Priorities and Statuses section on archived adoption items.
Enable Innovation Services Feature and AI Data Contributions for MSA Customers	UPDATED Added list of tasks that you can use to test your configuration in your Implementation tenant.
Concept: Workday AI for Universal Main Subscription Agreement Customers	UPDATED Added list of tasks that you can use to test your configuration in your Implementation tenant.
Steps: Set Up Profiles and Profile Groups	UPDATED Expanded to mention profile groups created in Workday Extend.
Create Customer Central User Accounts	UPDATED Clarified the description for the check box, Is this user a Workday certified implementer?

User Experience

Concept: Custom Search Topics	UPDATED Title has been changed to Concept: Custom Search Topics.
Create a Journey in the Journeys Workspace	UPDATED

	Removed TIFF as an image file type from Step 8.

September 19, 2025

Business Processes

Setup Considerations: Delegation	UPDATED Added a recommendation and limitation and added information about the delegation web services in these sections: • Questions to Consider • Recommendations • Limitations • Tenant Setup • Reports • Integrations
Concept: Business Process Task Delegation	UPDATED Added information about the delegation web services.
Enable Business Process Task Delegations	UPDATED In step 2, added information about the delegation web service in the Apply Routing Restrictions During Delegation row.

Collaboration

Create an Audience	UPDATED Added additional information on defining audiences with data source filters and related business objects.
Create Engagement Message Templates	UPDATED Changed topic name to better reflect content. Added information on the new Translations prompt enabled by Message Builder.
Concept: Defining Audiences	UPDATED Describes the concept of defining an audience in Workday.
Concept: Manage an Engagement	UPDATED Added information on duplicating an engagement. Also reformatted content into a table for improved scannability.

Tenant Configuration

Reference: Edit Tenant Setup - Business Processes	UPDATED In the Apply Routing Restrictions During Delegation row, added information about the delegation web service.
Reference: Edit Tenant Setup - Financials	UPDATED Added the: • Enable Optimized Search by Project Assignable Role and Worker option to Projects. • Enable IBAN Validation for Payment Elections and Settlement Bank Accounts option to Settlement and Bank Account Options. • Include Commitment Spend and Include Obligation Spend check boxes to Funding Source Options.
Reference: Edit Tenant Setup - HCM	UPDATED Added: • Options for the Remove Prior Compensation for Rehires feature and the Enable Total Rewards Data Visualization Card in the Benefits and Pay Hub setting in the Compensation section. • A new Generative AI section and added information about the Workday Writing Prompts. • The Enable Time Off and Leave Label for Absence Events check box in the Time Off section.
Reference: Edit Tenant Setup - Help	UPDATED Updated the Email Case Creation row with information about manually assigning a case owner.
Reference: Edit Tenant Setup - Payroll	UPDATED In the Payroll Accounting section, added a row for Salary Over the Cap - Evaluate 0% FTE as 100%.
Reference: Time Tracking and Scheduling Features in Workday Mobile	UPDATED For the Flexible Check-In and Check-Out feature, added a • Bullet to the list of actions employees can perform with the mobile app. • Row to the table of features.
Setup Considerations: Adoption Planning Hub	UPDATED Information to consider before setting up the Adoption Planning Hub.

Steps: Set Up Adoption Planning Hub	UPDATED How to set up the Adoption Planning Hub.
Add Custom Reports to Adoption Planning Hub	UPDATED How to add a custom report to the Adoption Planning Hub.
Create Adoption Items from What's New in Workday Report	UPDATED How to create an adoption item from the What's New in Workday report.
Create Adoption Items in Adoption Planning Hub	UPDATED How to create an adoption item in the Adoption Planning Hub.
Concept: Adoption Recommendations	UPDATED Describes the concept of Adoption Recommendations.
Example: Create Roadmap Adoption Item for Multiple Features	UPDATED Illustrates how to create a single adoption item for your roadmap from multiple features on the What's New in Workday report.
Setup Considerations: Adoption Planning	UPDATED Added a note about upcoming retirement.
Steps: Set Up Adoption Security and Dashboards	UPDATED Added a note about upcoming retirement.
Create Adoption Items	UPDATED Added a note about upcoming retirement.
Concept: Feature Adoption	UPDATED Added a note about upcoming retirement.
Concept: Adoption Planning Dashboard	UPDATED Added a note about upcoming retirement.
Concept: End User Adoption Dashboard	UPDATED Added a note about upcoming retirement.
Example: Create Roadmap Adoption Item	UPDATED

	Added a note about upcoming retirement.
Example: Create Backlog Adoption Items	UPDATED Added a note about upcoming retirement.
Enable Innovation Services Feature and AI Data Contributions for MSA Customers	UPDATED • Renamed topic. • Added additional information clarifying that Innovation Services is for Main Service Agreement (MSA) customers.
Reference: Form Completion Assistant	UPDATED Added the Payroll for Canada section. Added the Payroll for USA section.
Concept: Notifications	UPDATED In the Notifications Page section, added information about sending conversational notifications to My Conversations.
Concept: Email Deliverability	UPDATED In the Amazon Simple Email Service Suppression List section, updated the time it takes to remove a valid email address from the suppression list to a few days.
Steps: Set Up My Conversations Security	NEW How to set up security for My Conversations.
Concept: My Conversations	NEW Describes the concept of My Conversations in Workday.
Set Up Considerations: Custom ConnectRs	NEW Set Up Custom ConnectR
Configure Extend Cards in Hubs	NEW How to configure extend cards in Hubs.
Set Up Hubs	UPDATED Updated the option name in step 2.
Customize Hub Navigation	NEW How to customize hubs by adding standards reports and workday-delivered dashboards

Concept: Extend Cards in Hubs	NEW Describes the concept of extend cards in Hubs.
Reference: Core Navigation	UPDATED Added My Conversations as a new application header icon.
Reference: Core Navigation	UPDATED Updated the description for the Menu to reflect the global navigation pinned sidebar.
Reference: Core Navigation	UPDATED Updated the description for the Menu to reflect changes in the Configure Global Navigation Menu, providing an enhanced experience.
Override Currency Decimal Precision	UPDATED Removed incorrect example from Context and updated currency list to match UI.
Setup Considerations: Time Zones	UPDATED Added information about using PST for the effective moment in custom reports.
Reference: Business Processes That Support Docs for Business Processes	UPDATED Added Workday Docs support for the Start Performance Improvement Plan Business Process.
Reference: Business Processes That Support Docs for Business Processes	UPDATED Added the Onboarding and Absence business processes that support Workday Docs.
Steps: Set Up Tenant Branding	UPDATED Content updated to include updates to Profile and Primary Button Styling.
Concept: Custom Objects in Integrations	UPDATED Removed information about Solutions sharing.
Concept: Object Transporter	UPDATED • Added use case for migrating from Configuration Change Tracker. • In the Enabling and Restricting Migration section, updated the table with 2 rows to include new tasks and

	• actions to enable on the Maintain Access to Customer Central Tooling task. • Added Migrating Configuration Changes section about migrations from Configuration Change Tracker reports.
Concept: Configuration Change Tracker	UPDATED Added section about migrating configuration changes from Configuration Change Tracker reports.
Migrate Configuration Changes with Configuration Change Tracker	NEW How to migrate configuraton changes from a Configuration Change Tracker report.

