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Staying one step ahead.

Planning and considerations for Workday release updates.

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Overview

The Workday ecosystem has proved revolutionary in many ways, replacing numerous legacy systems with a single unified cloud-based application. One of its many strengths is the "one single line of code" that all customers are on. Twice a year, updates with new features are released. While some of these updates are mandatory, others are optional because they require additional configuration and/or setup for the functionality to become active.

The Workday Community provides documentation for each release, plus tools and resources to help successfully navigate each release cycle. Those organizations that plan in advance, have the right resources involved and thoroughly test business processes, reports and integrations, are more likely to have a successful roll out of the new functionality.

In the following pages, you will learn about what to consider when you're planning for an update, resources that are available and how to use the What's New in Workday report.

General new release resources

'How Workday Delivers Features' and review 'Workday's Feature Release Process FAQ' provide important information on how Workday provides new functionality through:

- **Weekly service updates** which occur within the weekend maintenance window and deliver timely fixes and improvements that won't impact end-users.
- **Feature releases** which are delivered on a six-month schedule contain many new features and functionality that may require uptake.

The 'Workday Release Center' is a one-stop shop for all release-related communications, documentation and notices. Located in the 'Release Information' drop-down menu on the Workday Community home page, the center is updated for each release.

Resources include:

- **Welcome to Workday**—highlighting key enhancements and adoption tools
- **Feature release guidebook**—release-planning resources
- **Solution catalog**—best practice tips submitted by community members
- **Product dashboards**—aggregate information for specific features, functions and products
- **Documentation**—the Workday Administrator Guide, Workday's official documentation site
- **Uptaking features in weekly service update**—instructions for the review and uptake of new features
- **Service update notes**—new enhancements by product area
- **Features still in the works**—enhancements soon to be delivered
- **What's New videos**—feature details by product management
- **Customer alerts**—official notifications about verified issues
- **Ideas delivered**—client-submitted ideas that have been incorporated into the release
- **Ideas available in preview**—client-submitted ideas available in preview
- **Trending questions**—frequently asked questions about the current release

In addition to the information provided by Workday, we have developed the following materials to help you plan:

- Base blueprint outlining process, roles and responsibilities
- Base project plan
- Base point-of-view communication
- Base regression test scripts with the potential to be automated

Release project planning and timeline resources

With a Workday update, it's not only important to understand and test all the new functionality, but also assess impacts to current functionality. This can be accomplished with regression testing of current key processes and functionality. Workday provides resources to help build the planning and testing framework needed to ensure a successful release.

The person who is acting as the release manager can benefit from Workday's webinar workgroups which focus on planning, key dates, communications and release manager responsibilities.

Workday's 'Feature Release Guidebook' provides guidance in developing a plan, along with a repeatable process to be executed with the twice-annual updates.

Resources include:

- **Feature release timelines**—provided for production, implementation and sandbox tenants. Customers can preview new features and functionality five weeks before the feature release. Once the preview window is closed, the feature release is delivered to all tenants on the same date.
- **Planning for your release testing**—features a sample high-level project plan for managing the release, including place holders for testing and communication activities.
- **Sandbox preview testing**—includes tips for release testing with suggestions for focusing on key integrations and critical business processes and custom reports.
- **Communicating during testing**—helps you effectively communicate with Workday during new release testing to ensure any issues are handled.

Here are some basic steps to follow for each release:

1. Identify a project manager.
2. Develop a high-level project plan for reviewing functionality, testing pre-release and confirming operations post-release. Confirm the project team participant roles and responsibilities.
3. Review new features and determine how they will be enabled and applied.
   a. **Mandatory features** are those which are automatically applied to the tenant, as well as those that impact existing processes, but may require additional configuration.
   b. **Optional features** are just that. A good time to consider adding new features with no impact on existing processes is after the new release goes live. This gives you time to focus on testing, confirming functionality and assessing impact of mandatory updates pre-go-live.
4. Create or update the test plan for sandbox preview and post-release quality assurance.
5. Complete any configuration and/or integration updates required for mandatory features in the Sandbox Preview tenant.
6. Conduct pre-release testing focused on existing functionality, paying particular attention to critical business processes, integrations and custom reports.
7. Update training materials.
8. Release new features to production tenants.
9. Conduct post-release quality assurance testing.
10. Debrief to identify improvements for the next release. If desired, plan for the deployment of additional optional features.

High-level recommended timeline

We recommend assigning the following roles:

- **Release manager/lead**—responsible for the overall release project, completing the initial impact review and ensuring testing is completed.
  - — A certified partner can also fill this role. This would allow your team to focus on testing and completing a detailed review.
- **Testing manager/lead**—responsible for ensuring that all regression testing is completed.
- **Subject matter experts**—responsible for the detailed review of mandatory features within their area of expertise to ensure all potential impacts are identified. They may also complete regression testing.
- **Communications manager/lead**—responsible for developing communications on the changes to users.

Six weeks out prep for release	**Five weeks out** identify scope	**Three weeks out** configure and test	**One week out** client sign off	**One week post go-live** monitor
Kick off project	Review release notes	Complete required tenant configuration	Complete final testing	
Identify resources	Review impacts of mandatory changes against client-specific tenant configuration	Complete testing and resolve defects and issues	Communicate to users	
	Identify any optional features recommended for later adoption	Update training materials and documentation	Conduct training	
	Review session with client stakeholders			
	Present required tenant updates			
	Confirm regression testing scope			

Understanding Workday product strategy resources

Workday considers input from its customer base and partners to determine what new features to include in releases. Workday Community posts resources that outline the product roadmap and what features are planned or under consideration for a future release. Some of the most commonly referenced resources are:

- **Product strategy roadmap sessions (formerly known as Coffee Breaks)**—are recorded sessions that feature discussions of current thinking on new features in development. They are intended to help customers and partners develop plans for leveraging Workday functionality.
- **Next release overview and future release planning webinars**—provide an overview of what's coming in the next release, along with a vision for the subsequent release. Usually delivered just before a new release, they're more definitive than the product strategy roadmap sessions.

