Administrator Guide Release Notes May 2023

Product Summary

May 2023

This content is not part of the Workday Administrator Guide and is subject to further change.

Contents

Adaptive Planning

Headcount Planning

Steps: Set Up Headcount Planning	NEW How to set up headcount planning that uses activated workforce planning configuration managers and shared participation.
Steps: Set Up Headcount Planning Integration System User	NEW How to set up an integration system user for headcount planning background jobs.
Create Headcount Plans	NEW How to create headcount plans, initiate a headcount planning event, and generate headcount planning Inbox items.
Manage Headcount Planning Events	NEW How to manage a headcount planning event using a Headcount Planning Event Inbox item for plan controllers.
Complete Headcount Planning Participant Detail Events	NEW How to enter headcount planning data using the form that you can access from a Headcount Planning Participant Detail Event Inbox item for plan participants.
Troubleshooting: Recreate Modeled Accounts for Headcount Planning	NEW How to diagnose and resolve missing formulas on recreated modeled accounts for headcount planning baseline versions.

Publish Plans from Adaptive Planning

Publish Workforce Planning Actions from Adaptive Planning	UPDATED Added a bullet in the prerequisites to give publishers Edit access to all accounts on the sheet if you use access rules.

Authentication and Security

Authentication

Add Authentication Rules	UPDATED Added information for the new Any except other conditions Authentication Condition in Step 3.
Concept: Authentication Policies	UPDATED Modified the How Workday Processes Authentication Policies section to explain how Workday evaluates authentication conditions with the new Any except other conditions option.
Register API Clients	UPDATED Added information in steps 6 and 17 to explain that Workday only supports cross-origin requests for clients that use the Authorization code grant type with PKCE support.

Configurable Security

Reference: Security-Related Reports	UPDATED Updated the Action Summary for Security Group description to specify the types of domains the report identifies.
Reference: Workday-Delivered Security Groups	UPDATED Added a bullet point to the Initiator security group, noting that issues can arise when using it for routing and notifications.
Example: Configure Intersection Security Groups for Location-Based Restrictions	UPDATED In Step 1, substep d, renamed the prompt titled Assigned To, to Locations.
Create Security Rules	UPDATED Added a prerequisite stating that you must enable report fields that you want to specify in security rule conditions.
Example: Create a User-Based Security Group for Administrators	UPDATED Added a note to step 4, identifying restrictions in transactions administrators can initiate.

Setup Considerations: Security Policies	**UPDATED** Updated the Limitations section to include restrictions on self-initiating transactions, such as requesting compensation changes.

Data Privacy

Reference: Purgeable Data Types	**UPDATED** Added information about Student Financials - Direct PLUS Loan Authorization (Attachments Only) as a new Purgeable Data Type. Added information about Recruiting Agency User Documents (Attachments Only) as a new Purgeable Data Type. Clarified that when you purge a candidate who has a worker profile with candidate documents, Workday removes the candidate documents from the worker profile.
Setup Considerations: Data Scrambling	**UPDATED** Added the View Data Scrambling Plan Status History report to the table in the Reporting section.
Concept: Data Scrambling	**UPDATED** Added information to explain: • The tasks and reports involved in the data scrambling process in the How Data Scrambling Works section. • The Start Data Scramble task options in the How Data Scrambling Works section. • How to scramble large volumes of data and how to process multiple scramble plans, in the Other Considerations section.

Security for Integrations

Concept: PGP Certificates in Workday	**UPDATED** Corrected the descriptions of how PGP works in the About PGP table.

Budgets

Position Control

Create Payroll Commitment Rules	UPDATED In the note for Earning, added information about selecting the **Use Weekly Hours** check box for hourly frequencies from the **Maintain Frequencies** task as a best practice.

Education and Government

Grants Management

Create Grants	UPDATED In the table, added a row for Inactive to describe how to inactivate a grant and set up worktag usage to prevent inactive grants from being added to spend transactions.
Create Facilities and Administration Exceptions	UPDATED On the row for Basis Types, clarified that you can select a different basis type than the basis type on the F&A rate agreement, provided the basis types share the same object class set.
Reprocess Award Costs	UPDATED For clarity, renamed the topic from Recalculate Facilities and Administration Costs and Revenue to Reprocess Award Costs. In the Context section, clarified that Reprocess Award Costs doesn't update the object classes on the original spend transaction, F&A cost, or revenue journal lines.
Create Awards	UPDATED In Step 3, on the row for Exception, added that the basis type must have the same object class set as the basis type on the F&A rate agreement.
Create Salary Caps	UPDATED In the Context section, clarified that you must have Workday Payroll to use Salary Caps.

Financial Management

Accounting Center

Create Manual Accounting Center Detailed Journals	UPDATED Updated Step 17 with the number of high-volume journals that are initially displayed on the the View Accounting Center Detailed page.

Business Assets

Setup Considerations: Asset Tracking	NEW Information to consider before setting up Asset Tracking.
Steps: Set Up Asset Tracking	UPDATED Moved information to Setup Considerations: Asset Tracking.
Concept: Pooled Assets	UPDATED For clarity: • Added a section on automatic and manual asset pooling. • Replaced information on pooled and composite assets with a reference to Concept: Composite Assets.
Set Up Asset Pooling Rules	UPDATED Renamed the topic from Create or Edit Asset Pooling Rules.
Set Up Trackable Line Reviews for Assets	NEW How to set up the review of trackable lines for assets.
Review Trackable Lines for Assets	UPDATED Moved content to Set Up Trackable Line Reviews for Assets.
Adjust Asset Costs	UPDATED Updated to reflect that you can now enter different adjustment amounts by book.
Impair Assets	UPDATED Updated to reflect that you can now impair assets by percentage.

Common Financial Components

Steps: Set Up a Single Legal Entity	UPDATED Clarified company relationship functionality.

Customer Accounts

Setup Considerations: Customer Accounts	NEW Setup considerations for Customer Accounts.
Example: Create a Condition Rule to Prevent Creating Duplicate Customers	NEW How to create a condition rule to prevent creating duplicate customers.
Steps: Create Customer Refund Payments in Settlement Runs	NEW How to generate customer refund payments in settlement runs to reflect the refund payment date.
Concept: Customer Refunds	UPDATED Deleted the section about the option to opt in to the enhanced customer refund functionality.
Steps: Set Up Customer Statements	UPDATED Update the Customer Statement Email Event business process name to Customer Statement Event in Step 2.

Expenses

Create Expense Items	UPDATED Added a note to step 6 about Workday resetting the accumulated amount on an expense item when you change the attribute to evaluate on its associated rate table.
Concept: Expense Protect	UPDATED Expanded on machine learning model for duplicate expenses.
Steps: Set Up Expense Protect	UPDATED Clarified when Expense Protect is available and when risk insights and risk levels display.
Set Up Expense Risk Levels	UPDATED

	Clarified when risk insights and risk level columns display.

Financial Accounting

Steps: Maintain Access to Ledger Accounts	UPDATED Updated the topic to include security and additional steps to create segment -based security groups.
Example: Set Up the Journal Lines by Allocation Report	NEW Illustrates how to set up a custom report to identify which allocations produce the most journal lines.
Concept: Report Administrator Dashboard	UPDATED Updated topic to add descriptions to reports that are available as worklets. Also, included tasks that you can add to the Dashboard Menu.

