

# Workday – Docs for Layout Configuration for Compensation Statements

**Rasika Patil**

Email: Rasika.10p@gmail.com

## Abstract

Workday, a leader in enterprise cloud applications, has consistently enhanced its platform to provide comprehensive tools for HR, finance, and business planning. In its continuous drive for innovation, Workday introduced Docs for Layout as an extension to Workday for Docs, an innovative document management solution integrated within Workday's enterprise resource planning (ERP) and human capital management (HCM) systems, a feature designed to revolutionize the way businesses design and manage their documents. This white paper delves into the mechanics of Docs for Layout, differences between Docs for Layout and Workday Docs, Technical challenges, and potential future developments.

## 1. Introduction

### What is “Docs for Layout?”

Docs for Layout is an advanced feature within the Workday ecosystem, enabling users to create structured, visually appealing documents tailored to specific business needs. It combines intuitive design capabilities with Workday's robust data integration, allowing users to design reports, presentations, and other documents seamlessly.

### Key Features

1. **Template-Based Design:** Pre-designed templates provide a head start for creating consistent and professional documents.
2. **Dynamic Data Integration:** Automatically pull in real-time data from Workday's HR, finance, or operations modules into documents.
3. **Drag-and-Drop Interface:** Simplifies document customization with an intuitive, user-friendly editor.
4. **Customizable Layouts:** Allows users to adjust formatting, styles, and data placement to meet unique requirements.
5. **Real-Time Collaboration:** Teams can work simultaneously on the same document, with live updates and version control.

## 2. Are Workday Docs and Docs for layout same:

### 2.1 Workday Docs:

Workday Docs (available from 2021 Release2) enables users to create Document Generation templates, edit templates, insert data fields, and apply conditional rules. In Workday Docs, users can also include tables, images, additional formatting, built-in headers and footers, and preview them as well. Offer Letters and Employee Agreements are the best examples where Workday Docs can be implemented. However, having access to Workday Drive to use Workday Docs is a prerequisite. [1]

The list below shows a few solutions offered by Workday Docs:

#### 1. Centralized Document Repository

- Workday for Docs provides a unified platform for storing, sharing, and managing documents, ensuring all team members access the most up-to-date files.

#### 2. Enhanced Compliance and Security

- Built-in features like access controls, audit trails, and encryption ensure compliance with industry regulations and safeguard sensitive data.

#### 3. Seamless Integration

- Workday for Docs integrates with Workday's ERP and HCM systems, eliminating data silos and enabling seamless information flow across platforms.

#### 4. Workflow Automation

- Automated workflows, such as approvals and notifications, reduce manual effort and accelerate document-related processes.

You can use Workday Docs as part of these HCM business processes:

- Request Reference Letter
- Propose Compensation Hire.
- Offer etc.

My current Organization has used this functionality for generating letters for Off cycle promotions, One-time payments, employee reference letters etc.

### 2.2 Workday Docs for Layouts

Workday Docs for Layouts (available from 2024Release1) is an expansion of Workday Docs and offers an alternative to BIRT (Business Intelligence and Reporting Tools) as a visual editing tool users can use to design, create, and preview document layouts for use with custom advanced reports to generate PDFs in Workday. [2]

Docs for Layout include features to include content (such as text, tables, images, headers, and footers), add new pages, adjust page settings, and preview the layout as users build it. Data fields and Condition rules can also be implemented in Docs for Layout.

Docs for Layouts is an alternative method for creating layouts to that of using Report Designer (BIRT). Users can create and manage document layouts in addition to managing report design files and then choose either a document layout or a report design file as the source of data while configuring business form layout.

To use Docs for Layouts you need to [3]:

- Use an advanced custom report that contains the data you want to include in a document layout.
- Ensure that the report has been enabled for Web Services.
- Be the owner of the report or have had the report shared with you.

