

Release Notes

Product Summary

July 23, 2026



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Releases

Release Notes

Learn about the latest features and releases.

2026R1 Release Notes

2026R1 Service Pack Release Notes

2026-07-03

- [Org Design and Scenario Modeling](#): We update the Changes field to document the icicle chart and span of control coloring on the **Org Structure** tab, updated span of control category labels on the **Span of Control Distribution** chart, and org change details on the **Summary** tab.
- [Org Design and Scenario Modeling: Reporting](#): We deliver a new feature.
- [Org Design and Scenario Modeling: Custom Organization Hierarchies](#): We deliver a new feature.

Release: 2026-06-12

[Access Rules on Data Entry Columns in Modeled Sheets](#): We correct this note to clarify the syntax in the What Do I Need to Do? section.

Release: 2026-05-29

[Org Design and Scenario Modeling: Headcount Reduction and Redeployment](#) : We deliver a new feature.

Release: 2026-05-15

[Advanced Workflows](#): We deliver a new feature.

Release: 2026-05-08

[Configurable Workflows](#): We correct this note to clarify the Business Benefits and Changes sections.

Release: 2026-05-01

- [Org Design and Scenario Modeling](#): We update the Business Benefits and Changes fields to document new charts and capabilities on the Analytics view.
- [Configurable Workflows](#): We update the video on this release note.

Release: 2026-04-10

- [Workday-Enabled Adaptive Planning Customers and Singapore Support](#): We update the Planning Agent release note to add information for Workday-enabled Adaptive Planning customers. We also update the feature description to add support for Singapore.
- [Matrix Reports with Text Rollup](#): We deliver this feature to production.
- [Improved Performance for Actuals Updates](#) : We deliver this feature to production.
- [Accounts with a Level/Dimension Rollup of Text](#) : We deliver this feature to production.
- [Org Design and Scenario Modeling](#): We correct this note to clarify the Org Models and Scenarios Dashboard subsection of the Changes section.
- [Configurable Workflows](#): We update the feature description, Business Benefits field, and Changes field to document the new hierarchy submit task type. We update the Changes field to document the

ability to send reminders to assignees who haven't completed their tasks. We update the Business Benefits and Changes fields to document the new Workflow Path modal.

- [Support for Workday-Enabled Adaptive Planning Instances](#): We update the Adaptive Planning Notifications release note to add a change log for a feature update.

Release: 2026-03-27

- [Calculation Error Messages](#) : We deliver a new feature. We omitted this release note from the 2026R1 preview and production update.
- [Prerequisite Step for MS Teams Integration](#): We add a missing prerequisite step for integrating Adaptive Planning notifications with Microsoft Teams.
- [Org Design and Scenario Modeling](#): We correct this note to clarify the What Do I Need to Do? section and add a link to Related Information section.

Release: 2026-03-14

- [Multi-Select Levels and Dimensions on Modeled Sheets](#): We update the delivery dates for the Production delivery for this functionality from 2026-03-14 to 2026-03-27.
- [Configurable Workflows](#): We update the delivery dates for the Production delivery for this functionality from 2026-03-14 to 2026-05-08.

Release: 2026-02-27

[Org Design and Scenario Modeling](#): We update the Changes field to document new warning toast messages when you exceed Layers and Span of Control guidelines. We update the Changes field to document a new loading indicator for your cursor after you click on a related actions menu.

Configurable Workflows

Preview Date: 2026-02-07. Production Date: 2026-05-08.

With this release, we introduce Configurable Workflows, a new framework that enables you to design, orchestrate, and execute planning cycles. You can now create reusable workflow definitions using a graphical builder, assign tasks dynamically to users, user groups or associations, and manage the entire lifecycle within Hubs. You can use hierarchy submit tasks for seamless bottom-up hierarchical routing, advanced participating level selection, and aggregated monitoring. This feature replaces the legacy Workflow and Process Tracker.

Watch the video: 6m 59s

Business Benefits

This feature enables you to have:

- Enhanced flexibility. You can now design workflows that match your unique organizational structure, supporting both bottom-up planning motions.
- Improved governance. You can now enforce strict data locking upon submission to ensure data integrity during planning cycles.
- Increased process efficiency. You can now automate task handoffs, notifications, submission routing, and hierarchical roll-up submissions, reducing administrative overhead.
- Streamlined communication. You can now send targeted, consolidated reminders to users with pending tasks to keep your planning cycles on schedule without overwhelming their inboxes.
- Granular control. You can now utilize sheet scoping to limit tasks to specific data slices, ensuring users only focus on relevant accounts and levels.
- Improved visibility. You can now gain immediate insight into your planning progress with detailed monitoring and enterprise tree views, helping you identify and resolve bottlenecks quickly.