User Experience

Steps: Set Up Workday Home	UPDATED • Added information about Work Tools in Step 4. • Added information about Extend cards in Step 4. • Removed Quick Tasks from Step 5 (D).
Steps: Enable Quick Actions on Workday Home	NEW • Added information about Quick Actions. • Removed information about Quick Tasks from the topic.
Concept: Home Page Workspace	UPDATED Added: • A section on Work Tools. • Added a section on Extend cards.
Concept: Custom Search Topics	NEW Created Concept: Custom Search Topics Set Up and Opt-in topic.
Reference: Home Page Sections	UPDATED • Added a row on Quick Actions. • Removed Quick Tasks.
FAQ: Workday Home	UPDATED • Removed a section on Quick Tasks. • Added a section on Quick Actions. • Added a section on Global Navigation Sidebar.
Create a Journey in the Journeys Workspace	UPDATED

	Added: • Information on Extend Cards as a Step Type. • New row on extend cards in Step 5. • Added information on Journeys distribution through REST APIs on Step 14 • Added information on Journeys distribution through Self Service.
Concept: Journeys	UPDATED Added: • Information in the Segmented Security on a Journey Category section. • Extend Cards.
Concept: Journeys Workspace	UPDATED Added: • Information about extend cards as a step type in the journeys editor. • A new row in the Step Types section describing the extend cards. • Information about journey category and journey fields auto-populating information in the Journey Detail section.
Concept: Guidance Workspace	UPDATED Removed note.

Payroll

December 12, 2025

Labor Costing

Steps: Set Up Labor Costing	UPDATED Changed references of the Edit Tenant Setup - Payroll task to the Maintain Payroll Accounting Options task.
Example: Using Costing Company Override Rules	UPDATED Changed references of the Edit Tenant Setup - Payroll task to the Maintain Payroll Accounting Options task.
Concept: Allocation of Payroll Costs	UPDATED

	Changed references of the Edit Tenant Setup - Payroll task to the Maintain Payroll Accounting Options task.

Pay Anomalies

FAQ: Pay Anomalies	UPDATED Added an FAQ on excluding specific pay groups or companies and clarified information on testing Pay Anomalies feature.

Payroll Commitments

Setup Considerations: Payroll Commitment Accounting (CAN, USA)	UPDATED Changed references of the Edit Tenant Setup - Payroll task to the Maintain Payroll Accounting Options task.
Create Initial Payroll Commitments (CAN, USA)	UPDATED Changed references of the Edit Tenant Setup - Payroll task to the Maintain Payroll Accounting Options task.
Steps: Create Forward Accruals for Fringe Benefit Expense (CAN, USA)	UPDATED Changed references of the Edit Tenant Setup - Payroll task to the Maintain Payroll Accounting Options task.

Payroll Processing

Process Payroll Notifications (IRL)	UPDATED Updated the title, Context and Result sections, and Steps 2 and 3, to include information on processing payroll notifications to receive data on MyFutureFund auto-enrolment pensions contributions.
Process Payroll Submissions (IRL)	UPDATED Updated the title, and updated the Context and Result sections and Steps 2 and 3 with information on submitting MyFutureFund auto-enrolment pensions details to the National Automatic Enrolment Retirement Savings Authority.

Payroll and Accounting Results

Setup Considerations: Payroll Register	UPDATED Updated the Payroll Register section to note that you can set up payroll register for Payroll for Ireland.

Payroll for Australia

Create a Submit Pay Event (AUS)	UPDATED Clarified information about viewing errors.
Create an Update Pay Event (AUS)	UPDATED Added information about finalizing workers.
Approve an STP Pay Event (AUS)	UPDATED Added a new step for the Blocking Errors page.
Cancel an Approved STP Report (AUS)	UPDATED How to cancel an approved STP report.
Steps: Set Up Taxes (AUS)	UPDATED Added a new prerequisite: requirement to have ABN recorded.

Payroll for Ireland

Setup Considerations: MyFutureFund Auto-Enrolment Pensions (IRL)	NEW Information to consider before setting up MyFutureFund Auto-Enrolment Pensions.
Process AEPN Data (IRL)	NEW How to process AEPN data for MyFutureFund Auto-Enrolment Pensions.
Add AEPN Details for Workers (IRL)	NEW How to add AEPN details for workers.

Payroll for the U.S.

Setup Considerations: Salary Over the Cap (USA)	UPDATED Changed references of the Edit Tenant Setup - Payroll task to the Maintain Payroll Accounting Options task. Added security setup for Maintain Payroll Accounting Options.

Retroactive Payroll

Process Retro Differences in On-Demand Payments	UPDATED

	In Step 5, the override options have been updated to clearly indicate which tax authority and company overrides are supported in each country.

November 14, 2025

Payroll for Ireland

Set Up Earnings, Hours and Employment Cost Survey for CSO Reporting (IRL)	UPDATED Added a new step 1 to provide information on setting up an integration to generate Earnings, Hours and Employment Costs Survey data in XML format.
Reference: XML Schema Elements for Earnings, Hours and Employment Cost Survey (IRL)	NEW Provides additional information about reporting Earnings, Hours and Employment Costs Survey data to the Central Statistics Office.

Payroll for the U.S.

Schedule FLSA Work Period Calendar Update	UPDATED In the Next Steps section, provided clarifying information on how to manage the scheduled FLSA work period calendar updates.
Example: Define a 401(k) Pre-Tax Deduction (USA)	UPDATED Added a note to clarify this is a basic 401(k) deduction example.
Example: Define a 401(k) Roth Post-Tax Deduction (USA)	UPDATED Clarified that this is a basic 401(k) example and that Workday recommends you take into account recent amendments to the tax code, specifically the Secure 2.0 Act.
Example: Create a 401(k) Catch-Up Deduction (USA)	UPDATED Clarified that this is a basic 401(k) example and that Workday recommends you take into account recent amendments to the tax code, specifically the Secure 2.0 Act.
Concept: Payroll for U.S. Territories (USA)	UPDATED Added that employees can also add any additional deduction amount or percentage on the self-service Withholding Elections task and a note about when a worker claims the Entrepreneur Exemption.

Concept: Rounding Recovery for Ongoing Multiple Work Jurisdictions	NEW Explains the concept of rounding recovery for ongoing multiple work jurisdictions.

Payroll for the UK

FAQ: Court Orders (UK)	UPDATED Added a question about ensuring deductions aren't taken for completed orders.

Retroactive Payroll

Steps: Set Up Retro Processing	UPDATED Added a note to step 2 with a recommended configuration for pay balances to ensure correct related calculations.
Concept: Retro and Pay Balances	UPDATED Added a note to the Retro Calculation Examples section with a recommended configuration for pay balances to ensure correct related calculations.

October 31, 2025

Payroll and Accounting Results

Troubleshooting: Payroll Accounting and Commitment Journals with Errors	UPDATED Added a note about how to handle errors in operational summary journals.

Payroll for the U.S.

Create 401(k) Loan Repayment Deduction (USA)	UPDATED Added the payroll input instructions for 401k deductions to ensure the total outstanding loan balance is entered in the '401k Loan Balance' field, not the 'Original Amount' field.

October 17, 2025

Net Pay Validation and Arrears

Concept: Arrears Processing	UPDATED In the Subsequent calculations when initial net pay is above the minimum section, added that Workday recoups arrears based on the payment date.

Payroll for Ireland

Set Up Earnings, Hours and Employment Cost Survey for CSO Reporting (IRL)	NEW How to set up the Earnings, Hours and Employment Cost Survey for reporting to the Central Statistics Office.

Set Up Payroll Processing

Concept: Pay Modeling	UPDATED Added "You can model pay for active workers only" in limitation section.

October 3, 2025

Set Up Payroll Processing

Set Up Payroll and Time Tracking Period Schedules	UPDATED Added note that periods that have commitment results can't be deleted.