Financial Transaction Taxes

Set Up Tax Authorities	UPDATED • Moved information about creating tax authorities from a business entity to Steps: Set Up Transaction Taxes. • Clarified that Workday now uses the rounding definition for posting to the ledger and for display on taxable documents, when these amounts are in the tax reporting currency.
FAQ: Why do 2 identical invoice lines have different tax amounts?	UPDATED • Renamed the topic from FAQ: Transaction Taxes. • Moved content from Concept: Transaction Tax Calculations. • Removed the second question, as Workday now applies the rounding definition to all amounts in tax reporting currency.
Setup Considerations: Combined Federal/State Filing Program	UPDATED Added information about: • Questions to consider before setting up the Combined Federal/State Filing Program in Workday. • Recommendations. • Integrations that you can use to set up this feature.
Steps: Set Up 1099 Reporting	UPDATED Added information about:

	• Prerequisites. • Steps when you opt in to the Combined Federal/State Filing Program. • Payments that Workday includes in 1099 returns.
Set Up 1099 Payees	UPDATED Added information about default withholding tax codes.

Project Billing

Concept: Manage Project Billing Transaction Configurations	NEW Describes the concept of configuring project billing transactions in Workday.

Projects

Reference: Causes of Labor Cost Summary Reversals	NEW Information about what causes Workday to reverse labor cost summaries.
Steps: Create Parent-Child Project Budgets	UPDATED Renamed topic, formerly Steps: Create Consolidated Project Budgets. Added a link in Step 3 to a supporting topic in the Budgets book.

Revenue

Concept: Foreign Currency Customer Contracts	UPDATED Updated base currency to ledger currency for clarity.
Concept: Usage-Based Contract Pricing	UPDATED Added information on pricing for negative usage-based transactions in a first tier when billing rates reset by transaction.
Create Ledger Currency Adjustment Installment	UPDATED Renamed to Create Ledger Currency Adjustment Installment. Updated base currency to ledger currency for clarity.
Setup Considerations: Period End Revenue Accounting	UPDATED

	In the Limitations section, removed a bullet on worktag balancing for foreign currency adjustment journals.
Steps: Reclassify Customer Contract Assets and Liabilities	UPDATED In Step 4, removed a reference to foreign currency adjustment tasks.

Settlement

Steps: Configure Advanced Cash Balance Checking	UPDATED Expanded for better usability by adding: • Detailed information in the Results section. • Standard reports that you can use to view cash balance check exceptions to resettle in a new Next Steps section.
Steps: Set Up Checks and Advices for Printing	UPDATED Added Step 5 for information on positive pay files.
FAQ: Check and Advice Printing	UPDATED Merged all check and advice printing FAQ information into this topic and renamed topic to FAQ: Check and Advice Printing, for clarity.

Supplier Accounts

Steps: Set Up Machine Learning Recommendations for Worktags	UPDATED Updated to reflect that you now select worktag types to receive recommendations for using the new Maintain Machine Learning Prompt Recommendations task.

Human Capital Management

Absence

Setup Considerations: Absence Management	UPDATED Added information on the limitation for Time Off Entries in integrations.
Setup Considerations: Time Off Plans	UPDATED

	In the Connections and Touchpoints section, removed mention that Workday Assistant doesn't support position-based time off plans.
Setup Considerations: Time Off	UPDATED In the: • Connections and Touchpoints section, removed the bullet on Workday Assistant not supporting position-based time off plans. • Reporting section, added the View Worker Time Off Eligibility by Organization report.
Concept: Eligibility for Time Off Plans, Time Off, and Accruals	UPDATED Included details about the View Worker Time Off Eligibility by Organization report.
Concept: Time Off in Workday Assistant	UPDATED Removed position-based time off plans from the bullet list of what Workday Assistant doesn't support.
Create Accruals	UPDATED Revised the description for the Based on As of Date option in Step 3.
Create Based-on-As-of-Date Accruals	UPDATED Clarified that accrual values can change during the period if a worker gains or loses eligibility to the accrual itself or calculations within the accrual resolve differently.
Example: Bulk Load Time Off Requests into Workday	UPDATED Added information on the limitation for Time Off Entries in integrations.
Concept: Importing Time Off Request Events	UPDATED Added information on the limitation for Time Off Entries in integrations.
Reevaluate Absence Table Time Off Entries	UPDATED Clarified that you can only reevaluate and correct approved time off for specific workers if you have permission to correct their time off.
Concept: Absence Tables Conditional Cascading	UPDATED

	Clarified that the feature: • Only applies to absence tables when you enable them for absence occurrences. • Doesn't apply to absence tables that are part of a custom type.
Example: Create Quantity-per-Occurrence Calculations Starting in the Prior 12 Months	UPDATED Replaced the previously incorrect 2nd Operand value of 3 with 2 in Step 1.c.
Setup Considerations: Accrual Adjustments and Overrides	UPDATED Clarified that: • The accrual calculation evaluates differently based on the Automated Accrual Adjustment step in the Questions to Consider section. • Automated accrual adjustments don't create adjustments that exceed the upper or lower limits for the time off plan in the Limitations section.
Setup Considerations: Absence Balances	UPDATED Clarified when you can prorate absence accrual calculations in the Questions to Consider section.
Steps: Prorate Front-Loaded Balances	UPDATED Clarified that the Automated Accrual Adjustment service step triggers when Workday detects a change in worker eligibility based on a conditional calculation within an accrual.
Reference: Time Off Reports	UPDATED Added the My Time Off Balances Details and the Worker Time Off Balances Details reports to the Report Availability and Balance Tracking section.
Troubleshooting: Time Off	UPDATED Clarified that you can only reevaluate and correct approved time off for specific workers if you have permission to correct their time off.
Setup Considerations: Leave of Absence	UPDATED Added the View Worker Leave of Absence Eligibility by Organization report to the Reporting section.
Create Leave Types	UPDATED

	In Step 7, added a description for Calendar Display.
Reference: Additional Fields for Leave Types	UPDATED Added a description for the Case Number field for leave types.

Benefits

Create Insurance Rates	UPDATED Added new Calculate As Of option in the table under step 5.
Create Insurance Plans	UPDATED • Changed instances of "Age Reduced/Reduction" to "Age Adjusted/Adjustment." • Added new Calculate As Of option "Last Date of Previous Pay Period."
Concept: Hiding Benefit Plans from Configuration Prompts	UPDATED Removed the word Enrollment from the Create Cross Plan Insurance Coverage Maximum and Create Cross Plan Insurance Percentage Maximum task names.
Steps: Manage Open Enrollment	UPDATED Added security in the Context section for access to the Open Enrollment Status Report, Manage: Benefits for Organizations in the Benefits functional area.
Finalize Open Enrollment Elections	UPDATED Added security in the Context section for access to the Open Enrollment Status Report, Manage: Benefits for Organizations in the Benefits functional area.
Concept: Benefits Enrollment Events on Mobile	UPDATED Updated the topic to include information about mobile enrollment support for life events.
Concept: Enrollment Status Indicators	NEW Describes behavior of the status indicators on benefit coverage cards during an enrollment event.
Create Affordable Care Act Measurement Periods	UPDATED Clarified when to enable the Include in Passive Event Processing check box in step 3.

Manage Dependents and Beneficiaries	**UPDATED** Added information about dependent verification to Add Dependent step, as well as the associated, new security domains to prerequisites.

Compensation

Steps: Configure Internal Compensation Benchmarks	**UPDATED** Updated information on the Internal Compensation Benchmark Threshold tenant option.
Concept: Locality Pay Areas	**UPDATED** Added paragraph stating feature is for all customers, based on customer feedback.

Learning

Example: Create Saved Searches for Custom Learning Sliders	**UPDATED** Illustrates how to create a custom report to save searches for custom learning sliders.
Steps: Set Up Extended Enterprise Affiliations	**UPDATED** Added information to Step 1 about editing existing locations.