Changes

Workflow Administration and Definitions

We add a new **Workflow Definitions** page in a new **Workflows** section in your hubs, where you can now create workflow definitions that you use as reusable templates for your planning cycles. You can create definitions with these task types:

- To-Do.
- Hierarchy Submit.

When you create a new workflow definition on the **Workflow Definitions** page, we provide a graphical workflow definition builder that supports drag-and-drop actions, enabling you to:

- Move to-do and hierarchy submit tasks.
- Reorder tasks.

When you create to-do tasks on your workflow definition, you can configure task destinations and direct users to specific dashboards or sheets to complete their work.

When you create submit tasks, you can additionally also configure sheet scope to define specific modeled or cube sheets applicable to a task. We now automatically lock only these sheets for specific roles when assignees submit.

When you launch or edit a workflow, you can now use a multiselect enterprise tree to choose participating levels for hierarchy submit tasks. We add an **Auto-select and maintain valid descendants for selected levels** check box that automatically includes child levels as associations change throughout the workflow.

When you publish workflow definitions, we:

- Enable you to use those workflow definitions to launch workflows for specific plan versions and participating levels.
- Automatically lock the workflow definitions for major structure changes while active workflows exist.

Workflow Management

We add a new **Workflows** page in the **Workflows** section in your hubs, where you can monitor your workflows using a flat-list view of all workflows, their statuses, and progress. You can use this page to:

- Drill down into specific instances to view task-level details.
- Export workflow task history and participating levels to Excel for audit and detailed review.
- View a hierarchical enterprise tree and grid view of your workflow. This view includes aggregated progress counts (such as *In Progress*, *Submitted*, and *Sent Back*) and allows you to search by level or filter by assignee and status.
- Send a reminder to assignees who have not yet completed their assigned to-do, submit, approve, or hierarchy submit tasks. We only display this option for in progress tasks.
- Pause, resume, and archive workflow instances to manage the planning cycle lifecycle.

End User Experience

We add a new **My Tasks** section in your hubs which you can use as a central inbox to:

- View and access your assigned to-do and hierarchy submit tasks.
- Take action directly on task destinations, which we surface in the task. Example: You set your Expenses sheet as a to-do task destination, and your assignee can view and take action on the Expenses sheet directly from the task.
- Submit, submit all levels, or send back on your tasks.

When you send a task back, we automatically:

- Unlock the data for that specific part of the level and organization hierarchy.
- Notify the original submitter.
- Reset the task status back to *In Progress*.

For hierarchy submit tasks, parent-level submitters can choose to send back a specific leaf level only, or a parent level along with all of its descendants, using the *Parent Level Only* or *Parent Level and All Descendants* options.

We automatically send notifications:

- To leaf-level assignees upon workflow launch.
- To parental-level assignees once all their child levels are submitted.

We also consolidate send-back notifications by assignee.

Security and Setup

We add a new **Enable Configurable Workflows** check box on the **General Setup** page in **Administration**. When you enable this feature, we disable the legacy Workflow and Process Tracker features.

We add a new *Manage Workflows* permission. This permission is required to create definitions, launch, and monitor workflows.

We now support associations as assignees for tasks, allowing workflows to dynamically route based on level assignment.

What Do I Need to Do?

1. Select the **Enable Configurable Workflows** check box on the **General Setup** page in **Administration** and save. Note: When you enable this feature, we disable the legacy Workflow and Process Tracker features.
2. Assign the *Access Hubs*, *Edit Hubs*, and *Manage Workflows* permissions to the security groups or users who will administer planning cycles.
3. Configure the associations you want to use as assignees for submit and approve tasks. Go to **Administration > Associations** to define the relationships between users and levels that will drive task routing. Example: Create an association for budget submitters for level Product Development.
4. Create a new hub to house your workflow definitions or use an existing hub. Example: Create a Financial Planning hub.
5. Ensure that all workflow participants have access to this hub and all the artifacts in the hub.

What Happens if I do Nothing?

If you don't select the **Enable Configurable Workflows** check box and save, your tenant will continue to use the legacy Workflow and Process Tracker features. However, we recommend planning your migration as this new framework provides enhanced capabilities and will be the standard for future updates.

Test Scenarios

When you use Ask Workday to ask questions about configurable workflows, the links to configurable workflows topics in the **Source Links** section won't work until we deliver this feature to Production.