Below are the limitations with Docs for Layout:[2][3]

- Currently it supports limited data sources listed in the supported data sources section.
- Only one default font is available for Docs for Layout. The Roboto font is the only available font for editor, preview PDF's and to generate PDF's.
- Java Script is not supported yet and if your niche requirement is to use JavaScript then you must use Report Designer.
- New document layouts need to be created manually as Layouts created with report designers cannot be converted into docs for layout automatically.
- For complex projects, additional tools like BIRT still need to be used.

### **3. Data Sources supported by Docs for Layout:**

Following data sources (functional area wise) are supported by Docs for Layout, Advanced reports can be built on these data sources and used for creating various documents. [4]

- Compensation Review
  - Compensation Review Employee Adjustment for Statements
- Supplier Remittance
  - Payments for Remittance
- Employee Reviews
  - Employee Review Printout
- Talent Cards
  - Talent Review Documents for Talent Card for Review Printing Run

- Workers for Talent Card for Worker Printing Run
- Invoices
  - Customer Invoices for Print Run
  - Customer Invoices for Print Run as of Approval Date
  - Customer Invoice Printing Run Group
  - Dunning Letter Printing Run

#### 4. Configuring Docs for Layout for Compensation:

Below are the steps to configure Docs for layout for Compensation Statements [5]:

1. Create custom report with allowed BO (business Object) only. Here for compensation, must use 'Compensation Review Employee Adjustment for Statements' data source.
2. Use task '**Create Document Layout**' to create a document layout and use above created custom report for data fields to be used in document layout.
3. Edit the document to add text, images, condition rules etc. and then publish the document.
4. Preview the document with the 'Preview' option & using REST Workday XML output file.
5. Use '**Create Business Form Layout**' task to create a business form layout and select same custom report again. At this step, remember to define Expiration Offset since documents get deleted after these offset days.[6]
6. Create Statement rules with task '**Create Compensation Review Statement Rule**' and associates same business form layout.
7. Use task '**Release Compensation Review Statement**' to release statements for all employees.
8. Use task "**Set Compensation Review Statement Visibility**" to set visibility if not already defined employee Visibility in the compensation review template.

Based on each organization's requirements, it is possible to use this new functionality for letters of compensation. For complex and more customized solutions, a report designer, i.e. BIRT could be used for flexibility.

#### 5. Technical Challenges and Workarounds:

1. As of 2024 R2 release, limited Data sources are supported by Docs for Layout as listed in sections above. Also, All the document layouts are based on Advanced reports, and they must be web enabled to be used for document layout. For all web-enabled reports, we need to add group headings as applicable based on data sources in the use. Below is the example of Bonus and Equity compensation statements based on 'Compensation Review Employee Adjustment for Statements' data source.

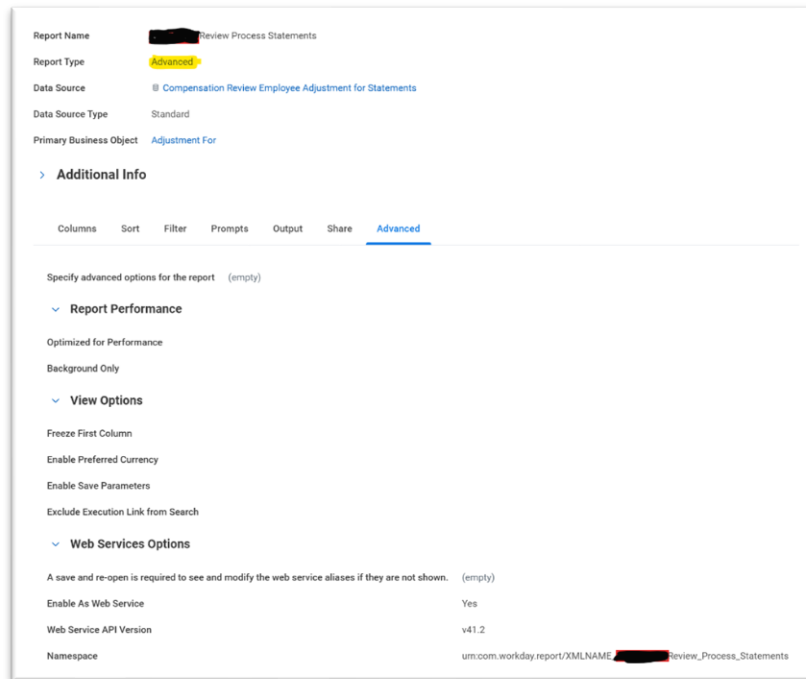


Image 1: Enabling Web Services option.