September 19, 2025

Compliance

Concept: Statutory Compliance (IRL)	NEW Describes the available features for Payroll for Ireland, and how they comply with legislation.

Earnings, Deductions, and Other Calculations

Setup Considerations: Earning and Deduction Limits	UPDATED

	Updated the Create Earnings and Deductions section to include details relevant to Payroll for Ireland.
Steps: Create Earnings	UPDATED Updated step 12 to include details of the pay component group used in Payroll for the UK when calculating the UK 50% regulatory income tax limit.
Steps: Create Earnings	NEW Updated the Create Earnings and Deductions section to include details relevant to Payroll for Ireland.
Reference: Payroll Configuration Reports	UPDATED Added information about sample check text instructions to the description of the Sample Check Images report.
Setup Considerations: Payroll Proration	UPDATED Added Change in collective agreement (AUS) as a use case example.
Setup Considerations: Payroll Proration	UPDATED Updated the Proration section to include details relevant to Payroll for Ireland.
Reference: Midperiod Changes Causing Proration	UPDATED Added Change in Collective Agreement to Australia table.
Setup Considerations: Gross-Up Calculations	UPDATED Updated the Gross Up Wages and Taxes section to include details relevant to Payroll for Ireland.

International Assignment Pay

Steps: Set Up International Assignment Pay (CAN, UK, USA)	UPDATED Updated to add context and step 6 for a new UK-specific task.
Add International Assignment Details (UK)	NEW How to add additional details for a worker assigned to the UK.

Labor Costing

Steps: Set Up Approval Routing for Costing	UPDATED Added an optional step 3 to explain how to add a questionnaire to the Assign Costing Allocation business process.
Define Cost Allocations for a Worker	UPDATED Added a note to the Context section about rescinding assigned costing allocations.
Define Cost Allocations for Position Restrictions	UPDATED Added a note to the Context section about rescinding assigned costing allocations.
Set Up Retro Costing for Payroll Accounting	UPDATED Removed step 4, step, 5, and the Retro Costing to Salary Cap Grant example. This information is now in the topic Set Up Payroll Accounting Options for Salary Over the Cap.
Concept: Allocation of Payroll Costs	UPDATED Added new Rescinding an Assigned Costing Allocation section.
Concept: Allocate Net Pay Liability Based on Earning Proration	UPDATED In the Actuals Journals section, added Adds to Gross and Net Pay Only proration functionality.
Concept: Current Accounting	UPDATED Details the Current Accounting functionality for pay results.
Concept: Costing Allocation Sources for Journal Lines	UPDATED Details the functionality for viewing costing allocation sources associated with payroll journal lines.

Net Pay Validation and Arrears

Setup Considerations: Net Pay Validation and Arrears	UPDATED Updated arrear limits information and limitations around the Shared Recoup Arrears Limit.

Payroll Input

Setup Considerations: Payroll Input	UPDATED Updated the Payroll Input section to include details relevant to Payroll for Ireland.

Payroll Processing

Setup Considerations: On-Cycle Payroll Processing	UPDATED Updated the Process Payroll section to include details relevant to Payroll for Ireland.
Steps: Process Payroll	UPDATED Added steps 3 and 16 for Payroll for Ireland.
Process Payroll Notifications (IRL)	NEW How to retrieve and apply worker's information from Revenue.
Process Payroll Submissions (IRL)	NEW How to send your payroll information to Revenue.
Setup Considerations: Payroll Reversals	UPDATED Clarified that Payroll for Ireland doesn't support reversals.
Checklist: UK Payroll Processing	NEW Checklist to help you prepare for, and review, your UK payroll process.
Setup Considerations: On-Demand Payments	UPDATED Updated the Process On-Demand (Off-Cycle) Payments by Worker section to include details relevant to Payroll for Ireland.
Create On-Demand Additional Payments	UPDATED Added Australia to information about trailing payments.
Override Worktags for On-Demand Payments	UPDATED Added Australia to the information for trailing payments.
Concept: Off-Cycle Payments	UPDATED

	On the Taxes and Other Automatically Calculated Payments table for Payroll for the UK, clarified that Workday automatically calculates one-time payments from Workday Compensation for on-demand additional payments.
FAQ: Off-Cycle Payments	UPDATED Added Australia to the Trailing Payments question.
Setup Considerations: Manual Payments	UPDATED Updated the Process Manual (Off-Cycle) Payments by Worker section to include details relevant to Payroll for Ireland.
Steps: Upload Off-Cycle Payments Using EIB	UPDATED Updated the Process Off-Cycle Payments in Batch Mode section to include details relevant to Payroll for Ireland.
Adjust Payment Priorities for Off-Cycle Payments	UPDATED Updated the Process Manual (Off-Cycle) Payments by Worker section to include details relevant to Payroll for Ireland.
Setup Considerations: Adjustments for Prior Periods	UPDATED Updated the Adjust Payments section to include details relevant to Payroll for Ireland.
Troubleshooting: Payroll Tax Calculations (USA)	UPDATED Added a section for when Workday calculated negative taxable wages for the current pay result but didn't calculate the tax amount associated with it.

Payroll Third-Party Payments

Concept: Payroll Third-Party Payments	UPDATED Updated the Payroll Third-Party Payments to include agency fees for Canada and U.S. withholding orders, added a paragraph to Deduction Recipient Snapshot and updated Settlements section.

Payroll and Accounting Results

Reference: Payroll Audit Reports	UPDATED Added the Payroll Totals by Category report.

Steps: Configure Payroll Access for Non-Payroll Users	UPDATED Demonstrates how to configure access to payroll data for non-payroll users.
Example: Configure Access to Payroll Journal Lines for a Cost Center Accountant	UPDATED Demonstrates one way to configure access to payroll data for non-payroll users.

Payroll for Australia

Example: Set Up Overtime Earnings for Workers on a Collective Agreement (AUS)	UPDATED How to set up overtime earnings for workers on a collective agreement.
Set Up Superannuation Suspension based on Worker Age and Hours Worked (AUS)	UPDATED How to set up superannuation suspension for workers based on their age and hours worked.
Add Worker Superannuation Choice (AUS)	UPDATED Clarification to the date that is used to determine which superannuation fund is used.
Create Termination Payments (AUS)	UPDATED Clarified handling ETP Type R payments.
Set Up Worker Taxes (AUS)	UPDATED Added step 5, details about the ATO Issued PAYG Withholding Variation Details grid.
Concept: ATO Issued PAYG Variation (AUS)	UPDATED Information about ATO Issued PAYG Variations for Australia.
Concept: TFN Exemptions (AUS)	UPDATED Information about TFN exemptions.

Payroll for Canada

Define Tax Authority Exceptions from Pay Component Groups (CAN)	UPDATED In Step 3, added information about effective dating tax authority exceptions from pay component groups.

Setup Considerations: Statutory Holiday Pay (CAN)	UPDATED Removed limitations for stat holiday retro pay and added it as a use case.
Concept: Statutory Holiday Look-Back Periods (CAN)	UPDATED Removed references that say Workday doesn't support recalculating Statutory Holiday pay during retro.

Payroll for France

Define Work Accident and Mobility Payment Contribution Rates (FRA)	UPDATED Added Regional Rate to step 4.
Create a Time Off for Therapeutic Part Time (FRA)	UPDATED In Step 2, renamed Steps: Create a Time Off topic title to its new name, Steps: Set Up Time Offs.