Understanding new features and functionality resources

Workday releases provide new functionality across all product areas. To best leverage functionality, there must be a thorough understanding of what is being provided. We recommend that you focus on mandatory features first with optional features pursued after the release has been in production a few weeks. This ensures a smooth go-live with the new release based upon existing functionality, which has been verified pre-go-live with regression testing.

A successful release cycle is one with no negative impacts to day-to-day business at go-live. Once stable and post-go-live day-to-day operations are confirmed, you can shift to leveraging optional functionality to improve daily activities or make the system even more robust.

Workday Community offers a number of resources to help you understand the functionality being delivered in each release.

'Announcing and Feature Considerations' is a summary Excel workbook with a tab for each product area (e.g., HCM, payroll, etc.). Each product tab lists the sub area (e.g., HCM > benefits or finance > procurement), along with:

- Short name for the feature.
- Benefit of the feature.
- Considerations for taking advantage of this new feature (e.g., where other BPs or security setting may need to be changed).
- The impact this feature may have on deployment (e.g., additional testing or updates to training materials may be required).

'What's New in Workday' is a tenant report to run throughout the release cycle, providing detailed feature information. This is your primary tool for determining which new functionality impacts you, based upon your tenant configuration and functionality usage. It can be downloaded as an Excel workbook and provides the following for each new feature:

- **Feature**—title and recap of feature benefit.
- **Functional area**—areas impacted by this feature change. New functionality in an area you may not use (e.g., Academic Faculty) can generally be omitted from testing.
- **Setup effort**—whether the feature is automatically available or setup is required. This is a key field to monitor because it identifies which features are required for uptake and which are optional. Extra focus should be placed on those that are "Automatically Available."
- **New functionality**—a description of what it does.
- **Training and testing impact**—indicates whether this feature may require additional testing and how it may impact training materials.
- **Business processes**—identifies the business processes affected by the feature changes.
- **Tasks**—identifies the tasks affected.
- **Web services**—identifies the web services affected.
- **Security domains**—identifies the security domains affected.
- **Current name**—the current way the functionality is referenced in Workday.
- **Former name**—how the functionality was referred to in previous Workday releases.
- **Retired**—an indication that this functionality will no longer be available.
- **JIRA number**—the JIRA case number pertaining to the new feature (where applicable).

Because Workday releases new updates weekly, it is a good idea to run the report after each weekly update is completed to ensure that all changes are captured.

'What's New Videos' are presentations focused on a particular product area and sub area (e.g., HCM > absence). They describe the business reason (or brainstorm) behind one or more features, explain the solution and demonstrate the new feature(s).

Workday continues to make enhancements, working towards a goal of one seamless user experience across all platforms—desktop, mobile, device.

The 'User Interface Readiness Guide' explains the changes made to the user interface (UI) in the release. Reviewing these updates helps identify any training materials that need modification. We recommend that any UI updates that impact the user experience should be documented by refreshing screenshots in training materials and/or providing the user community with information about what they can expect. While the guide provides general information, screenshots from your own tenant are more impactful to your users.

Resources for testing

In addition to providing new functionality, a Workday new release may also impact existing functionality. Workday Community provides resources to assist with designing and executing a robust testing plan. This allows you to fully understand the new functionality, assess the impact on current functionality and continue to ensure Workday performs as expected post-release. Each functional area (HCM, benefits, payroll, compensation, etc.) should evaluate potential impacts within their domain and build the test plan accordingly. Also, if you are using Workday Payroll, we recommend a payroll be processed to ensure results are as expected.

Workday recommends that new release testing efforts focus on the following:

- Running and reviewing output from critical integrations before beginning any destructive testing.
- Validating existing system data.
- Testing critical business processes and critical custom reports.

In addition, conduct a payroll run (if you are using Workday Payroll) consisting of the following steps:

- Include any key loads into payroll.
- Run critical outbound integrations after the payroll processing is complete.

When defining test cases, identify test scenarios (e.g., hire an employee), rather than creating step-by-step test scripts. This enables the test plan and test cases to be reused in the future and ensure critical scenarios (e.g., business processes, reports and integrations) function properly, even when the user interface or specific steps to achieve desired results may change. We also advise you review test plans from past implementations or major Workday system initiatives to identify critical or commonly encountered scenarios to include in new release testing.

The 'Customer Update Checklist' contains recommended audits and other steps to complete before, during and after the release.

'Exception Audit Reports' identify problems with specific areas, such as business processes, security settings, calculated fields and integrations. For each problem identified, Workday explains the problem and provides a recommended solution. 'Exception Audit Reports' can help identify and create changes that need to be made to an existing Workday functionality. We recommend you run audits of your current production tenant for a baseline assessment. Audit reports can then be run in your preview tenant and compared to identify new issues resulting from release updates versus pre-existing conditions.

Before you go...

When you follow Workday's suggested release protocols, you'll reap the benefits they've sewn for their customers. However, it must become a part of your organization's standard operating process. Without proper planning, testing and communications, you run the risk of missing out on important new functionality and could experience problems in your live production environment, impacting your daily operations. We are always here to help you plan for each release, and through the power of partnership, you'll be well on your way to prepare your business for future growth and expansion.

To learn more or speak with a expert about your upcoming Workday release contact workday.solutions@alight.com.

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