Recruiting

Set Up Recruiting to Staffing Field Defaults	**UPDATED** Added information on configuring calculated fields when setting up defaults.
Steps: Set Up Candidate Security	**UPDATED** Consolidated the domain lists in Step 1 in tables with additional information. Added information about the new Active Interviewer, Interviewer, and Candidate Share security groups to: • The Context section. • Step 2 as optional security groups.
Configure Prospect Consent Terms and Conditions	**UPDATED** Updated Terms and Condition section.

Steps: Maintain Custom Candidate Pool Grids	UPDATED Added information about prefilters for dynamic candidate pools.
Concept: Purge Recruiting Data	NEW Explains purge of candidate data.
Steps: Set Up Internal Job Alerts	UPDATED Removed Union from supported job alert filters.
FAQ: Recruiting Campaign Email Analytics	NEW How to resolve message count discrepancies.

Skills and Skills Cloud

Steps: Maintain Skills	UPDATED Moved this topic and all other Skills topics from the Talent section to the new Skills and Skills Cloud section.
Setup Considerations: Skills Cloud	UPDATED Moved this topic and all other Skills Cloud topics from the Talent section to the new Skills and Skills Cloud section.

Staffing

Steps: Set Up Defaults for Service Dates	UPDATED Added information on configuring calculated fields when setting up defaults.
Create Job Requisition for Multiple Existing Positions	NEW How to create a job requisition for multiple existing positions.

Talent

Setup Considerations: Career Hub	UPDATED Expanded the Connections and Touchpoints section to include a row highlighting the ability for workers to include individual goals in Career Hub Plan.

Steps: Set Up Career Hub	UPDATED In step 10, added a row for Edit Plan Preferences, highlighting the administrator task to allow individual goals in Career Hub Plan.
Concept: Career Hub	UPDATED Added content to the Plan section regarding individual goals in Career Hub Plan.
Reference: Career Hub Security	UPDATED Updated table: • With permissions details for the existing Self-Service: Employee Goals and Set Up: Goals domains. • With additional details for the existing Set Up: Career Hub and Opportunity Marketplace domain.
Configure the Feedback Section	UPDATED Added a link in the Date Range row of the step 4 table to the Concept: Date Range for Feedback in Reviews topic.
Concept: Date Range for Feedback in Reviews	NEW Describes the Date Range options when configuring the Feedback section in employee review templates.
Concept: Printed Employee Reviews	UPDATED • Added the Generate a Print Document (PDF) section. • Clarified that for performance reviews and development plans, the review printout only includes requested feedback received from the employee review as part of the Get Feedback from Review process.
Concept: Load Content from Previous Review	UPDATED Clarified that you can't carry over Competency ratings if the proficiency scale changes from the previous review to the new review.
Concept: Employee Goals in Employee Reviews	UPDATED Removed the reference in the Load Relevant Goals section to Workday loading goals by category based on criteria listed in the previous paragraph.
Steps: Set Up Performance Improvement Plans	UPDATED

	Added step 1 to edit the Complete Manager Plan for Performance Improvement Plan business process to enable comments.
Setup Considerations: Requested Feedback	UPDATED Added a limitation that Workday doesn't support workers reassigning a request to give feedback.
Steps: Set Up Mass Operation Feedback Events	UPDATED Updated the step 1 business process instructions for clarity.
Steps: Set Up Mentorships	UPDATED Expanded the Next Steps section with a bullet stating that the Manage Mentorship subprocess is cancelable.
Add Members to Static Talent Pools	UPDATED In the Prerequisites section, removed the bullet about the Job Applications, Prospects and Referrals business object.
Concept: Talent Pool Security	UPDATED In the Talent Pool Domains table, added a row for the Private Talent Pool (Limited Owner Access) domain.
Example: Set Up the Private Talent Pool (Limited Owner Access) Domain	NEW Illustrates how to set up the Private Talent Pool (Limited Owner Access) domain.
Steps: Set Up Upload My Experience	UPDATED Removed the rows in the step 2 table for Self-Service: Manage Authorized Applications and Manage Authorized Applications.

Time Tracking

Steps: Set Up Worktags for Time Entry	UPDATED Updated to add information about how Workday derives project-related worktag default values.
Set Up Time Submission	UPDATED Migrated content from Concept: Edit and Approve Time to this topic. In Step 2, added information about the Edit and Approve Time report.

Example: Calculate Minimum Rest Time	UPDATED Clarified how the grace period works and corrected the example.
Set Up the Review Time Report	UPDATED Migrated content from Concept: Edit and Approve Time to this topic. In Step 1, added information about the Edit and Approve Time report.
Concept: Edit and Approve Time	UPDATED Migrated content to the Set Up Time Submission topic and the Set Up Review Time Report topic.

Workday Scheduling

Steps: Set Up Static Scheduling	NEW How to set up static schedules in Workday Scheduling.
Concept: Scheduling Organizations	NEW Information about the different types of organizations you can use in Workday Scheduling.

Worker Information

Access an Encrypted National ID	UPDATED Expanded Step 1 to mention that migrating a National ID to an uncached data state might have an impact on integrations.
Steps: Set Up Skills and Experience	UPDATED Moved this topic and other Skills and Experience topics from the Talent section to the Worker Information section.
Steps: Set Up Competencies	UPDATED Moved this topic and all other Competencies topics from the Talent section to the Worker Information section.
Steps: Set Up Certifications	UPDATED Moved this topic and other Certifications topics from the Talent section to the Worker Information section.

Steps: Set Up Job History	UPDATED Moved this topic and all other Job History topics from the Talent section to the Worker Information section.
Steps: Set Up Talent Statements	UPDATED Moved this topic and all other Talent Statements topics from the Talent section to the Worker Information section.

Integrations

Data Initialization Service (DIS) Integration

Concept: Data Initialization Service (DIS)	UPDATED Added information about file data types.

Financials Connectors

Concept: EDI Connector Pre and Postprocessor Common Use Cases	NEW Describes the concept of EDI connector pre and postprocessor common use cases.
Reference: EDI Connector Pre and Postprocessor Common Use Cases	NEW Provides additional information about EDI connector pre/post-processor common use cases.

Getting Started with Workday Connectors

Reference: Student Connectors Catalog	UPDATED Added the National Student Clearinghouse Connectors row. On the Student Records Connectors row, changed the description to describe the transcript outbound connector.

HCM Connectors

Steps: Create an External Client CredStore for Google Calendar	UPDATED Added a description for the Token Endpoint field.
Create an External Client CredStore for Microsoft Outlook	UPDATED

	Added a description for the Token Endpoint field.
Complete Set Up and Upgrade Prerequisites for E-Verify Integration	UPDATED Updated information on how to create an E-Verify staging accounts.
Concept: Okta Integration	UPDATED Revised Launch/Schedule and Launch Parameters sections to provide better guidance.

Integration Services

Set Up Integration Subscriptions	UPDATED Added information about integration conditions and rules.

Security for Integrations

Concept: PGP Certificates in Workday	UPDATED Corrected the descriptions of how PGP works in the About PGP table.

Student Connectors

Setup Considerations: National Student Clearinghouse Connectors	NEW Information to consider before setting up National Student Clearinghouse connectors.
Concept: National Student Clearinghouse Connectors	UPDATED Renamed from Concept: National Student Clearinghouse Reporting to Concept: National Student Clearinghouse Connectors. Clarified content about typical attendance patterns and academic periods for considering continuous enrollment. Added content about launch and schedule options.
Reference: NSC Enrollment Reporting Outbound Connector	UPDATED Clarified information about load status considerations of effective dates and previous academic periods in these sections: • Status Start Date • Program Enrollment Status Effective Date

Concept: Student Records Connectors	**UPDATED** Moved content about National Student Clearinghouse (NSC) connectors to Concept: National Student Clearinghouse Connectors.