Payroll for Ireland

Payroll for Ireland	NEW Directs users to Irish-specific topics.
Steps: Set Up Payroll Taxes (IRL)	NEW How to set up payroll taxes for Payroll for Ireland.
Set Up Employer Registration Number (IRL)	NEW How to set up an employer registration number.
Set Up Worker Taxes (IRL)	NEW How to set up worker taxes for Payroll for Ireland.
Assign Employment Identifier for Worker (IRL)	NEW How to assign an employment identifier to a worker.
Manage Taxes for Transferred Workers (IRL)	NEW How to manage taxes for transferred workers.
Concept: Gender Pay Gap (IRL)	NEW Describes the concept of gender pay gap reporting for Payroll for Ireland.

Troubleshooting: Gender Pay Gap Earnings Don't Appear in Correct Report (IRL)	NEW How to diagnose and resolve gender pay reporting issues for Payroll for Ireland.

Payroll for the U.S.

Setup Considerations: Payroll Processing for the Fair Labor Standards Act (FLSA)	UPDATED In the Recommendations and Limitations sections, added information about scheduling updates for FLSA work period calendars.
Steps: Set Up Payroll for the Fair Labor Standards Act (USA)	UPDATED In the Steps section, added information on how to schedule FLSA work period calendar updates.
Schedule FLSA Work Period Calendar Update	NEW How to set up FLSA work period calendar updates.
Concept: Auto Adjust Taxable Wages Over the Limit	NEW Describes the concept of auto adjust taxable wages over the limit.
Set Up Payroll Accounting Options for Salary Over the Cap (USA)	NEW How to set up payroll accounting options for Salary Over the Cap.
Define Salary Over the Cap Costing Allocations for a Worker (USA)	UPDATED Updated the Prerequisite section to include Set Up Payroll Accounting Options for Salary Over the Cap.
Define Tax Authority Exceptions from Pay Component Groups (USA)	UPDATED In Step 3, added information about effective dating tax authority exceptions from pay component groups.

Payroll for the UK

Concept: Gender Pay Gap (UK)	UPDATED Task and report names updated to reflect the addition of Irish Payroll.
Troubleshooting: Gender Pay Gap Earnings Don't Appear in Correct Report (UK)	UPDATED Report names updated to reflect the addition of Irish Payroll.

Payslips

Setup Considerations: Payslips	UPDATED Updated the Payslips section to include details relevant to Payroll for Ireland.
Define Payslips	UPDATED In the Results section, clarified that custom Earnings and Deductions fields don't transfer to other custom reports.
Steps: Set Up Custom Report Designer Payslips	UPDATED In step 1, clarified that the custom Earnings and Deductions fields used in payslips reports don't transfer to other custom reports.
Steps: Set Up Custom Report Designer Payslips	UPDATED Added Listing Collective Agreement Information for Australia as an option to the Context list.

Retroactive Payroll

Setup Considerations: Retroactive Pay Processing	UPDATED Updated the Process Retroactive Payroll section to include details relevant to Payroll for Ireland.
Setup Considerations: Retroactive Payroll Results	UPDATED Updated the Review Retroactive Payroll Results section to include details relevant to Payroll for Ireland.
Concept: Retro Payroll Input	UPDATED Updated the Supported Retroactive Features section to include details relevant to Payroll for Ireland.

Set Up Payroll Processing

Concept: Pay Modeling	UPDATED
Concept: Intelligent Prompt Recommendations for Payroll	UPDATED Added ROE and Withholding Orders for Payroll for Canada.
Concept: Intelligent Prompt Recommendations for Payroll	UPDATED

	Added information on costing allocations and payroll accounting adjustments using intelligent prompt recommendations. For Payroll for the U.S., added information on creditor garnishment withholding orders using intelligent prompt recommendations.
Concept: Pay for Terminated Workers	UPDATED In the Terminated Workers on Salary Continuance section, clarified that if the pay through date is prior to the termination date, workers are paid up to the termination date.

Reporting and Analytics

December 12, 2025

Custom Reports and Analytics

Reference: Choose a Distribution Method	UPDATED Describes the advantages and disadvantages or limitations of using various report formats in Workday.

Prism Analytics

Reference: Filter Stages	UPDATED Added a note for the basic filter using instance field type.

November 28, 2025

Prism Analytics

Set Up Languages in Prism Analytics	NEW Steps to change language preferences in Prism Analytics.

November 14, 2025

People Analytics

Concept: People Analytics Activities	UPDATED

	We update the Data Refresh section to include a note about when the automated update starts and refreshes the data.

October 17, 2025

Custom Reports and Analytics

Concept: Pagination of WQL Query Results	UPDATED Added 30-minute limit for query cache retention.
Reference: WQL REST API	UPDATED Changed cached query clearance time from 15 to 30 minutes.

Prism Analytics

Concept: Prism Calculated Fields	UPDATED Added the Calculated Field Deletion section to explain deletion of calculated fields in Prism.
Concept: Deleting Prism Data	UPDATED Added a row for deleting a report or a calculated field within a report with existing Prism references.

October 3, 2025

Worksheets

Migrate Live Data Workbooks Between Tenants	UPDATED Added workbook migration support for more user types.
FAQ: Collaboration and Security in Worksheets	UPDATED Added workbook migration support for more user types.

September 19, 2025

Analytics and Reporting Hub

Steps: Set Up Analytics and Reporting Hub	NEW How to set up the Analytics and Reporting Hub.

Custom Reports and Analytics

Set Up Prompt Options for Custom Reports	UPDATED Added information about using PST for the effective moment in custom reports.
Set Up Curated Field Lists for Reporting	NEW How to set up curated field lists for Matrix and Advanced reports.

Discovery Boards

Set Up Curated Field Lists for Discovery Boards	UPDATED We rename this topic from Set Up Curated Field Lists to Set Up Curated Field Lists for Discovery Boards to clarify that this functionality is specific to discovery boards. We also renamed the Maintain Field Lists for Discovery Boards report to Maintain Field Lists for Reporting and added a new step to explain the new Product Area prompt.

People Analytics

Concept: Data Quality Module	UPDATED Removed note about Hiring V2 from this topic.

Prism Analytics

Create a Data Change Task	UPDATED In the SFTP row, added detail about overriding the default directory and file pattern of an SFTP connection.

Spend Management

December 12, 2025

Procurement

Create External Supplier Sites	UPDATED Fixed broken links to the Workday Community: Scheduled Maintenance article.

November 14, 2025

Procurement

Steps: Create Commodity Codes	UPDATED Expanded Result section to include information about commodity codes on change orders, for clarity.

October 31, 2025

Inventory

Set Up Inventory Stocking Locations	UPDATED Added a new check box in Step 3.

Procurement

Manage Web Items	UPDATED Expanded the Context section to include more information about web items and spend categories, for clarity.

October 17, 2025

Procurement

Steps: Integrated Search for Item Management	UPDATED Added Step 6.
Configure Integrated Search with Multistep Approval Routing	NEW How to configure an integrated search with multistep approval routing.

October 3, 2025

Procurement

Create Suppliers	UPDATED Removed information about Accepted Currencies for settlement bank accounts.

Create Supplier Remit-To Connections	UPDATED Removed that we also populate the default currency based on the accepted currencies of the remit-to bank account.

September 19, 2025

Inventory

Set Up Inventory Sites	UPDATED Added information on Restrict Deletion of Item Site Options in Step 2 and Include On-Order Consigned in Step 4.
Set Up Purchase Items for Inventory	UPDATED Added Consignment Options information to Step 6.
Concept: Inventory Accounting	UPDATED Added information on Consolidate Transactions accounting behavior.
Calculate Par Average Daily Usage	UPDATED Added info on what counts as new usage for a par line in the Prerequisites and Context sections.
Concept: Replenish Consigned Items	NEW Describes the concept of replenishing consigned items in Workday.