Related Information

[Steps: Set Up Configurable Workflows](#)

Change Log

Configurable Workflows

We correct this note to clarify the Business Benefits and Changes sections.

Video

We update the video on this release note.

Hierarchy Submit Tasks

We update the feature description, Business Benefits field, and Changes field to document the new hierarchy submit task type.

Preview Date: 2026-04-10. Production Date: 2026-05-08.

Send Reminders to Task Assignees

We update the Changes field to document the ability to send reminders to assignees who haven't completed their tasks.

Preview Date: 2026-04-10. Production Date: 2026-05-08.

Workflow Path Modal

We update the Business Benefits and Changes fields to document the new Workflow Path modal.

Preview Date: 2026-04-10. Production Date: 2026-05-08.

Configurable Workflows

We update the delivery dates for the Production delivery for this functionality from 2026-03-14 to 2026-05-08.

Advanced Workflows

Preview Date: 2026-02-07. Production Date: 2026-05-08.

With this release, we introduce Advanced Workflows, a new framework that builds off of the existing Configurable Workflows framework which enables you to design, orchestrate, and execute planning cycles. When you create your reusable workflow definitions, you can now also use submit and approve tasks, which include the flexibility to place a submitter and corresponding approver at any level of the organizational hierarchy. This framework also supports multiple approver tasks for a given submission, ensuring that configuration, notifications, and monitoring remain consistent across complex approval chains. Configurable Workflows and Advanced Workflows replace the legacy Workflow and Process Tracker.

Note: Advanced Workflows is only available under certain Adaptive Planning SKUs.

Business Benefits

This feature enables you to have:

- Enhanced flexibility. You can now design workflows that match your unique organizational structure, supporting both bottom-up and top-down planning motions.
- Improved governance. You can now enforce strict data locking upon submission and approval to ensure data integrity during planning cycles.
- Increased process efficiency. You can now automate task handoffs, notifications, and submission routing, reducing administrative overhead.
- Granular control. You can now utilize sheet scoping to limit tasks to specific data slices, ensuring users only focus on relevant accounts and levels.
- Improved visibility. You can now gain immediate insight into your planning progress with detailed monitoring and audit logs, helping you identify and resolve bottlenecks quickly.

Changes

Workflow Administration and Definitions

On the **Workflow Definitions** page of the **Workflows** section in your hubs, we add these new task types that you can use when you create definitions:

- Submit.
- Approve.

You can create definitions with the new task types together with these existing task types:

- To-do.
- Hierarchy submit.

When you create a new workflow definition on the **Workflow Definitions** page, you can now use the existing graphical workflow definition builder to also move tasks within submit and approve task groups.

When you create submit and approve task groups, you can additionally also configure sheet scope to define specific modeled or cube sheets applicable to a task. We now automatically lock only these sheets for specific roles when assignees submit. If you don't select a sheet, we automatically lock all sheets.

When you launch or edit a workflow, you can now use a multiselect enterprise tree to choose participating levels for submit and approve task groups. We automatically select valid levels; you can change the selected levels.

Workflow Management

You can now use the **Workflows** page in the **Workflows** section in your hubs to monitor your workflows with submit and approve task groups using a flat-list view of all workflows, their statuses, and progress. When your workflow uses submit and approve task groups, you can now use this page to:

- Drill down into specific active workflows to view submit and approve task-level details.
- Export workflow task history and participating levels to Excel for audit and detailed review.
- View a flat tree and grid view of your workflow with submit tasks. This view includes aggregated progress counts (such as *In Progress*, *Submitted*, and *Not Ready*) and allows you to search by level or filter by assignee and status.
- View a flat tree and grid view of your workflow with approve tasks. This view includes aggregated progress counts (such as *Pending Approval*, *Approved*, *Not Ready*, and *Sent Back*) and allows you to search by level or filter by assignee and status.
- Send a reminder to assignees who have not yet completed their assigned submit and approve tasks. We only display this option for *In Progress* tasks.

End User Experience

When you're assigned a submit or approve task group, you can now use the **My Tasks** section in your hubs as a central inbox to:

- View and access your assigned tasks.
- Take action directly on task destinations, which we surface in the task. Example: You set your **Expenses** sheet as a submit task destination, and your assignee can view and take action on the **Expenses** sheet directly from the task.
- **Submit**, **Submit All Levels**, **Send Back**, **Approve**, or **Approve All** on your tasks.