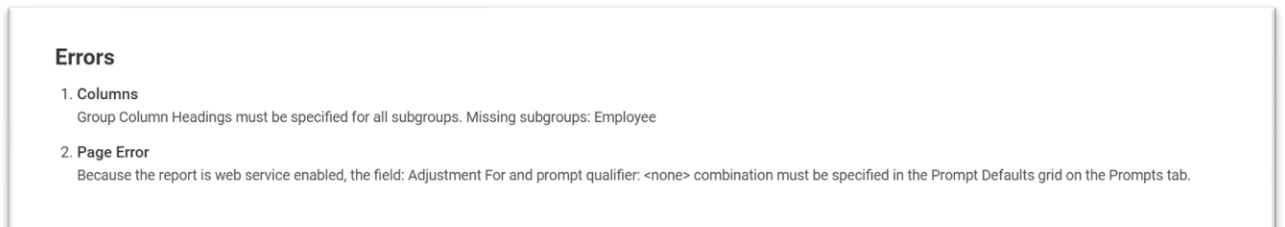


Image 2: Error message for adding Group column heading and prompts.

## 2. Language support [7]

Workday supports below languages in Docs for Layout as of 2024 Release 2.

- Danish (Denmark)
- English (USA)
- English (UK)
- English (Canada)
- French (Canada)
- French (France)
- German (Germany)
- German (Switzerland)
- Japanese (Japan)
- Korean (Korea)

- Polish (Poland)
- Simplified Chinese
- Traditional Chinese.

When we choose an additional Language from ‘Language -> Manage Languages’ menu in the document layout, it adds additional tab at the base of the document layout. Each template needs to be published independently for the changes made and language from base template does not translate to the chosen language template.

For compensation letters, we added German language for Germany based employees. The approach followed was to first develop a base template in English (USA) with all formatting and alignment requirements and replace sentences as appropriate in German language in the additional template to minimize formatting and alignment rework.

3. Though Drag and drop Interface is good, document layout often needs to overcome formatting challenges. For example, for compensation statements configured needed to have a company logo, an image, as a header on the left side and text on the right side of the header. It was challenging to add an image and text in the header as when u click text it was adding below an image and vice versa. This can be overcome by resizing header area to half of the original area followed by adding image and then text. After this, the Header was reverted to normal size.
4. Any unpublished changes do not reflect in the letter or in Preview. All changes carried out need to be published to test.
5. Document layout can be tested only with one test data since xml formatted file needs to be input for generating a preview. To review multiple letters, use task ‘Release compensation Review Statement’.
6. In the content of the documents, adding a URL for any reference needs custom solution since the website link does not show as URL and clickable in the document. The Doc for layout supports text but adding a clickable link is not straightforward. Follow below approach for adding URL’s [Community reference]:
  - a. First create a calculated field of type Text Constant. In this field instead of simple text, add HTML as text. For example, give the HTML text constant:  
“<a href="https://www.yourresourceurl.com">Clickable Text to Display</a>”
  - b. Now, we need to add this calculated field to the source report associated with document layout and add this field to the document layout. When you run a preview, you should see a clickable link.
7. If users modify the custom report as a data source for document layout, then then users must remap the data fields used from report on the document layout. This consumes a significant amount of time if report and approach not well defined at the start.