Procurement

Steps: Set Up Procurement	UPDATED Updated the topic with Business view Data sources for Purchase Item Order Metrics and Business View for Supplier Contract Activity data
Set Up Procurement Reasons	UPDATED Expanded the Context and Result sections to include information on connecting suppliers with reason codes.
Set Up Intelligent Intake	NEW New topic added for Intelligent Intake for procurement.

Concept: Procurement Conditional Rules	UPDATED Updated this topic with POA with automatic item substitution details
Concept: Intelligent Intake	NEW New topic added for Intelligent Intake for procurement.
Create Suppliers	UPDATED Updated this topic with POA with automatic item substitution details
Create Suppliers	UPDATED Added information about Accepted Currencies for settlement bank accounts.
Create Supplier Remit-To Connections	UPDATED Added that we also populate the default currency based on the accepted currencies of the remit-to bank account.
Concept: Supplier Portal	UPDATED Updated the topic with Procedure Information details
Steps: Set Up Purchase Items for Procurement	UPDATED Updated the topic with Business view Data sources for Purchase Item Order Metrics and Business View for Supplier Contract Activity data
Create Requisitions in the Requisitions Worklet	UPDATED Expanded the Next Steps section to include information on questionnaires in the Requisitions worklet.
Steps: Set Up Purchase Orders for Procurement	UPDATED Updated the topic with Procedure Information details
Create Change Orders	UPDATED Updated this topic with POA with automatic Item substitution details
Steps: Create Purchase Order Acknowledgments	UPDATED Updated this topic with POA with automatic Item substitution details.

Steps: Automate Changes from Purchase Order Acknowledgments	UPDATED Updated this topic with POA with automatic Item substitution details
Verify Procurement Card Transactions	UPDATED Updated the Results section regarding residual differences due to currency conversions.
Steps: Create Supplier Invoice Schedules and Installments for Supplier Contracts	UPDATED In Step 2, added a row for Separate Payment.
Concept: Supplier Contract Analytics and Reporting	UPDATED Updated the topic with Business view Data sources for Purchase Item Order Metrics and Business View for Supplier Contract Activity data

Strategic Sourcing

Set Up Dun & Bradstreet in Strategic Sourcing	UPDATED Removed Company Level 1 in the prerequisites.
Create Supplier Form Templates	UPDATED Updated the description of Flag an update for clarity.
Steps: Set Up the Unified Supplier Portal	UPDATED Updated the topic with SSO and Tenant Mapping details.
Create Pipeline Projects	UPDATED updated this topic with approved spend and currency details
Password Reset for Suppliers	UPDATED Replaced Workday Central Login with Are you a supplier - sign in here link.
Account Recovery for Suppliers	UPDATED Replaced Workday Central Login with Are you a supplier - sign in here link.
FAQ: Supplier Sign In and Account Security	UPDATED Replaced Workday Central Login with Are you a supplier - sign in here link.

Student

December 12, 2025

Academic Advising

Steps: Set Up Academic Requirements	UPDATED On Step 9, moved content about evaluating hypothetical academic progress to Steps: Set Up Academic Requirement Evaluations.
Steps: Set Up Academic Requirement Evaluations	NEW How to set up academic requirement evaluations.
Set Up Academic Requirements Evaluation Display Policies	UPDATED Expanded the Context section to clarify what the policy is used for and the behavior when you don't configure a policy. Clarified and expanded Steps 5 and 6. In the Result section, added information about the tasks where the options from the policy display.
Evaluate Academic Requirements	UPDATED Moved prerequisites to Steps: Set Up Academic Requirement Evaluations. Clarified the Context and Result sections. In the Requirements Effective Date row on Step 2, added information about the academic requirements evaluation display policy.

Academic Foundation

Create Programs of Study	UPDATED On Step 4, in the Exclude Students in Program of Study from National Student Clearinghouse Reporting row, added information about excluding students with multiple programs of study.
Reference: Date Controls	UPDATED Added clarity for Time Zones to Student Records Date Controls - Final Grade Publication.

Create Student Eligibility Rules	UPDATED Moved information about prompt recommendations from the Context section to Step 2 and the Academic Unit row on Step 4. Moved step about disabling machine learning recommendations to Concept: Form Completion Assistant.

Campus Engagement

Steps: Set Up Student Notes	UPDATED Clarified information about machine learning prompt recommendations in the Context section. Moved the step about disabling these recommendations to Concept: Form Completion Assistant.

Financial Aid

Reference: Run Student Financial Processes Reports	UPDATED For the Run Student Financials Processes by Period report, added information about machine learning recommendations on the Academic Year prompt.
Edit Cost of Attendance	UPDATED In the Context section, clarified information about prompt recommendations and data entry checks. Removed Steps 3 and 4 about disabling prompt recommendations and data entry checks.
Concept: Viewing Financial Aid Packages	UPDATED In the Total Financial Assistance section, on the Edit/ Simulate row, added information about machine learning prompt recommendations.
Maintain Satisfactory Academic Progress Policies	UPDATED Added information to the Auto Failed if All F's option row to clarify that Workday omits the courses that you exclude from SAP evaluation using the Exclude Smart List option.

Recruiting and Admissions

Steps: Set Up Education Test Results	UPDATED Clarified information about machine learning prompt recommendations in the Context section. Moved information about disabling these recommendations from Steps to Concept: Form Completion Assistant.

Add Education Test Results	UPDATED In the Context section, expanded information about using test results for student eligibility rules. In the Test row on Step 3, moved information about disabling machine learning recommendations to Concept: Form Completion Assistant.

Student Records

Manage Instructor Load	UPDATED Moved information about data entry checks from the Context section and Step 3 to the Load Value row on Step 2.
Reference: Repeat Course Registrations	UPDATED Added information about multiple course repeat configurations to the introduction.
Steps: Set Up Registration Appointments	UPDATED For clarity, added more information about the Student Overflow column on the Maintain Academic Period Registration Appointments task
Concept: Waitlists	UPDATED Added more information about reserved capacity waitlist seats to the introduction.

November 28, 2025

Student Records

Manage Programs of Study for Students	UPDATED Added context under prerequisites and changed task names for Add Program of Study Event and Remove Program of Study Event to Add Program of Study for Student and Remove Program of Study for Student.

November 14, 2025

Academic Foundation

Reference: Date Controls	UPDATED

	In the Financial Aid Date Controls section, added a row for these new date controls: • Cost of Attendance Reaction Evaluation End Date • Merit Packaging Reaction Evaluation End Date • Need Packaging Reaction Evaluation End Date

Financial Aid

Maintain Cost of Attendance Reaction Policies	UPDATED Added information about how to configure cost of attendance reaction evaluation end dates.
Maintain Packaging Reaction Policies	UPDATED Added information about how to configure packaging reaction evaluation end dates.