We include a **Workflow Path** modal for submit and approve tasks, enabling you to audit previous submissions, read notes, and understand why a task was sent back. The modal displays a chronological table (oldest to newest) of all completed actions for the selected level.

When you send a submit or approve task back, we automatically:

- Unlock the data for that specific part of the level and organization hierarchy.
- Notify the original submitter.
- Reset the task status back to *In Progress*.

In addition to the existing notifications for Configurable Workflows, we now automatically send notifications:

- To submitters when the task is triggered, so they can take action.
- To approvers upon submission for submit and approve task groups.
- To approvers of approvers upon a lower-level approval for submit and approve task groups.

We continue to consolidate send-back notifications by assignee where possible.

Security and Setup

We require you to select the existing **Enable Configurable Workflows** check box on the **General Setup** page in **Administration** so that you can use Advanced Workflows. When you enable Configurable Workflows, we disable the legacy Workflow and Process Tracker features.

What Do I Need to Do?

After you purchase the applicable SKUs to access Advanced Workflows, complete these prerequisite and configuration steps. You don't need to complete these steps if you already completed them for Configurable Workflows.

1. Select the **Enable Configurable Workflows** check box on the **General Setup** page in **Administration** and save. Note: When you enable this feature, we disable the legacy Workflow and Process Tracker features.
2. Assign the *Access Hubs*, *Edit Hubs*, and *Manage Workflows* permissions to the security groups or users who will administer planning cycles.
3. Configure the associations you want to use as assignees for submit and approve tasks. Go to **Administration > Associations** to define the relationships between users and levels that will drive task routing. Example: Create an association for budget submitters for level Product Development.
4. Create a new hub to house your workflow definitions or use an existing hub. Example: Create a Financial Planning hub.
5. Ensure that all workflow participants have access to this hub and all the artifacts in the hub.

What Happens if I do Nothing?

If you don't select the **Enable Configurable Workflows** check box and save, your tenant will continue to use the legacy Workflow and Process Tracker features. However, we recommend planning your migration as this new framework provides enhanced capabilities and will be the standard for future updates.

Test Scenarios

When you use Ask Workday to ask questions about configurable workflows, the links to configurable workflows topics in the **Source Links** section won't work until we deliver this feature to Production.

Multi-Select Levels and Dimensions on Modeled Sheets

Preview Date: 2026-02-07. Production Date: 2026-03-27.

With this release, we enable end users to select multiple levels and dimensions within a dashboard filter to view an aggregation of data on modeled sheets. Previously, users were limited to viewing 1 level at a time or selecting a high-level parent and scrolling through irrelevant data.

Business Benefits

- Users can quickly slice and dice data across multiple levels and dimensions without manual input, significantly speeding up the discovery of insights.
- The ability to select multiple specific dimensions provides greater control over the data displayed, allowing users to tailor dashboards to their exact analytical needs rather than relying on pre-defined views.
- The improved user experience aligns the behavior of modeled sheets with dashboard graphs, which already support multi-select, providing a consistent and intuitive interface.

Changes

We now enable you to select multiple values in the dashboard filter for:

- Dimensions.
- Unlocked levels.

When you select multiple unlocked levels in the filter, we now automatically display:

- A Level column on the left side of the sheet to indicate which level a row belongs to.
- A toast to visually indicate that you selected multiple levels.

When you select 1 or more unlocked leaf levels, we now enable you to edit those rows.

When you include a roll-up level in your multi-selection, we respect the **Allow editing while viewing rollup levels** setting in your modeled sheet properties. When you include a roll-up level and leaf level together in your multi-selection, we automatically unlock your sheet regardless of this setting.

When you add a new row after selecting multiple values in the filter, we now automatically select the first level within the filter as your default level.

What Do I Need to Do?

To enable your users to edit at roll-up levels, enable the **Allow editing while viewing rollup levels** setting in your modeled sheet properties.

What Happens if I do Nothing?

If you do nothing, your dashboards will continue to function as they do today. Users can continue to select single levels or dimensions. The multi-select capability will be available whenever they choose to use it.

Change Log

Multi-Select Levels and Dimensions on Modeled Sheets

We update the delivery dates for the Production delivery for this functionality from 2026-03-14 to 2026-03-27.

Access Rules on Data Entry Columns in Modeled Sheets

Preview Date: 2026-02-07. Production Date: 2026-03-14.

With this release, we enable you to use access rules to secure data entry columns in modeled sheets. You can now control user access so that planners with access to different information only see their information, all while working on the same modeled sheet.

