Workday Release Preparation Guide

It's that time of year again. WD2025R1 is almost here!

Whether your organization is preparing for your first Workday release or your tenth, we have put together our best resources, tips, and checklist to ensure you are well-prepared for the release.

What resources will I receive?

As part of our Workday update bundle, your account or service delivery lead (EM, SDM, PA) will provide the following resources:

1. **Feature Manuals**: A curated bundle of resources to help your organization prepare for the Workday release.
   - **Top Features manual**: Contains what our experts deemed the most impactful features that may affect most of our client population. It will help you prepare for and take advantage of this release's new features.
   - **Automatically available features manual**: Learn how to access and benefit from the automatically available features that are built into each module. This manual will guide you through the steps and tips for using the auto-features effectively.
   - **Workday's "Coming Soon" Feature Impact Analysis Manual**: Have earlier access to how some of these features in this release may pose an impact to you.
   - **All Release Features Impact Analysis Manual:** Deep dive into what impacts the features in this release may affect you. This manual will help you understand what features you may need to prepare for.
2. **Webinars**: Learn even more about many of the top features directly from our subject matter experts in live and pre-recorded webinars.

Recommended Release Preparation Timeline

5 weeks	4 weeks	3 weeks	2 weeks	1 week	Release to production	Post release
Release into preview tenant	System and regression testing				Internal approval for release readiness, if required	Implement changes
Distribute preparation guide	Audit report execution				Workday release into production tenant	Opt-in feature review
	Review preparation guide and discuss with Cognizant team	Distribute feature manual to internal SMEs and discuss with Cognizant team	Perform UAT			
	Distribute Feature Manual		Live Webinars	Prepare business communication		

Legend

Workday activities	Client activities
Included Cognizant activities	Optional Cognizant activities

Release Dates

Workday delivers two mandatory releases per year, in March and September. Some features are automatically available while others require additional setup.

Feature release name:	Workday 2025 R1
Start of release preparation window:	February 8, 2025
Feature release delivery:	March 15, 2025

Visit the [Workday feature release schedule] for more information.

Additional Service Offerings

The Cognizant team is ready to help if your organization needs additional support preparing for the upcoming release. Here's an overview of our services.

Release Plus Package

We are continuing to offer three different levels of the Release Plus Packages to further provide you proactive guidance and release process support. Package levels can span from audit report templates, mandatory feature reviews, and testing to accommodate your specific business support needs. **If you would like to proceed with one of the packages, you will need to submit a Salesforce Service Cloud case indicating the specific Release Plus Package option in the title, no later than February 3rd.** Please reach out to your EM/SDM/PA for additional information.

Task	Option 1	Option 2	Option 3	Additional Add-on
Advisory support	✓	✓	✓	
Audit template	✓			
Testing best practice guide	✓	✓	✓	
Cognizant conducted audit		✓	✓	
Weekly status calls		✓	✓	
Consulting on 7 automatically available features across 2 modules		✓	✓	
Regression testing BP's, reports, integrations			✓	
Impact review with heatmap			✓	
Module regression testing				✓
Testing manager				✓
Estimated hours	10	20	40-100	✓

Audit Reports

Run recommended reports against your current release and the upcoming release to compare results. Our team will help your organization understand report findings and assist with resolving exceptions, e.g., Business process exception audit, security exception audit, custom report exception audit. Cognizant has provided an updated checklist below to further assist with the upcoming release and can walk you through with any questions and findings.

Impact Assessment

Determine if there are specific processes that require further impact assessment and receive a like-for-like comparison of the processes pre- and post-release and associated findings.

System and Regression Testing

Test tried-and-true preconfigured test scenarios from previous releases or custom test scenarios to meet your requirements, e.g., Hire, change job, propose/request compensation change. Test management services can also be provided, includes test plan and scenario development and execution.

Release Review

Receive a custom Feature Manual for your organization and a presentation based on your specific requirements, including a workshop with your team to discuss potential impacts of each feature.