Third-Party Payroll Connectors

Reference: File Schema for Payroll Effective Change Interface	**UPDATED** Added a note about a field override limitation in the schema file.
Reference: Data Sections for Payroll Interface	**UPDATED** Added: • The new Personal Data by Country data section. • The new Status Row data section fields and related information. • A note to the Personal Data data section description.
Setup Considerations: Worker Effective Change Interface	**UPDATED** Updated the number of workers that WECI supports processing for to 500,000.
Concept: Worker Effective Change Interface	**UPDATED** Added a note about a field override limitation in the schema file.
Reference: Data Sections for Worker Effective Change Interface	**UPDATED** Added the Compensation Element field to the Compensation Plans subdata sections.
Steps: Set Up External Payroll Results Inbound Integration	**UPDATED** In Step 6, expanded the list of domains that the Integration System User (ISU) must access.
Concept: External Payroll Results Inbound Integration	**UPDATED** Added a Removal section.
Steps: Set Up External Payroll Documents Integration	**UPDATED** In Step 2, added information on the date format for integration attributes.

Concept: External Payroll Documents	UPDATED Updated to include the Process Monitor report.
Set Up Information to Reconcile	UPDATED Added the special characters that we support to the Ignore Space and Special Characters option.
Troubleshooting: Global Payroll Reconciliation Configuration	NEW How to diagnose and resolve Global Payroll Reconciliation configuration errors.
Troubleshooting: Global Payroll Reconciliation Results	NEW How to diagnose and resolve Global Payroll Reconciliation result errors.

Workday Extend

Reference: Limits on Model Components	UPDATED Added limits on `MULTI_INSTANCE` fields.
Reference: Orchestration Runtime Limits	UPDATED Changed the sync orchestration runtime duration from 20 minutes to 5 minutes.

Workday Payroll Connectors

Set Up Banking for ADP Check Print Integration	UPDATED Removed the Outsourced Bank Provider row from table in step 2. Created a substep that explains how to integrate an outsourced provider with an associated bank account.

Workday REST API

Concept: Workday REST APIs	UPDATED Noted the ability to try REST APIs on the Workday REST Services Directory.
Concept: Cross Origin Resource Sharing (CORS)	UPDATED

	Added information to explain that Workday only supports cross-origin requests for the OAuth Authorization Code flow with Proof Key for Code Exchange (PKCE).
Steps: Load Data into a Table Using Data Change with the REST API	UPDATED Added information on accessing Data Change Activities history from the Prism Activities Dashboard.

Manage Workday

Business Processes

Concept: Completion Steps	UPDATED Clarified setting an Approval step as a Completion step.
Concept: Action Step	UPDATED For clarity, removed the sentence on not being able to add a Review action after a Completion step.
Setup Considerations: Auto-Manage Business Processes for Worker	UPDATED Added information to Limitations section to state you can't configure the Auto-Manage Business Processes service step in parallel with another step.
Setup Considerations: Mass Operations on Business Processes	UPDATED Added information about the maximum volume of events that can be canceled using the Mass Cancel Business Processes task.
Steps: Set Up Auto-Manage Business Processes Service Step	UPDATED Added Context information about configuring in parallel with another step.
Concept: Custom Notifications	UPDATED Expanded the Notification Delays section to clarify what business processes can have a delayed notification.

Collaboration

Setup Considerations: Campaigns	UPDATED

	Added a bullet to the Recommendations section to clarify when to use the Schedule Campaign Run and Launch / Schedule Campaign tasks.
Concept: Campaigns and Scheduled Distributions	UPDATED In the Launching Campaigns section, added recommendations for when to use the Launch / Schedule Campaign and Schedule Campaign Run tasks.
Steps: Set Up Security for Workday for Microsoft Teams and Workday for Slack	UPDATED Added testing recommendation to Step 4.
Steps: Set Up Workday for Microsoft Teams and Workday for Slack	UPDATED In Step: • 2, corrected the first Graph API permission. • 8, removed the requirement to set up time off in Workday Assistant before configuring time off notifications in Workday Everywhere.
Concept: Workday for Microsoft Teams and Workday for Slack	UPDATED In the Capabilities section, clarified which capabilities are supported in Workday Everywhere and enabled by Assistant.
Setup Considerations: Surveys	UPDATED • Added the Questionnaire Results domain to the Security section. • Added links to relevant topics for the Survey Responses description in the Reporting section.
Create and Send Surveys	UPDATED Expanded step 7 with a link to the Steps: Set Up Survey Notifications and Campaigns topic.

Organizations

Setup Considerations: Organizations	UPDATED In the Questions to Consider and Recommendations section, added information on custom organizations.
Steps: Assign Membership Rules in Custom Organizations	UPDATED Clarified that the View Organization Members report and View Members As Of related action might display different results.

Concept: Membership Rules	UPDATED Clarified that the View Organization Members report and View Members As Of related action might display different results.
FAQ: Membership Rules	UPDATED Added: • Information about using the View Organization Members report to view custom organizations with more than 50,000 workers. • Clarification that the View Organization Members report and View Members As Of related action might display different results. • Instructions for configuring membership rules that include more than 10,000 positions.

Roles

Concept: Assign Roles	UPDATED Added note about audit entries and role assignments.

Tenant Configuration

Concept: ID Definitions and Sequence Generators	NEW Describes the purpose of ID Definitions and Sequence Generators in Workday.
Reference: Edit Tenant Setup - Financials	UPDATED Added additional information to the Procurement Options section.
Reference: Edit Tenant Setup - Security	UPDATED Updated description for Android devices that support biometrics.
Reference: Edit Tenant Setup - System	UPDATED In the Mobile section, removed the reference to Android 5.0 when previewing documents and attachments.
Steps: Set Up Workday Mobile Applications	UPDATED Updated Android support to version 8.1 and later.

Concept: Mobile Devices and Features	UPDATED Updated Android support to version 8.1 and later.
Concept: Mobile Authentication	UPDATED Updated Android version to 8.1 or later for devices that support biometric authentication.
Steps: Set Up Email Ingestion	UPDATED In Step 2, clarified that creating segment-based security groups is optional. Added Step 4 to activate pending security policy changes. For clarity, moved: • Content from the retired Configure Email Ingestion Settings topic to Step 8 of this topic. • Email Ingestion opt-out instructions from Next Steps to Context.
Set Up Email Ingestion Receiving Domains	UPDATED For clarity, moved: • The DomainKeys Identified Mail signature requirement from Prerequisites to Context. • DNS provider configuration instructions from Steps to Next Steps.
Example: Set Up Forwarding in Gmail for Email Ingestion	UPDATED Moved the example from the Scenario section and added it to the Concept: Forward and Redirect with Email Ingestion topic.
Concept: Forward and Redirect with Email Ingestion	NEW Describes the concept of forwarding and redirecting emails with Email Ingestion. This topic replaces Forward and Redirect Emails for Email Ingestion.
Setup Considerations: Workday Messaging	UPDATED Added a bullet to the Limitations section to clarify that Workday Messaging doesn't support mobile phone numbers with extensions.
Set Up Hubs	UPDATED Updated to highlight that you must log out and log back in to view Hubs changes.