Watch the video: 2m 09s

Business Benefits

This provides:

- Improved ability to safeguard confidential information by enabling you to secure sensitive data within the same modeled sheet, eliminating the need for separate, duplicate sheets for different user groups. This helps to ensure compliance with data privacy standards.
- Improved data management efficiency by consolidating workforce planning into 1 modeled sheet, reducing complexities associated with integrations and ensuring that data is up-to-date.
- Streamlined workforce planning by enabling planners to collaborate on the same modeled sheet while only seeing data relevant to their roles, improving efficiency and data accuracy.
- Enhanced system performance by reducing reliance on initial balance columns as workarounds for noninitial balance data.

Changes

Access Rules Setup

On the **Access Rules** page of the **Administration** area, we add a new **Manage Sheet Columns** button on the toolbar that enables you to search for and make these column types available for use in access rules:

- Check box.

- Date.
- Number.
- Text.

When you secure at least 1 modeled sheet column, we now display an info icon next to the **Account** column header in these areas:

- **Access Rules** overview page.
- Import and export files.

When you hover over this icon, we display a tooltip informing you that the columns are included in the **Account** section of access rules.

We update the access rules export file to include rules for modeled sheet data entry columns under the **Account** column structure.

Access Rules Impact on End Users

When you secure modeled sheet columns and users don't have access to those columns, we now hide the columns when they:

- View the sheet.
- Access the **Display Options** menu of the sheet and search for columns to filter or hide.

We now prevent users from editing secured modeled sheet columns when they have either:

- Limited View permission in the access rule.
- Full View without Edits permission in the access rule.

We recommend that you avoid creating critical validation rules that reference secured columns. If users don't have access to a required column, they can add new rows but won't be able to save them since they can't complete the required column.

XML and JSON APIs

We update these XML and JSON APIs to respect the access rule permissions configured for secured modeled sheet columns:

- importConfigurableModelData
- exportConfigurableModelData

What Do I Need to Do?

To secure data entry columns in a modeled sheet:

1. Go to **Administration > Access Rules**.
2. Select **Manage** on the toolbar.
3. Ensure **Account** is selected. Account must be enabled for use in access rules to secure sheet columns.
4. Select **Manage Sheet Columns** on the toolbar.
5. In the dialog, select the sheet and the specific columns (Number, Date, Text, or Check box) you want to secure, then select **Save**.
6. Update your access rules by importing a rules file. You define access to these columns using the account (Grant) or account (Grant All Except) columns, using the syntax SheetCode.ColumnCode (Example: Personnel.Bonus).

What Happens if I do Nothing?

If you don't explicitly select columns to secure using the **Manage Sheet Columns** settings, all users with access to the modeled sheet will continue to see all data entry columns, consistent with previous behavior. Your existing access rules won't be impacted.

Test Scenarios

If you use this feature with the headcount planning feature, ensure that you align your users' HCM security access with their Adaptive Planning level access. If a user has higher level access in HCM than Adaptive Planning, they can still create or move positions to levels they don't have access to in your access rules. Example: Your workforce planner has HCM access to levels 2100 and 2500.1, but in your access rules they can only access 2100.1. They can still use the headcount planning feature to create or move positions to 2100.2.

Examples

These examples describe some existing access rule setups, actions you take, and behavior to expect. We recommend that you review your existing access rules and identify if your access rules match these examples.

This example describes the most common expected scenario that results in behavior changes:

- Existing Setup: Grant All on specific accounts, where 1 or more account is from Sheet A
- Action: Secure column for Sheet A.
- Behavior: That user will no longer have access to the secured column for Sheet A because access to that secured column wasn't explicitly specified in their access rules.

These examples describe the most common expected scenarios that don't result in behavior changes:

Example 1:

- Existing Setup: Grant and Grant All Except is blank for Account, meaning users have access to all accounts.
- Action: Secure column for Sheet A.
- Behavior: Users will continue having access to all accounts, which now includes the secured column.

Example 2:

- Existing Setup: Grant All on Account includes Sheet Name A, meaning users have access to All Accounts for Sheet A.
- Action: Secure column for Sheet A.
- Behavior: Users will continue having access to all accounts in Sheet A, which now includes the secured column.

Example 3:

- Existing Setup: Grant All Except on Account includes Sheet A, meaning users have access to all accounts except for in Sheet A.
- Action: Secure column for Sheet A.
- Behavior: Users will continue to not have access to accounts in Sheet A, which now includes the secured column.