Student Records

Concept: Reporting Record	UPDATED New section - Automatic Reporting Record Change
Steps: Set Up Course Repeat Policies	UPDATED Step 2 added new option: Include Repeated and Replaced Registrations for Academic Period Statistics
Steps: Set Up Course Repeat Policies	UPDATED Added additional detail to step 2 Repeat Processing where WD selects latest attempt.
Steps: Set Up Student Grading	UPDATED Added Faculty Grade Change Deadline to step 6.
Create Student Grading Schemes	UPDATED Added additional context for adding grading schemes.
Reference: Grade Category Types	UPDATED Added 4x new GCTs
Create Transcript Configuration Rule Sets	UPDATED In Step 2, added information and corrected the task names in these rows for clarity: • Auto-Disable Include Recipient Address for the Administrator Task

	• Enable Educational Institution as the Recipient on the Administration Task • Allow Hold for Final Grades • Allow Hold for Program Completion

October 31, 2025

Academic Advising

Create Academic Requirements	UPDATED In the Prerequisites section, expanded the first bullet to provide more information about eligibility rules for academic requirements. In the Next Steps section, added information about manually evaluating academic progress for students.
Reference: Eligibility Rules for Academic Requirements	UPDATED In the Grade Requirement row, added that the rule can be used to verify earned grades with specified grade category types. Corrected the name of the Test Achievement eligibility rule type.
Evaluate Academic Progress	UPDATED Migrated content from Concept: Launch Academic Progress Evaluation to this topic. Expanded the Context section. Clarified the Steps section for using the Launch Academic Progress Evaluation task. In the Student row on Step 2, added information about the Evaluate All Programs of Study check box. In the Result section, added information about viewing the status of the academic progress evaluation job.
Reference: Academic Progress Evaluation Triggers	UPDATED Clarified information about academic progress evaluation and the Last Evaluated Date.
Example: Create EIB for Student Cohort Memberships	NEW Created new topic.

Recruiting and Admissions

Create Educational Institution Grading Schemes	UPDATED

	In the Context section, added information about Workday-delivered educational institution grading schemes. On Step 1, changed the task from Maintain Educational Institution Grading Schemes to Create Educational Institution Grading Scheme. In the Configuration row on Step 2, clarified how the configuration is used for assigning different transfer grades. In the Next Steps section, added the report where you can view custom educational institution grading schemes.
Create Educational Institutions	UPDATED In the Grading Schemes row on Step 2, added information about Workday-delivered educational institution grading schemes. Removed the Prerequisite about creating custom educational institution grading schemes.

Student Financials

Example: Create EIB for Charge Due Dates	NEW Created new topic.
Example: Create EIB for Course Section Fees	NEW Created new topic.
Example: Create EIB for Student Charges	NEW Created new topic.
Place Students in Collections or Active Bankruptcies	UPDATED Added the Past Due Balance Holds list item in the Exclude from Notifications table row.

Student Records

Steps: Set Up Student Registration	UPDATED Moved: • Step 8 to Step 9, for accuracy. • Information from Step 8 to the Reference: Drop Students from Courses and the new Steps: Mass Drop Invalid Registrations topics.
Create Custom Notifications for Mass Drop Registrations	UPDATED For clarity, added the required business processes to the Prerequisites section.

Steps: Manage Student Registrations	**UPDATED** Added a new Step 7 to include the new Steps: Mass Drop Invalid Registrations topic.
Steps: Mass Drop Invalid Registrations	**UPDATED** How to mass drop students with invalid registrations from courses.
Reference: Drop Students from Courses	**UPDATED** Moved information from the Drop students who no longer meet course prerequisites row to the new Steps: Mass Drop Invalid Registrations topic.
Steps: Set Up Class Standing Policies	**UPDATED** Add alternative for Class Standing details to step 3c and included note with clarity for enabling Eligibility Rules Based Progression.
Set Up Transfer Grade Mapping Policies	**UPDATED** In the Override Grade row on Step 4, clarified that the configurations are used for assigning different transfer grades. In the Education Test row on Step 4, expanded information about transfer grades for education tests. Moved content from the Example section to Concept: Transfer Grades.
Concept: Transfer Grades	**NEW** Describes the concept of transfer grades in Workday.
Reference: Grade Category Types	**UPDATED** Added information about using grade category types on Grade Requirement student eligibility rules.
FAQ: Academic Records	**UPDATED** Edited content for Discontinue Academic Records, new topic added with full content.

October 17, 2025

Financial Aid

Create Student Award Items	UPDATED On Step 3, updated the Lock Disbursements option description.
Reference: Disbursement Eligibility Conditions	UPDATED In the SAP row, added information on disbursement when the SAP evaluation frequency is Financial Aid Award Year and the student's SAP status for the previous year is Probation.
Evaluate Satisfactory Academic Progress	UPDATED Expanded the Context section to provide information on how to evaluate SAP when the SAP status is missing from a student's previous academic period.
Steps: Initiate and Review SAP Appeals	UPDATED Expanded the Result section to provide more information on how Workday changes the SAP evaluation frequency for a student on probation.
Concept: Satisfactory Academic Progress	UPDATED Made these changes: • Expanded the SAP Evaluation section with information on how Workday enables you to evaluate SAP for students on probation and for students who are missing SAP evaluation in one of the previous academic periods that is eligible for evaluation. • Added the new Disbursement Eligibility Conditions for SAP section.

Student Data

Steps: Set Up Student Journeys	UPDATED • In Step 1, updated link name. • Added a Related Information link to the Workday AI Fact Sheet.

October 3, 2025

Academic Advising

Set Up Academic Requirements Effective Dates Policies	UPDATED Expanded the Context section with information about the default dates when an effective policy isn't configured.
Override Academic Requirements Effective Dates	UPDATED Added a bullet in the Prerequisites section about setting up academic requirements effective dates policies.

Financial Aid

Increase PLUS Loan Amounts	UPDATED Expanded and clarified Results section.

Student Data

Concept: Student Match and Merge	UPDATED Based on customer feedback, added a Note to explain a worker must have an active employment status when merging a student prospect with the worker record.

Student Records

Steps: Manage Student Registrations	UPDATED Removed Step 2 for clarity.
Steps: Set Up Registration Appointments	UPDATED For clarity: • Renamed this topic to Steps: Set Up Registration Appointments. • Expanded on the Context section and added a new Step 2 to include information about registration appointment refreshes.

September 19, 2025

Academic Advising

Setup Considerations: Academic Requirements	UPDATED Clarified and expanded the Questions to Consider section. In the Business Process section, added the Override Academic Requirements Effective Dates for Student Event business process. In the Reporting section, added the Academic Progress Troubleshooting Console report. In the Integrations section, added web services for academic requirements effective dates policies and overriding academic requirement effective dates.
Steps: Set Up Academic Requirements	UPDATED Added Step 2 about academic requirements effective dates policies. On Step 4, corrected the eligibility rule types. On Step 9, added a substep for configuring domain security policies for academic requirement evaluation. On Step 10, added the Override Academic Requirements Effective Dates for Student Event business process.
Set Up Academic Progress Processing Policies	UPDATED From Step 4, moved information about the: • Choose a Definition section to Step 2. • Academic Requirements Effective On option to Set Up Academic Requirements Effective Dates Policies. Moved the step about launching academic progress evaluation to the Next Steps section. Clarified the Example section.
Set Up Academic Requirements Effective Dates Policies	NEW How to set up policies for academic requirements effective dates.
Concept: Course Evaluations for Academic Progress	UPDATED In the Course Applicability section, clarified and expanded information to describe the different logic for sharing and nonsharing tenants. In the Consistent Prioritization section, added information about the tiebreaking logic when multiple course registrations

	still have the same priority after all ordering principles are applied.
Reference: Academic Progress Evaluation Triggers	**UPDATED** On the Override Requirements Effective Date row, corrected the business process to Override Academic Requirements Effective Dates for Student Event. Replaced the More Information link to Override Academic Requirements Effective Dates.
Reference: Academic Progress Report	**UPDATED** In the Program of Study Requirements section, • Expanded information about the Requirements Effective field. • Added information about the Requirements Not Assigned field.
Reference: Academic Progress Troubleshooting	**NEW** Provides additional information about the Academic Progress Troubleshooting Console report.
Override Academic Requirements Effective Dates	**UPDATED** Renamed from Override Academic Requirement Effective Date to Override Academic Requirement Effective Dates. Added information about the Override Academic Requirements Effective Dates for Student Event business process: • In the Prerequisites section, replaced the Manage: Academic Requirements Overrides domain security with the business process. • Revised the Result section to describe the business process. Added information about overriding requirements effective dates at different configuration nodes: • Expanded and clarified the Context section. • Updated Step 3 to describe the Override Requirement Effective Dates grid. On Step 1, changed the task name to Override Academic Requirements Effective Dates for Student. Removed the Next Steps section.
Create Academic Plans	**UPDATED** In the Course row on Step 2, added information about course displayed in the prompt categories.