Steps: Import Media	UPDATED In Step 3, added instruction to assign a media owner. In the Next Steps section: • Added the View Media Import Jobs report. • Moved information about the Media Import Job History report here from Step 5.
Create Work Schedule Calendars	UPDATED Added a new step explaining that you can use work schedule calendars for static scheduling in Workday Scheduling.
Steps: Automatically Assign Work Schedule Calendars	NEW How to automatically assign work schedule calendars.
Concept: User Activity Logging	UPDATED Modified the Request Time field description to state that Workday uses the time zone of the person who runs the report to display the time.
Steps: Set Up Customer Central Accounts	UPDATED Clarified: • The required types of Customer Central accounts to create and who creates them. • Naming requirements for Customer Central accounts. • That you don't have to create a Customer Central User account if you've already created a Customer Central Administrator account for yourself.
Create Customer Central Security Administrator Accounts	UPDATED Added guidance on naming the Customer Central Security Administrator Account.
Create Customer Central Administrator Accounts	UPDATED Updated: • Added guidance that a Customer Central User account isn't necessary if you've already created a Customer Central Administrator account for yourself. • Updated guidance for naming the Customer Central Administrator account.
Create Customer Central User Accounts	UPDATED

	• Added guidance that you don't need to create a Customer Central User account if you've already created a Customer Central Administrator account for yourself. • Updated guidance for naming Customer Central User accounts.
Steps: Enable OpenID Connect Authentication with SAML SSO in Customer Central	UPDATED Removed Note about lack of support for setting up multiple sign-in methods. Workday now enables Customer Central Security Administrators to set up multiple sign-in methods for Customer Central.
Concept: Customer Central Users	UPDATED Added a Customer Central Security Model heading to introduce a list of account behaviors in the Customer Central security model.
Concept: Customer Central Account Naming Conventions	UPDATED Updated to include specific naming criteria for each type of Customer Central account.
Create Customer Central Sessions	UPDATED Clarified how long and under what conditions Production tenant sessions remain active.
Configure Object Transporter 2.0 Security Permissions	UPDATED • Moved part of Step 3 to Step 4 and added a table to clarify account permissions in Step 4. • Added Get and Put as required permissions for the OX for Non-implementers domain security policy.
Migrate X.509 Private Key Pairs	NEW How to Migrate X.509 private key pairs between non-Production tenants.
Reference: Best Practices for Migrating Integrations with Object Transporter 2.0	UPDATED Added separate row and best practice information for X.509 private keys.

User Experience

Concept: Inbox	UPDATED

	Added a note explaining that Workday plans to retire Inbox in March 2024.
Concept: My Tasks	UPDATED In the first section, added a limit of 100 saved searches to the saved search bullet.
Steps: Set Up People Experience	UPDATED Updated Step 5 with information about Quick Tasks Enablement on Workday Home.
Concept: Home Page Workspace	UPDATED Added information about Disable Quick Tasks in the Settings section.
Reference: Home Page Cards	UPDATED In the Unapproved Time - Review Time row, added information about using time approval templates.
Example: Create External Home Page Cards Orchestration	NEW Illustrates how to set up an orchestration that displays data on a custom card.
Setup Considerations: Journeys	UPDATED Added a note in the Considerations column under the Security section for the Distribute Journeys task.
Concept: Time Off in Workday Assistant	UPDATED Removed position-based time off plans from the bullet list of what Workday Assistant doesn't support.
Set Up Electronic Signatures	UPDATED Added information to Step 3 to clarify that the Workday anchor text configuration must match the DocuSign configuration. Clarified in the Context section that the Update eSignature Status task won't retrieve signatures for documents distributed using the Create Distribute Documents or Tasks task.
Troubleshooting: eSignature Integrations	UPDATED Added information about how to troubleshoot stalled documents.

Payroll

Company Relationships (USA)

Steps: Set Up a Single Legal Entity	UPDATED Clarified company relationship functionality.

Court Orders (UK)

FAQ: Court Orders (UK)	UPDATED Added a question about finding the number and value of payments made to date.

Earnings, Deductions, and Other Calculations

Map Earnings to Compensation Elements	UPDATED Clarified information on setting up compensation elements for FLSA, for Payroll for the U.S.
FAQ: Net to Gross Ups	NEW Answers frequently asked questions about net to gross up functionality.
Set Up Pay On-Demand Rules	UPDATED Added clarity around when an exempt worker can view the End of Date setting.
Example: Create a Pay On-Demand (Net) Earning (CAN)	UPDATED In steps 4 and 5, clarified earnings functionality.
Setup Considerations: Flexible Payment and Deduction Options	UPDATED Clarified that net pay validation isn't supported for flexible deductions and listed the available workarounds. Moved net pay validation and tracking and recouping arrears information from Recommendations to Limitations.
Setup Considerations: Payroll Processing for the Fair Labor Standards Act (FLSA)	UPDATED In the Recommendation section, added information on: • Processing midperiod pay group changes.

	• Determining eligibility for related calculations.
Setup Considerations: Flat Sum Bonuses (USA)	UPDATED Added a limitation on tax location mapping.

Labor Costing

Concept: Costing Allocations Priority	UPDATED Clarified costing hierarchy functionality for: • Employer-Paid Expense Liabilities (Credits) • Employer-Paid Expenses (Debits)
Create Salary Caps	UPDATED In the Context section, clarified that you must have Workday Payroll to use Salary Caps.

Payroll Commitments

Create Payroll Commitment Rules	UPDATED In the note for Earning, added information about selecting the **Use Weekly Hours** check box for hourly frequencies from the **Maintain Frequencies** task as a best practice.

Payroll Considerations

Setup Considerations: Payroll	UPDATED Added information about Working Time to the Connections and Touchpoints section for Payroll for France.

Payroll Processing

Reverse a Completed Payroll Calculation	UPDATED Added clarification about reversing a pay on-demand result.
Create Manual Payments	UPDATED In step 5, clarified Input Details functionality.

Payroll and Accounting Results

Troubleshooting: Payroll Accounting and Commitment Journals with Errors	UPDATED

	Updated list to clarify that you should use Fix Operational Journals with Errors task for completed payroll commitment and obligations journals. Created separate bullet point for liquidations journals.

Payslips

Define Payslips	UPDATED In the Context section, clarified that retroactively changing completed payroll results might cause incorrect information to display on payslips for Payroll for the U.S and Payroll for Canada. In the Rule Type row in step 5, clarified that you must complete payroll results before the day you have payslips set to display for rule types to apply for Payroll for the U.S.
Concept: Combined Payslips	UPDATED Clarified that for payslips to combine, you must complete a worker's payroll results before the day you have their payslips set to display.

Quarterly Tax Reporting (USA)

Create Codes for Quarterly Tax Reporting (USA)	UPDATED Added these reporting types: • Oregon Replacement Worker • West Virginia Occupational Code
Assign Codes for Quarterly Tax Reporting to Workers (USA)	UPDATED Added these reporting types: • Oregon Replacement Worker • West Virginia Occupational Code

Record of Employment (CAN)

Setup Considerations: Record of Employment (ROE) Reporting	UPDATED In the Use Cases section, added use case for workers with multiple positions.
Steps: Create ROE Data to Report to Service Canada	UPDATED In step 1, clarified rules for workers with multiple positions.

Example: Create an ROE for a Terminated Worker	UPDATED Added ROE information for workers with multiple positions.
Example: Create Multiple ROEs for a Terminated Worker in Multiple Jobs	NEW Demonstrates 1 way to create ROEs for a worker in multiple positions.
FAQ: Processing ROE Data	UPDATED Clarified Workday's functionality when a worker with multiple positions: • Experiences an ROE-triggering event. • Ends a single position.

Retroactive Payroll

Reference: Retro Processing Statuses	UPDATED Added information on Pending Prior Retro status.

Settlement

Steps: Configure Advanced Cash Balance Checking	UPDATED Expanded for better usability by adding: • Detailed information in the Results section. • Standard reports that you can use to view cash balance check exceptions to resettle in a new Next Steps section.
Steps: Set Up Checks and Advices for Printing	UPDATED Added Step 5 for information on positive pay files.
FAQ: Check and Advice Printing	UPDATED Merged all check and advice printing FAQ information into this topic and renamed topic to FAQ: Check and Advice Printing, for clarity.