Change Log

Access Rules on Data Entry Columns in Modeled Sheets

We correct this note to clarify the syntax in the What Do I Need to Do? section.

Predictive Forecaster Scalability and Usability

Preview Date: 2026-02-07. Production Date: 2026-03-14.

With this release, we enhance the scalability and usability of Predictive Forecaster. We increase the system guardrails to support larger datasets, specifically distinguishing between forecast data and lever sheet data, and improve the user experience by providing detailed usage statistics for lever sheets.

Business Benefits

These enhancements enable you to:

- Scale your planning. Process significantly larger datasets and manage more forecast definitions within a single instance.
- Gain visibility. Understand exactly how your drivers impact your forecast with new lever sheet usage statistics on the history page.

Changes

Scalability and Performance

We increase the cell count guardrail to support larger planning models for:

- Forecast data. You can now process up to 10 million cells of forecast data.
- Lever sheet data. We now support a separate limit of up to 1 million cells specifically for lever sheet data.

We increase the default maximum number of forecasts per instance from 20 to 100. Instances currently set below 100 will be upgraded automatically.

User Experience and Error Handling

We add a new **Lever Sheet Summary** section to the **Forecast History** page that displays lever sheet usage statistics. This summary lists information on matching and non-matching regressor rows to help you verify if your lever sheets are being applied as expected.

When a forecast fails due to data issues, we now display the specific intersection information (account, level, and dimension) in the error message, enabling faster troubleshooting.

What Do I Need to Do?

You don't need to take any action to enable these features. The increase in forecast limits and cell counts will apply automatically.

What Happens if I do Nothing?

If you do nothing, you will automatically receive the increased limits and performance improvements. Your existing forecasts will continue to run as expected.

Change Log

Predictive Forecaster Scalability and Usability

We correct this note to clarify the Changes.

Preview Date: 2026-02-07. Production Date: 2026-03-14.

Related Information

[Create Machine Learning Forecasts](#)

Anomaly Detection for Sheets in Dashboards

Preview Date: 2026-02-07. Production Date: 2026-03-14.

With this release, we continue to make improvements to intelligent planning by enabling you to use anomaly detection on sheets in dashboards. This enables you to analyze comparisons between machine learning predictions and your plans and budgets.

Business Benefits

This feature gives you greater visibility on possible outliers and unexpected data by enabling you to detect anomalies on sheets directly in the dashboards that provide more information and context.

You no longer have to navigate away from your dashboard to the Sheets menu to detect anomalies in your sheets, saving you time and effort.

Changes

We add a new *Show Anomalies* option on the Sheet Menu of sheets in dashboards, enabling you to use the existing anomaly detection functionality on sheets in dashboards.

What Do I Need to Do?

1. Have at least 24 months of actuals data in an account for anomaly detection to work for that account.
2. Create prediction versions for anomaly detection.
3. Generate anomaly detection predictions.

What Happens if I do Nothing?

If you do nothing and you already set up and use anomaly detection on the dashboard sheets when you access those sheets from the Sheets menu, we automatically display the new *Show Anomalies* menu option.

Related Information

[Create Prediction Versions for Anomaly Detection](#)

[Generate Anomaly Detection Predictions](#)

[Detect Anomalies in Sheets](#)

New Workday Adaptive Planning Logos

Preview Date: 2026-02-07. Production Date: 2026-02-07.

With this release, we update the Workday Adaptive Planning logos that display in your platform.

Business Benefits

These new logos provide an updated look and feel, and aligns with the design used in other Workday products.

Changes

On the sign-in page for Workday Adaptive Planning, we:

-
- Change the background color of the right-hand side of the page.
- Change the text color of "Workday Adaptive Planning."
- Remove the cloud image.
- Replace the logo.

We also replace the logo and update the colors on:

- Data Agent Service Manager.
- Excel Interface for Planning.
- The footer on the welcome page.
- The header of all pages.

- The header on email notifications.
- The icon for the Workday Adaptive Planning pages on your web browsers.
- The icons for Workday credentials and Workday data sources in Design Integrations.
- The Workday for Google Sheets app page in Google Play.

What Do I Need to Do?

You don't need to do anything.

What Happens if I do Nothing?

If you do nothing, we automatically make these changes.

Change Log

New Workday Adaptive Planning Logos

We correct the note to clarify the Production Date.

Preview Date: 2026-02-07. Production Date: 2026-02-07.

Adaptive Planning Notifications

Preview Date: 2026-02-07. Production Date: 2026-03-14.