	In the Next Steps section, added information about the Self-Service: Academic Planning domain to enable students to edit and view their academic plans.

Academic Foundation

Create Programs of Study	UPDATED On Step 4, • On the Requires Declaration row, added information about student declaration eligibility rules. • Added the Admission Response Not Required row. • Added the Evaluate Academic Requirements Prior to Program Change row.
Setup Considerations: Academic Calendars	UPDATED In the Academic Periods row in the Questions to Consider section, added: • A question about nonstandard academic periods. • A link to the Concept: Standard and Nonstandard Academic Periods topic.

Campus Engagement

Send Messages from Course Section Rosters	UPDATED Updated the Results section to indicate how users can view messages they've sent.
Create Student Messages	UPDATED Added a note about the Composer Format, in: • The Context section for the Customization consideration, Notification Designer Template. • Step 2 for the Email Format description.
Reference: Workday-Delivered Student Hold Reasons	UPDATED Added a new Disbursement Requires Review hold reason to the table.
Reference: Workday-Delivered Student Hold Types	UPDATED Added a new Nightly Orchestration row with information about that new hold type.

Financial Aid

Concept: Financial Aid Attendance Plans	UPDATED

	Added a new reason for refreshing the attendance plan when backdating the student's expected completion date and switching them to a program of study with a different calendar.
Concept: Actual Enrollment Usage Start Date	UPDATED Added information about setting the Actual Enrollment Usage Start date for an academic period.
Certify Alternative Loan Applications	UPDATED In the description of the Certify Loan option, updated the information for Loan Period Start Date, Loan Period End Date, and Grade Level Code.
Initiate Alternative Loan Application Changes	UPDATED • In the descriptions of Change Disbursements and Cancel Unsent Changes options, added details about immediate changes to the Total Financial Assistance and Disbursement tab. • In the Results section, added details about what happens when you make changes using the Disbursement Changes and Cancel Unsent Changes options.
Concept: Alternative Loans	UPDATED Updated the description of the Alternative Loan Application Send Response Inbound integration and the Create Manual Response task to provide the conditions when Workday updates the alternative loan status to Lender Cancelled.
Reference: Alternative Loan Statuses	UPDATED Added a new Lender Cancelled alternative loan status and its description to the table.
Reference: Total Financial Assistance and Disbursement Changes in Real Time	NEW Provides an example with scenarios about the real-time updates to a student's total financial assistance and disbursements when you make disbursement changes using the Initiate Change task.

Recruiting and Admissions

Create Educational Institution Courses	UPDATED On Step 3, added the Effective Date row. Added Steps 4 to 6.

	In the Result and Next Steps sections, added information about viewing and editing course versions.
Add External Transcripts	UPDATED On Step 6, • Expanded the Academic Area, Course Title, and Course Designations row to describe how Workday populates these fields based on educational institution course version. • Added the Course Repeat Code row.

Student Financials

Concept: Real-Time Student Accounts	NEW
Configure Real-Time Student Accounts	NEW
Setup Considerations: Student Charges	UPDATED Added a new report description to the Reporting section: Find Inactive Student Financials Period Records with Active Charge or Waiver Transactions.
Mass-Apply Student Charges	NEW
Troubleshooting: Student Waivers	UPDATED Added information about missing waivers when you use a third-party solution for financial aid.
Steps: Set Up Refund Recovery Charges	UPDATED • Replaced the bullets in the Results section for clarity. • Added additional examples in the Example section for clarity.

Student Records

Create Courses	UPDATED On Step 2, added the Typical Periods Offered row.
Reference: Course Section View and Course Section Definition View	UPDATED Added information about tabs in the Data row.
Reference: Reports for Finding and Viewing Courses and Sections	UPDATED Updated to mention published and past course sections.

Steps: Set Up Student Registration	**UPDATED** Added a new Step 7 with information about the new registration troubleshooting summary functionality.
Set Up Summaries for Registration Troubleshooting	**UPDATED** How to set up student registration troubleshooting summaries.
Steps: Manage Student Registrations	**UPDATED** In the Steps section: • Added a new Step 2 to include information about the new registration appointment refresh functionality. • Combined Steps 6 and 7 for clarity.
Schedule Registration Appointment Refreshes	**UPDATED** How to schedule refreshes for registration appointments.
Concept: Registration Drops, Withdrawals and Swaps	**UPDATED** Added information about the new course swap functionality for administrators.
Set Up Institutional Unit Type Conversion Policies	**UPDATED** Expanded the Context section to include information about unit type conversion for course units earned and attempted on external transcripts.
Set Up Load Status Policies	**UPDATED** In the Override Academic Period Type row, added a link to Concept: Standard and Nonstandard Academic Periods topic.
Steps: Set Up Transfer Credit Evaluation	**UPDATED** Added Step 3 about configuring domain security access.
Set Up External Unit Type Conversion Policies	**UPDATED** In the Context section, clarified how Workday uses conversion policies for course units earned and attempted on external transcripts.
Create Educational Institution Transfer Credit Rules	**UPDATED** On Step 4, removed the Preferred Unit Type row. Expanded the Minimum Units row to describe the Unit Type field.

	Expanded the Result section to describe how Workday uses the course units earned and attempted on external transcripts.
Steps: Evaluate and Manage Transfer Credits	UPDATED In the Prerequisites section, added the Manage: Create Transfer Credit Rules and Evaluate Student Transfer Credit domain.
Reference: Transfer Credit Evaluation Troubleshooting	UPDATED For the row on unit type conversion, added that Workday looks at the effective version of the transfer credit rule, which specifies the minimum units to receive transfer credit.
Create Custom Notifications for Grade Events	UPDATED Included additional details in step 2 for Repeat On

Use Case Library

December 12, 2025

Use Case: Create Engagements	UPDATED Provides a process flow for creating an engagement.

October 31, 2025

Use Case: Set Up Cloud Connect for Learning Using Legacy Tasks	NEW Provides a workflow in Workday when setting up cloud connect for learning using the legacy tasks.

September 19, 2025

Use Case: Reporting Tools in Workday	UPDATED Describes Reporting Tools and their use cases in Workday.

Workday Documentation - In Depth

October 3, 2025

Find, Filter, and Download Release Notes	UPDATED Added: • Links to step 4 for common date range filter examples. • Descriptions to step 6 for Product Line, Product Area, Retirement, and Change Log columns.
Find, Filter, and Download Release Notes	UPDATED Updated Step 2 to clarify using the search bar.
Subscribe to Release Notes	UPDATED Added optional step for using product tags.
Reference: Workday Release Center	UPDATED In the Feature Delivery and the Release Center Updates section, updated links for: • The Information Experience Enhancements Community article to the new Workday Documentation Announcements page. • Delays and reversions from the retired Community article to a filtered search link in the Release Center.

September 19, 2025

Concept: What's New in Workday Report	UPDATED Clarified date range usage in the Report Filters section.