Tax Setup (USA)

Set Up Union Rates for Paid Family and Medical Leave (USA)	UPDATED In the Context section, removed the bullet list on states you can define union tax rates for.

Setup Considerations: Multi-Jurisdiction Taxation (USA)	UPDATED Expanded the Integrations section to include the Get Payroll Payee Ongoing Work Jurisdiction Tax Election web service.
Concept: State Tax Reciprocity (USA)	UPDATED Migrated content from this topic to Concept: Multistate Withholding Rules (USA).
Concept: Multistate Withholding Rules (USA)	UPDATED Converted topic title from Example to Concept. Clarified the functionality of the View Payroll Multistate Withholding Rules report.
FAQ: Multistate Withholding Rules	NEW Answers frequently asked questions about multistate withholding rules.
Set Up Aggregate Federal Wages (USA)	UPDATED Moved information about completing on-demand additional payments to the Prerequisites section.
Concept: Aggregate Federal Wages (USA)	UPDATED Added an example to provide clarity on how Workday aggregates federal wages to calculate standard tax withholding. Migrated content from Set Up: Aggregate Federal Wages (USA) to this topic.
Reference: Aggregate Federal Wages (USA)	NEW Provides additional information about aggregate federal wages for Payroll for the U.S. Migrated content from Concept: Aggregate Federal Wages (USA) to this topic.

Withholding Orders

Record a Federal Administrative Wage Garnishment Withholding Order (USA)	UPDATED In Step 3, clarified what displays in the Company field.

Worker Tax and Payment Elections

Add Worker State Tax Elections (USA)	UPDATED

	In Step 5, clarified that the Other section only shows up if the selected state has payroll other state tax authorities.

Reporting and Analytics

Benchmarking

Setup Considerations: Workday Benchmarking	UPDATED Removed references to the retired Financial Management benchmarks.
Steps: Set Up Workday Benchmarking	UPDATED Removed references to the retired Financial Management benchmarks.
Opt in to Benchmarking	UPDATED Removed references to the retired Financial Management benchmarks and Compensation Benchmarking.
Concept: Workday Benchmarking	UPDATED Removed references to the retired Financial Management benchmarks.
Concept: Workday Benchmarking Reports	UPDATED Removed references to the retired Financial Management benchmarks.
Reference: Benchmarking Security Domains and Report Data Sources	UPDATED Removed references to the retired Financial Management benchmarks.

Custom Reports and Analytics

Setup Considerations: Custom Reporting	UPDATED Added a row in the Questions to Consider section that describes standard reports.

People Analytics

Steps: Prepare for People Analytics Installation	UPDATED

	In Step 4, renamed filters to population filters.
Steps: Change People Analytics Configuration	UPDATED In the first bullet of the Context section, renamed filter condition to population filter condition.
Steps: Configure a Pipeline in People Analytics	UPDATED In Step 6, renamed Filters to Population Filters.
Configure Pipeline Field Mappings	NEW Changed the definitions of required and recommended fields used in the Field Mapping step.
Reference: Requirements and Considerations for Changing People Analytics Configuration	UPDATED Renamed filter to population filter.
Reference: Metrics in People Analytics	UPDATED Replaced metric details for Headcount Growth Rate.

Prism Analytics

Concept: Table Error File	UPDATED Added information on accessing table errors from the Prism Activities Dashboard.
Concept: Dataset Workspace	UPDATED Updated information on filtering the Example Data.
Concept: Data Catalog	UPDATED • Added the Prism Activities Dashboard and Data Catalog filter. • Updated the Data Catalog Graphic.
Steps: Create a Table by File Upload	UPDATED Added information on accessing Data Change Activities history and downloading table errors from the Prism Activities Dashboard.
Create a Data Change Task	UPDATED

	Added information on accessing Data Change Activities history from the Prism Activities Dashboard.
Create a Data Change Task Schedule	UPDATED Added information on accessing Data Change Activities history from the Prism Activities Dashboard.
Concept: Data Change Tasks	UPDATED Added information on accessing Data Change Activities history from the Prism Activities Dashboard.
Publish a Dataset as a Prism Data Source Manually	UPDATED Added information on accessing Data Change Activities history from the Prism Activities Dashboard.
Create Dataset Publish Schedules	UPDATED Added information on accessing Data Change Activities history from the Prism Activities Dashboard.
Example: Create Dependent Publish Schedules for Datasets	UPDATED Added information on accessing Data Change Activities history from the Prism Activities Dashboard.

Spend Management

Inventory

Count Par Inventory	UPDATED Removed Zero on Hand row from step 3.

Procurement

Steps: Set Up Procurement	UPDATED Added a link to Concept: Procurement Conditional Rules to Step 17.
Concept: Procurement Conditional Rules	NEW Describes the concept of procurement conditional rules in Workday.

Reference: Company Procurement Options	UPDATED Added additional information to about company procurement options.
Steps: Set Up Buyer Hub	UPDATED For clarity, merged and added information about: • Security into Step 1, from the previous Prerequisites section. • User access into the Context section, from the previous Result section. • Reporting into Step 2, from the previous Step 5. • Buyer hub tabs into Step 3, from the previous Step 4.
Concept: Buyer Hub	UPDATED For clarity: • In the first 3 paragraphs, added information about the buyer hub functionality and location. • Renamed the Set Up Buyer Hub section to Customize Buyer Hub and added information about customizing the worklet. • In the Buyer Hub Cards section, added information about configuring cards.
Steps: Set Up Supplier Sanction List Screening	UPDATED Updated to include information about screening healthcare suppliers using the List of Excluded Individuals/Entities from the Office of the Inspector General.
Steps: Schedule Batch Supplier List Screening	UPDATED Updated to include information about screening healthcare suppliers using the List of Excluded Individuals/Entities from the Office of the Inspector General.
Steps: Configure Alternate Item Identifiers	UPDATED
Setup Considerations: Worksheets for Purchase Items	UPDATED Added information about the Mass Cancel Purchase Item Requests task to the Questions to Consider section.
Steps: Integrated Search for Item Management	NEW How to set up and access external item catalogs using purchsae item request templates.

Create Purchase Items	**UPDATED** In Step 6, updated the row for Ordering Start Date and Ordering End Date to provide information about inventory substitute items.
Steps: Set Up Machine Learning for Spend Category Recommendations	**UPDATED** Updated to reflect that you now select business documents on which to enable recommendations using the new Maintain Machine Learning Prompt Recommendations task.
Steps: Maintain Requisition Access to Goods and Services	**UPDATED** Expanded steps 1 and 2b to add information about requesting entities.
Set Up Requisitions Worklet	**UPDATED** Renamed Steps: Set Up Requisitions Worklet to Set Up Requisitions Worklet. For clarity, moved information from FAQ: Requisitions Worklet about: • Requisition lines and unsupported functionality into the Context section. • Enabling the worklet into the Next Steps section.
Create Requisitions in the Requisitions Worklet	**UPDATED** In Step 3, added information about default ordering methods.
Concept: Requisitions Worklet	**UPDATED** For clarity: • Removed the Requisition Cards and Ordering Methods section. • Moved information about custom validations from FAQ: Requisitions Worklet to the last paragraph.
Reference: Requisitions Worklet Ordering Methods	**UPDATED** In the Search Catalog row, expanded the description to include the new Catalog filter.
FAQ: Requisitions Worklet	**UPDATED** For clarity, moved information about: • Requisition lines, unsupported functionality, and enabling the worklet to Set Up Requisitions Worklet. • Custom validations to Concept: Requisitions Worklet.