We introduce the ability to integrate Adaptive Planning notifications with Microsoft (MS) Teams for users to receive real-time alerts within Microsoft Teams.

This feature supports:

- Adaptive Planning instances connected to Workday tenants.
- Adaptive Planning Multi-Instances. You must configure each instance individually for notifications.

Business Benefits

- Consolidates communication by bringing Adaptive Planning alerts into the workspace where users already collaborate.
- Enables immediate visibility into tasks such as workflow approvals or system alerts, facilitating quicker decision-making.
- Drives adoption for non-finance users who may not sign in to Adaptive Planning daily but are active in Microsoft Teams.

Changes

A new Microsoft Teams app tile displays under **Administration > Notification Preferences > Notification Setup**.

- A new Microsoft Teams option displays in the **Connections** section of the Manage Notifications page, allowing users to link their individual accounts.

What Do I Need to Do?

Administrators must have the *Admin Access* permission to configure the connection for the instance. End users require access to their own Microsoft Teams account and the ability to add apps within their Microsoft environment.

Prerequisite

Before integrating MS Teams with Adaptive Planning, you must install the **Microsoft Teams Workday Adaptive Planning** application on your Adaptive Planning instances using either option:

- End Users can search for "Workday Adaptive Planning" within their MS Teams app and click **Add**.

- The Microsoft 365 administrator can install the **Microsoft Teams Workday Adaptive Planning** application for their organization using the instructions in the MS Preinstall apps documentation.

Integration Steps

To use the Microsoft Teams integration, complete these steps:

For Administrators:

1. From the Adaptive Planning main menu, click **Administration**. The Administration page displays.
2. From the **System** menu, click the **Notifications Preferences** link.
3. Locate the **Microsoft Teams** app tile and click **Add**.
4. Follow the prompts to sign into Azure AD and grant admin consent to allow the application to access your tenant.
5. Authenticate your Adaptive Planning administrator credentials to finalize the association.

For End Users:

1. From the Adaptive Planning home page, click **Notifications** and then click **Manage Notifications**.
2. Locate the **Microsoft Teams** tile in the **Connections** section and click **Connect**.
3. Open the **Workday Adaptive Planning** app in Microsoft Teams and click the link in the welcome message to authenticate your account.

What Happens If I Do Nothing?

If you don't configure the integration with MS Teams, users will continue to receive notifications only through the standard Adaptive Planning interface and email. No changes will occur to existing notification preferences or delivery methods.

Change Log

Support for Workday-Enabled Adaptive Planning Instances

Preview Date: 2026-04-10. Production Date: 2026-05-08.

This feature now also supports Adaptive Planning instances that are connected to Workday tenants.

Prerequisite Step for MS Teams Integration

We corrected the **What Do I Need to Do?** section to include a missing prerequisite step for the integration.

Feature Description Updated

We updated the feature description for accuracy.

Planning Agent

Preview Date: 2026-02-07. Production Date: 2026-03-14.

We introduce an enhanced prompting experience for the Planning Agent using agent orchestration. This helps to precisely identify user intent and route to the correct agent skill.

Note: Note: This feature is only available to Planning Agent customers in the U.S., Canada, Europe, and Singapore. For more information about the Planning Agent, contact your Account Executive.

Business Benefits

- Reduces AI errors and "hallucinations" by ensuring the AI is grounded in your actual Metadata Service (MDS) elements rather than general terms.
- Eliminates the need to memorize strict naming conventions or prefixes for complex model structures, allowing for a more natural, conversational workflow.
- Simplifies the process of creating rich, contextual prompts, enabling both new and expert users to derive deeper insights from their data more quickly.

Changes

Users can now:

- Enter the @ symbol to trigger a pop-up menu of element types, such as accounts, dimensions, or versions.
- Enter partial names, abbreviations, or minor typos and still find the correct dimension such as level or account.
- Stop relying on rigid templates as all prompts now route through a freeform processing path.

What Do I Need to Do?

The enhanced prompting experience respects existing user security. Users can only view the data they have access to.

Admins can ensure users have the appropriate permissions to view the model elements they're asking about.

Note: Workday-enabled Adaptive Planning customers must set up the Planning Agent in Agent System of Record (ASOR).

What Happens If I Do Nothing?

Nothing happens. We still support manual queries with additional accuracy and ease of use.

Workday-enabled Adaptive Planning customers can't access the Planning Agent without first setting it up in ASOR.

Change Log

Workday-Enabled Adaptive Planning Customers and Singapore Support

We updated these sections with a note for the Workday-enabled Adaptive Planning customers:

- What Do I Need to Do?
- What Happens If I do Nothing?