## 6. Future Potential of Docs for Layout

The introduction of Docs for Layout represents a significant step forward, but its true potential lies in future enhancements. Below listed are a few developmental areas:

- **Extended solutions to move documents from compensation history to maintain worker documents:** The Business form layout (which associates document layout) can be retained for

specified days and the documents get automatically deleted after this expiration Offset. So, for Archival purposes, most organizations use Maintain worker documents functionality to upload compensation reward letters. This can be achieved via EIB. To use EIB, the documentation needs to be encoded to base-64 encode and then populate the base-64 value in the EIB input file. Additionally, excel has 32,767 characters limitations. Due to these limitations, the only viable option as of now most organizations use is using Report designer i.e. BIRT based integrations for moving the documents to maintain worker documents. [8]

- **AI driven Language Translation and support:** As of now, the Languages supported are limited. Also, for each language a separate document layout gets copied from base language and users need to customize each language instance by manually replacing the original content with translated text. This limitation can be solved with AI driven language translation and related support.
- **AI-Driven Enhancements and features:** With AI boom in the technological world, it would be beneficial to have Docs for Layout Integration with Workday's AI capabilities for predictive text, content recommendation and Automated Layout Suggestions etc.
- **Extending solution beyond Workday space:** Extending capabilities of the solution by addressing Compatibility limitations with third-party design tools would benefit for longer customer base. Also extending solutions in the cloud storage platforms would enhance customer experience as well.
- **Enhanced Analytics:** Delivering Built-in analytics to measure document performance and user engagement would be a great addition in the features.

## 7. Conclusion

Docs for Layout is a transformative feature that significantly enhances Workday's value proposition. While the implementation process requires careful planning, the long-term benefits of automation, compliance, and operational efficiency make it an indispensable tool for modern organizations. By aligning the implementation of Docs for Layout with strategic business goals, organizations can significantly improve their document management processes and overall operational efficiency.

As the functionality evolves, organizations can expect even greater integration, usability, and innovation, cementing Workday's position as a leader in enterprise solutions.

## References

1. Workday Community, [June 2023], Concept: Managing Docs Templates, <https://doc.workday.com/admin-guide/en-us/manage-workday/tenant-configuration/content-management/docs-for-business-processes/aaa1587011146593.html>
2. Workday Community, [June 2023], Concept: Docs for Layouts, <https://doc.workday.com/user-guide/en-us/workday-docs-for-layouts/concept--docs-for-layouts.html>
3. Workday Community, [August 2024], Create and Publish Documents Layouts in Docs for Layouts, <https://doc.workday.com/user-guide/en-us/workday-docs-for-layouts/mvj1665271352037.html>  
<https://doc.workday.com/user-guide/en-us/workday-docs-for-layouts/mvj1665271352037.html>

4. Workday Community, [August 2024], Reference: Supported Data Sources in Docs for Layouts, <https://doc.workday.com/user-guide/en-us/workday-docs-for-layouts/reference--supported-data-sources-in-docs-for-layo.html?toc=9>
5. Workday Community, [July 2023], Concept: Workflow for Printing Compensation Review Statements Using Docs for Layouts, <https://doc.workday.com/user-guide/en-us/workday-docs-for-layouts/concept--workflow-for-compensation-review-statemen.html?toc=8>
6. Workday Community, [June 2023], Upload a Business Form Layout and Attach It to a Custom Report, <https://doc.workday.com/admin-guide/en-us/reporting-and-analytics/custom-reports-and-analytics/business-form-layouts/create-business-form-layouts-with-report-designer-/dan1370796667380.html?toc=1.22.0.3>
7. Workday Community, [August 2024], Concept: Language Instances for Translated Document Layouts, <https://doc.workday.com/user-guide/en-us/workday-docs-for-layouts/sty1682707328301.html?toc=6>
8. Workday Community, [May 2024], Concept: Put Worker Document EIB, <https://doc.workday.com/admin-guide/en-us/integrations/enterprise-interface-builder-eib-/inbound-eib-template-guidelines-and-troubleshootin/staffing-eibs/cvr1674225253044.html>