Create Sourcing Rules for Requisitions	UPDATED Added Workday recommendations to the table in Step 2.
FAQ: Requisition Sourcing	NEW Answers frequently asked questions about requisition sourcing.
Steps: Close Purchase Order Lines for Invoicing or Receiving	UPDATED Expanded Step 1 to provide more information for options on closing purchase order lines.
Steps: Create Purchase Order Acknowledgments	UPDATED Added steps 1 and 4 to provide information about tenant setup and attachment categories. Renamed Create Purchase Order Acknowledgments to Steps: Create Purchase Order Acknowledgments, for clarity.
Reference: Supplier Contract Statuses	NEW Provides additional information on supplier contract statuses.

Strategic Sourcing

Steps: Set Up Strategic Sourcing	UPDATED Removed the Global Settings row from Step 3 and added Step 2 for depth of content.
Create Project Types	UPDATED Added information to the Steps section to clarify the process of creating a project type.
Steps: Add Custom Fields to Contracts and Projects	UPDATED Renamed to include projects, added projects in the Context section.
Concept: Custom Intake Links	UPDATED Moved topic from Pipeline section to Customize Projects and Contracts section.
Hide Fields on Intake and Projects	UPDATED

	Renamed to clarify content and updated Steps 2 and 3 to reflect user interface changes.
Automate Intake	UPDATED Added information about multi-user intake routing in Step 2.
Import Data	UPDATED Retitled, added information about importing commodity codes to the table in Step 3, clarified steps on importing attachments.
Import Contracts with a Contract Hierarchy	NEW How to use the Data Importer template to import contracts with a contract hierarchy.
Steps: Set Up Supplier Connector for Strategic Sourcing	UPDATED Added information to Step 3 about maintaining contact types in Workday.
Steps: Set Up Supplier Contract Connector Integration	UPDATED Added a step about account provisioning.
Concept: Teams Overview	UPDATED Added additional information about team permissions.
Reference: Data Importer Validation Rules	UPDATED Added the Contract Validation Rules section and the Milestones section.
Change Default Language	UPDATED Moved list of languages to Reference: Strategic Sourcing Supported Languages.
Reference: Strategic Sourcing Supported Languages	NEW Provides additional information about the languages supported by Strategic Sourcing, list moved and updated from Change Default Language.
FAQ: Account Security	UPDATED Added the Signing in with a Password section.
Concept: Savings Trackers	UPDATED

	Removed references to gauges and added Overview tab information.
Concept: Project and Contract Status Reasons	NEW Describes the concept of project and contract status reasons in Workday.
Invite Suppliers	UPDATED Added information about using commodity codes to invite suppliers.
Concept: Scorecard Scoring Logic	UPDATED Clarified how Strategic Sourcing applies scoring logic in different sections on a scorecard.
Manage Supplier Segmentation	UPDATED Added information about field configuration in the Context section.
Reference: Supplier Profile Update Emails	NEW Provides additional information about emails suppliers receive when updating their profiles.

Student

Reference: Mobile Student Features	UPDATED Removed Edit My Academic Plan because it's not available on a mobile device.

Academic Advising

Set Up Academic Progress Processing Policies	UPDATED Removed Default Academic Requirement Processing Order from Step 2 and created an optional Step 3. Clarified the Result section by adding information on where to view the new policy. Moved part of the Result section into Next Steps. Clarified the Example content.

Set Up Academic Progress Display	**UPDATED** In the Prerequisites section, added a link and domain security information. In the Context section, removed the items that display and hide by default on the Academic Progress report. Expanded Step 2 by clarifying the effective date. In Step 3, added where you can configure some of the items. Removed the Results section. Added some of the information from the Results section to Next Steps.
Override Academic Requirements	**UPDATED** Expanded the Waive Requirement row in Step 2 with the information that: • The related action to create an override isn't available for academic requirements if there's a waive override, either approved or pending. • The waive requirement override is the only override available for requirements that contain accomplishment and activity eligibility rules.
Concept: Academic Requirements	**UPDATED** Added information about eligibility rule qualifiers to the Unit Requirements section.
Reference: Academic Progress Evaluation Triggers	**UPDATED** Updated the Change Primary Program of Study event row, indicating that Workday updates the business process through the nightly job.
Create Typical Attendance Patterns	**UPDATED** Added a bullet in the Context section about National Student Clearinghouse reporting.

Academic Foundation

Setup Considerations: Multiple Institutions	**UPDATED** Removed the row about naming convetions in the Questions to Consider table. Added information on student records to the Requirements section.

Create Programs of Study	**UPDATED** On Step 6, added the new BP Routing row to describe the business process routing functionality.
Steps: Manage Date Controls	**UPDATED** Added information to Step 2 on how to configure date controls for courses with multiple academic units.
Reference: Date Controls	**UPDATED** Updated description for Actual Enrollment Usage Start.

Financial Aid

Steps: Set Up Student Financial Aid	**UPDATED** • Moved content from Step 15 to the Steps: Set Up Third-Party Access topic for clarity. • Updated the linked topic in Step 11 for consistency with the migration of satisfactory academic progress rule sets to policies.
Reference: Student Nightly Job Orchestration	**UPDATED** Added a new row for Update Activity Registration Records.
Concept: Financial Aid Attendance Plans	**UPDATED** • Expanded the Financial Aid Period Records section to add new content. • Added a new Program of Study and Calendar Changes section. This new content replaces a deleted FAQ topic.
Schedule ISIR Action Item Evaluations	**UPDATED** • Renamed topic, formerly Assign ISIR Action Item Evaluations. • In the Prerequisites section, moved information about ISIR action item delay system user and Action Item Evaluation Delay step to the Context section. • For clarity, expanded the Context section with information about optionally configuring a job schedule with the Action Item Evaluation Delay step.
Reference: Federal Verification Statuses	**UPDATED** Updated description for available federal verification statuses.

Create Student Award Items	**UPDATED** On Step 3, added information on the Need Method row to explain how to manage a Need Impact award on a merit packaging strategy.
Create Disbursement Proration Rules	**UPDATED** On Step 3: • Added a recommendation to the Not Prorated (Full Time) row about when to use the option. • Provided more information on the Projected row about how Workday calculates projected load statuses.
Concept: Disbursement Schedules	**UPDATED** Added workaround information about changes to disbursement schedules after financial aid packaging is completed.
Maintain Satisfactory Academic Progress Policies	**UPDATED** • Removed the Steps: Set Up Satisfactory Academic Progress Policy topic and migrated content to this topic. • Updated Step 1 and Results section to reflect the migration of SAP rule sets to SAP policies. • Removed the Next Steps section because it's no longer needed.
Update SAP Measure Details	**UPDATED** Changed mentions of SAP rule sets to SAP policies for consistency with the migration of rule sets to policies.
Concept: Satisfactory Academic Progress	**UPDATED** Changed mentions of SAP rule sets to SAP policies for consistency with the migration of rule sets to policies.

Recruiting and Admissions

Set Up Student Applicant Types	**UPDATED** Migrated content from the Concept: Set Up Applicant Types topic. Expanded the Context section to provide more clarity on how you can use student applicant types. Removed the: • In Use line from the Steps table. • Result section and added the Next Steps section for clarity.

Setup Considerations: Preliminary Transfer Credit	UPDATED Added web services in the Integrations section.

Student Calculations

Test Student Calculations	UPDATED Added a limitation to the use of Evaluate Student Calculation: • Calculations that evaluate student applicants.

Student Data

Steps: Set Up Third-Party Access	UPDATED Corrected Step 5 to describe the correct profile group. Added Step 8 to describe how to configure dashboards for third parties.