Advisory Services

Plan and execute a strategy for rollout of one or more release features. Develop new or update existing training materials, in-system guidance support (guided tours, tenant branding, announcements, etc.), Training, communications, user adoption plan, or other targeted efforts, based on unique needs.

Develop and Implement Changes

Your organization may need configuration changes upon review of new features or changes to existing features. Our team will assist with developing changes to prepare for production after go-live, e.g., custom validations to prohibit users from accessing new features, updating custom reports, security, or business process changes, etc.

These services can be performed by Cognizant as part of your contracted hours or as a separate statement of work as required. A detailed effort estimate will be provided for each. If you have further questions or would like additional support, please reach out to your account or engagement manager.

Customer Feature Release Checklist

Pre-release activities	Comments
Activate all ‘pending’ security changes before upgrading to the next Workday release.	
Run the Business Process Exception Audit (Business Process Administrator).	Resolve any identified critical Business Process exceptions.
Run the Business Process Policy View Audit (Security Administrator).	Resolve any Business Process policy view issues.
Run the Business Process Definitions with Integration Steps using Deprecated Fields Audit (Business Process Administrator).	Resolve any Business Process issues.
Run the Organization Exception Audit (Organization Administrator).	Resolve any identified organization issues.
Run the Security Exception Audit (Security Administrator & Security Configurator).	Resolve any identified critical security exceptions.
Run the Custom Report Exception Audit (Security Administrator & Report Writer).	Resolve any identified critical report exceptions.
Run the All Custom Reports with "Do Not Use" Items (Setup Administrator).	Update invalid report values.
Run the Calculated Field Exception Audit (Security Administrator).	Resolve any identified critical calculated field exceptions.
Run the Condition Rule Exception Audit (Business Process Administrator).	Resolve condition rule exceptions.
Run the Condition Rules using Deprecated Fields (Business Process Administrator).	Update invalid condition rules values.
Run the Unfilled Roles Audit (Business Process Administrator & Organization Administrator).	Resolve any role issues.
Run the Integration Exception Audit.	Review and resolve any issues.
Sandbox preview activities	**Comments**
Review the Coming Soon post on the Community (includes Feature Considerations for the next release).	
Review the Release Notes on the Community once they’re available for the next release.	
Run the Business Process Exception Audit (Business Process Administrator).	Resolve any identified critical Business Process exceptions.
Run the Business Process Policy View Audit (Security Administrator).	Resolve any Business Process policy view issues.
Run the Business Process Definitions with Integration Steps using Deprecated Fields Audit (Business Process Administrator).	Resolve any Business Process issues.
Run the Organization Exception Audit (Organization Administrator).	Resolve any identified organization issues.
Run the Security Exception Audit (Security Administrator & Security Configurator).	Resolve any identified critical security exceptions.
Run the Custom Report Exception Audit (Security Administrator & Report Writer).	Resolve any identified critical report exceptions.
Run the All Custom Reports with "Do Not Use" Items (Setup Administrator).	Update invalid report values.
Run the Calculated Field Exception Audit (Security Administrator).	Resolve any identified critical calculated field exceptions.
Run the Condition Rule Exception Audit (Business Process Administrator).	Resolve condition rule exceptions.
Run the Condition Rules using Deprecated Fields (Business Process Administrator).	Update invalid condition rules values.
Run the Unfilled Roles Audit (Business Process Administrator & Organization Administrator).	Resolve any role issues.
Run the Integration Exception Audit.	Review and resolve any issues.
Post-release activities	**Comments**
If you locked all accounts during the update (best practice), be sure to unlock all user accounts.	Select the ‘unlock user accounts’ option from the Manage User Accounts task.
Activate sessions for Workday Accounts if user sessions were terminated during the update.	Access the ‘Manage Workday Maintenance Window’ task to activate the sessions.
Re-enter any configuration changes that were made in your Sandbox Preview tenant.	
Rerun audits from the first 2 checklists.	Resolve audit issues.
Review the Retired Functionality Reference for the next Workday release when it becomes available.	Make note of any upcoming retirements and corresponding required actions.