Workday VNDLY

December 12, 2025

Bulk Updates and Uploads

Create Bulk Updates Using File Uploads	UPDATED

	Updated to include information about Export # records to file option and deletion option.

Notifications

Set Up Reminder Notifications	NEW How to set up reminder notifications.

Reporting

Reference: Filter Operators	NEW Provides additional information about report filter operators.

Statement of Work (SOW)

Set Up Statement of Work Settings	UPDATED Added information about new setting for adding tax overrides on SOW milestone and scheduled payments.

Taxes

Add Tax Overrides to Work Orders	UPDATED Updated with information about adding tax overrides to existing work orders.
Add Tax Overrides to SOW Milestone and Fixed Price Payments	NEW Explains how to add tax overrides to SOW milestone and fixed price payments.

Timesheets

Set Up Timekeeping Setting Defaults	UPDATED On the Disable Time import Validations setting, clarified the functionality with imported time sheets.

Vendors

Suspend a Vendor	NEW How to suspend a vendor

November 28, 2025

Bulk Updates and Uploads

Reference: Work Order Statuses for Bulk Updates	NEW Provides additional information about supported work order statuses for bulk update actions.

Integrations

Reference: Workday to VNDLY Foundational Field Mapping	UPDATED Added PDF for API information.
Reference: Workday to VNDLY Transactional Field Mapping	UPDATED Added PDF for related API Requests.

Work Orders

Steps: Configure Work Order Settings	NEW How to configure work order settings.
Configure Work Order Defaults	UPDATED Added steps, removed vendor actions information.
Create Work Order Rules	UPDATED How to create work order rules in settings.
Configure Vendor Actions	UPDATED How to configure vendor actions.
Create Approval Fields	UPDATED How to create field sets for work orders.
Update Work Orders	UPDATED How to update work orders.
Backdate Work Orders with Previously Approved Timesheets	UPDATED Revised steps 3 and 4 to match consolidated work order updates.

Reference: Work Order Permissions	UPDATED Provides additional information about work order permissions.

November 14, 2025

Bulk Updates and Uploads

Reference: Bulk Uploads	NEW Provides additional information about bulk uploads, how to access them, and what permissions you need.

Candidates

Bulk Upload Candidates	UPDATED Moved the information from step 4 to the Next Steps section.

Integrations

Steps: Set Up the VNDLY Contingent Worker Team	UPDATED Added a paragraph to the context that explains users are unable to set up the VNDLY Contingent Worker Team when proxied.

Job Workflow and Settings

Apply Candidates to Jobs	NEW How to apply candidates to jobs.

Statement of Work (SOW)

Set Up Statement of Work Settings	UPDATED Updated topic with information about SOW Close Type setting.

Vendors

Add a Vendor	UPDATED In the Context: • Corrected the access from the header.

	• Added information about bulk uploading vendor data.
Bulk Upload Vendors	UPDATED Corrected step 3 and moved the information from step 4 to the Next Steps section.

October 31, 2025

Expenses

Steps: Set Up Expenses	NEW How to set up expenses.
Create Expense Report Types	NEW How to create expense report types.
Create Expense Mileage	NEW How to create expense mileage.
Configure Expense & Adjustment Settings	NEW How to create expense mileage.
Create Expenses	NEW How to create expenses.
Create Miscellaneous Adjustments	NEW How to create miscellaneous adjustments.
Bulk Upload Expenses	NEW How to bulk upload expenses.

Invoicing

Concept: Manual and Scheduled Invoicing	NEW Describes the concept of manual and scheduled invoicing in Workday VNDLY.

Pre-Identified Workflows

Pre-Identify Job Candidates During Job Publish	UPDATED

	Added information about the Job Applications settings page and the source type for pre-identified candidates.
Pre-Identify Candidates After Job Publish	UPDATED Added information about the Job Applications settings page and the source type for pre-identified candidates.

October 17, 2025

Checklists

Add a New Checklist	UPDATED Added information about optional Custom Field Setup settings.
Add Custom Fields to Checklist Actions	NEW Added new topic for adding custom fields to checklist actions.

Pre-Identified Workflows

Pre-Identify Job Candidates During Job Publish	UPDATED Updated to focus on pre-identifying candidates during job publish.
Pre-Identify Candidates After Job Publish	NEW Added new topic for pre-identifying candidates after job publish.

October 3, 2025

Bulk Updates and Uploads

Create Bulk Updates	UPDATED Added information about the Adhere to Checklist Rules check box to step 8.

Navigation

Save Filter Settings	UPDATED Removed the list of pages with filters.

Reporting

Manage Reports	UPDATED Removed the note that said the new reporting module is not available to all customers.
Manage Report Settings	UPDATED Removed the note that said the new reporting module is not available to all customers.
Add Calculated Fields	UPDATED Removed the note that said the new reporting module is not available to all customers.
Add Fields to Your Reports	UPDATED Removed the note that said the new reporting module is not available to all customers.
Add Filters to Your Reports	UPDATED Removed the note that said the new reporting module is not available to all customers.
Set Up Sort Criteria for Your Reports	UPDATED Removed the note that said the new reporting module is not available to all customers.
Copy Existing Reports	UPDATED Removed the note that said the new reporting module is not available to all customers.
Create Custom Reports	UPDATED Removed the note that said the new reporting module is not available to all customers.
Create Reports from Templates	UPDATED Removed the note that said the new reporting module is not available to all customers.
Change Report Types	UPDATED Removed the note that said the new reporting module is not available to all customers.
Manage Report Versions	UPDATED

	Removed the note that said the new reporting module is not available to all customers.
Download Report Builder Schema	UPDATED Removed the note that said the new reporting module is not available to all customers.
Configure Reports	UPDATED Removed the note that said the new reporting module is not available to all customers.
Schedule Reports	UPDATED Removed the note that said the new reporting module is not available to all customers.
Concept: Activity Log for Reports	UPDATED Removed the note that said the new reporting module is not available to all customers.
Concept: Reporting Permissions	UPDATED Removed the note that said the new reporting module is not available to all customers.
Reference: Calculated Fields in Reports	UPDATED Removed the note that said the new reporting module is not available to all customers.
Reference: Reports Page	UPDATED Removed the note that said the new reporting module is not available to all customers.

Work Orders

Concept: Source Types	NEW Describes the concept of Source Types in Workday VNDLY.
Troubleshooting: Source Types	NEW How to diagnose and resolve source types for pre-identified candidates.

September 19, 2025

Bulk Updates and Uploads

Concept: Bulk Updates	UPDATED Added information about the Created By field and the Updated Records section of the Bulk Updates page.

Foundational Configurations

Configure Emails and Tags	UPDATED Explains how to configure email and tag notifications at the company setting level.
Reference: Miscellaneous Tenant Settings	UPDATED Details miscellaneous tenant settings for VNDLY.

Integrations

Steps: Set Up the VNDLY Contingent Worker Team	NEW How to set up the VNDLY Contingent Worker Team section of the Manager Insights Hub in Workday.
Configure the Contingent Worker Team Section	NEW How to configure the Contingent Worker Team section in Workday.

Statement of Work (SOW)

Set Up Statement of Work Settings	UPDATED Added information about the Remove SOW Role Org Unit Restriction setting.
Duplicate Roles and Payments on Statements of Work	NEW Added new topic for duplicating SOW roles and payments.

Users and Security Settings

Configure Contractor as Manager	UPDATED Demonstrates how to configure manager profiles for contractors.

Vendors

Vendor Resend Credentials	NEW How to resend contractor login credentials.