Student Financials

Set Up Charge Item Assignments	UPDATED In the Student Charge Item description of Step 3, added information about course and additional fees.
Steps: Set Up Course Fees	UPDATED Added additional information for clarity to the context section regarding Course and Additional Fees.
Create Payment Precedence Rules	UPDATED In Step 4: • Updated the example in the Order description to add clarity. • Added additional options and examples for the Timeframe Criteria description. • Added information about Refund Recovery charge items in the Title IV Eligible Charges and Charge Type descriptions. • Added a suggestion to the description for Exclusions.
Concept: Due Amounts	UPDATED Reorganized the examples for Emily and Tony for clarity.
Troubleshooting: Student Payments	UPDATED

	Added additional steps needed to resolve the issues in the solution sections.
Create Student Payment Plan Recalculation Schedules	UPDATED Added an example to the Context and Next Steps sections.
Steps: Manage Student Sponsor Contracts	UPDATED In Step 6a, added Process: Billing - Invoicing as additional security domains.
Troubleshooting: Student Refunds	UPDATED Added additional steps needed to resolve the issues in the solution sections.
Steps: Set Up Hold Assignments for Past Due Balances	UPDATED Added a new optional Step 4 for the new Schedule Notification Settings section. Combined the Charge Types and Tolerance Amount per Charge information from the new Step 6 into the new Step 5.
Set Up Registration Soft Drops for Past Due Balances	UPDATED In Step 2, added the new Schedule Active check box and description to enable scheduling of notifications.
Place Students in Collections or Active Bankruptcies	UPDATED Added a new optional Step 5, for adding additional documents to support the collection and bankruptcy updates.
Steps: Remove Students from Collections or Bankruptcies	UPDATED Added a new optional Step 7, for adding additional documents to support the collection and bankruptcy status updates.
Reference: 1098-T Fields and Box Calculations	UPDATED In the Total Payments Calculations section of the Box 1: Payments Received for Qualified Tuition and Related Expenses (QTRE) area, added the Student Payment Adjustments Event business process and clarified the Student Sponsor Contract Disbursements.

Student Records

Setup Considerations: Course Smart Lists	UPDATED

	Added information on granting view access to smart lists to the Security section.
FAQ: Curriculum Management	**UPDATED** To expand on course section rollovers: • Added prerequisites. • Added academic period requirements.
Steps: Set Up Student Registration	**UPDATED** Added Step 4 to provide information on how to grant third-party access to student registrations.
Steps: Set Up Waitlist Policies	**UPDATED** Added Step 3 to include information on how to configure waitlists that expire based on time.
Troubleshooting: Student Can't Register	**UPDATED** Removed row 1 for accuracy. Added row 6 to describe how to resolve registration issues caused by duplicate registrations.
Steps: Set Up Class Standing Policies	**UPDATED** Added information on eligibility rule-based class standing progression to Step 2 and Step 3. Added information on the Mass Refresh Academic Statistics report to Step 4.
Steps: Set Up Academic Standing Policies	**UPDATED** In Step 5, clarified that the Run Post Grading Jobs task must be run.
Create Academic Standing Rule Sets	**UPDATED** In Step 2, clarified that you can't edit rule sets that are in use.
Manage Programs of Study for Students	**UPDATED** Added: • Information to the Prerequisite section to describe a new business process functionality. • Information to the Context section to describe the new functionality to bundle nonstandalone programs of study. • Notes to describe when a program of study can be removed or made primary.

Steps: Set Up Student Grading	UPDATED In Step 5, added information about setting up grade rosters. In Step 6, clarified that students can control which institutional grades their third parties have access to view. Moved content from Step 7 to the Steps: Manage Third-Party Access topic.
Steps: Set Up Grade Rosters	NEW How to set up grade rosters.
Create Grid Configurations for Grade Rosters	NEW How to create grid configurations for grade rosters.
Set Up Policies for Grade Rosters	NEW How to set up policies for grade rosters.
Create Student Grading Schemes	UPDATED On the table in Step 2, added the new Name row to clarify that grading schemes must have unique names. Removed the: • Display Grade Notes to Student row on Step 2. • Next Steps section.
Steps: Manage Student Transcripts	UPDATED For clarity and additional information, added an inline link to the third-party access step.
Steps: Manage Completion Honors and Awards	UPDATED In the Honor/Award row on Step 1, clarified that you can't create duplicate naming conventions on the Create Program Completion Honor or Award task.

Workday Peakon Employee Voice

Administration

Concept: Backdating Employee Segment Data	UPDATED Updated the workarounds in Best Practice section.

Concept: Hierarchical Attributes	UPDATED Added a sentence to the Access section, to explain hierarchy impact on heat maps during live survey rounds.
Example: Add Performance Rating Attributes	NEW Illustrates how to create attributes for employee performance ratings on Workday Peakon Employee Voice.
Concept: Answering Surveys	UPDATED Added a few paragraphs to the Store Interpretation section.
Reference: Survey Configuration Options	UPDATED Added a note to the survey sender row in the table.
Concept: SMS Survey Channel	UPDATED Updated SMS templates.
Create a New Driver Question	UPDATED Added the custom question limit per driver for the Company Questions set. Also added a link to our best practice guide on formulating questions.
Create a New Values Question	UPDATED Added more granularity to the steps.
Create a Driver for Company Questions	UPDATED Removed the steps on creating driver questions, and linked to the relevant topic in Next Steps. Subsequently changed the name of the topic to reflect that the topic solely focuses on how to create a driver for Company Questions.
Add Question Translations	UPDATED Changed the title to be more concise. Rewrote the context section with more depth. Added a sentence in the Result section.
Set Question Targeting	UPDATED Updated topic name and added a sentence at the end of the Context section.
Set Driver Question Frequency	NEW

	Steps on how to set frequency for driver question groups.
Set Open-Ended Question Frequency	NEW Steps on how to set frequency for individual open-ended questions.
Export Questions	NEW New topic on how to export questions from the Administration area.
Enable Questions in the Survey	UPDATED Added more granularity to the Context section. Added an optional step with reference links in the Steps section. Added a sentence in the Result section, and added the Next steps section.
Concept: Driver Questions	UPDATED Added the Question Sets, Drivers, Driver, and Subdriver Questions sections.
Concept: Open-Ended Questions	UPDATED Restructured the entire topic by adding new sections, including Recommendations and Limitations.
Concept: Company Questions	UPDATED Added the Background section, and updated recommendations.
Concept: Values Questions	UPDATED Restructured the topic by moving information into the Background section, and adding a Limitations section.
Concept: Custom Driver Questions Best Practice	UPDATED Changed the title to reflect that this topic relates to driver questions. Added an additional example at the end of the first table.
Concept: Onboarding and Offboarding Questions	UPDATED Added examples to the first 2 paragraphs. Restructured the content by adding a Standard Questions section.
FAQ: Can I Control the Number of Survey Questions?	NEW

	New topic on how the survey determines the number of questions, and what you can do to influence it.
Connect to Workday Using ISU Name and Password	UPDATED Renamed the Authentication Mode selection from Password to Integration System User on Step 5.
Concept: System Requirements	UPDATED Updated supported iOS and Android versions.

Data Analysis

Enable Personal Dashboard	UPDATED Added a table with a consideration note to the steps.
Concept: Personal Dashboard	UPDATED Updated to reflect that the personal dashboard now supports all question sets. Moved the main body of the topic into a table.
Concept: Heat Maps	UPDATED Added 2 paragraphs in the Segment Selection section, to explain hierarchy impact on heat maps during live survey rounds. Created a User Interface section with color scale ranges.
Concept: True Benchmark	UPDATED Clarified how Peakon calculates the Local Office adjustment.