We also updated the feature description to add support for the Singapore region.

Updated Feature Description

We have updated the feature description for additional clarification and accuracy.

Correct Feature Name with Updated Description

We have updated this note to reflect the correct feature name and description.

Planning Agent: Data Exploration

Preview Date: 2026-02-07. Production Date: 2026-03-14.

Note: This feature is only available to Planning Agent customers in the U.S., Canada, Europe, and Singapore. For more information about the Planning Agent, contact your Account Executive.

We expand the Planning Agent: Data Exploration (Data Exploration) skill to support deep data exploration throughout the application. Users can now ask natural language questions to summarize data, detect anomalies, compare versions, and instantly generate visualizations. This feature transforms static data into conversational insights, allowing users to query data both within their current view and across the broader model.

Business Benefits

This feature:

- Enables financial planners and analysts and other business users to quickly surface insights, understand variances, and get immediate answers to business questions. They can do this directly from their standard, cube, and model sheets.
- Enables users to perform analyses without having to manually build reports or export data for analysis. This streamlines workflows and enhances efficiency.
- Reduces the risk of mis-analysis through manual reviews. Data highlights and anomalies are automatically surfaced.
- Facilitates faster, more strategic decisions by uncovering critical information and suggesting next steps.
- Makes advanced planning tools intuitive, conversational, and accessible to all skill levels. The feature improves overall productivity and user adoption within the organization.
- Enables users to access and analyze data that might not be directly visible on the active sheet, including data from other versions (such as budgets) or time periods. They can do comprehensive comparisons and variance calculations.

Changes

Data Exploration:

- Is now available anywhere that you can see Ask Workday including standard, model, and cube sheets.
- Supports ranking and grouped aggregations directly within Ask Workday. For example, "What is the average salary by department?"

What Do I Need to Do?

To use the Data Exploration skill, an administrator must assign the *Ask Workday for Adaptive Planning* permission to users.

What Happens If I Do Nothing?

If the required permission isn't assigned, users won't be able to use the Data Exploration skill from Ask Workday.

Change Log

Planning Agent: Data Exploration

We updated the product description and the **Changes** section for accuracy.

Adaptive Planning Hubs

Preview Date: 2026-02-07. Production Date: 2026-03-14.

With this release, we introduce Hubs, a new personalized and central location in Adaptive Planning. Hubs allow administrators to create intuitive, curated workspaces for users to organize, navigate, and interact with a collection of dashboards, sheets, reports, links, and tasks.

Business Benefits

- Provides a single, unified workspace for planners, analysts, and managers, reducing the time spent navigating to different parts of the application.
- Administrators can create and share different hubs for specific functions (Finance Hub, Sales Hub) or processes, ensuring users only see the content most relevant to them.
- Users have immediate access to key instructions and pending workflow tasks, fostering faster, more informed decision-making.
- Respects all existing Adaptive Planning access rules and permissions, ensuring users can only view the data they are authorized to see.

Changes

This feature introduces:

- The Hubs option in the main navigation menu.
- The ability to select a shared hub as the default home page from the user profile page.
- The ability to see a maximum of 3 recent hubs on the home page provided users have access to at least 1 hub.
- The *Access Hubs* permission that enables users access to:
 - The Hubs option in the main navigation menu.
 - Hubs content shared with them.
- The *Edit Hubs* permission enables administrators to create, edit, clone, share, and manage all hubs.

What Do I Need to Do?

1. The administrator must assign these hubs permissions to the appropriate users and groups:
 - Assign the *Access Hubs* and *Access Dashboards* permissions to all users and groups who need to view hubs.
 - Assign the *Edit Hubs* permission to administrators who are responsible for creating and managing hubs.
2. Administrators must actively build, configure, and share the hubs for end-users to access them.

What Happens If I Do Nothing?

If you do nothing, your users don't see any changes to the navigation menu, and no new permissions become active. Your existing dashboards, reports, and workflows continue to function as they do today.

Change Log

Update to Changes List

We updated the **Changes** section to accurately reflect the feature details.

Adaptive Planning Hubs

We update this note to inform you that:

- This feature is now available in preview for everyone.
- We removed the AI-powered performance summaries that were available in the limited availability version.
- We added the ability to see recent hubs from the home page.
- We added the *Access Dashboards* permission as a requirement for users and groups to view hubs.
- We updated these sections to reflect the latest product behavior and capabilities:
 - Changes
 - Business Benefits
 - What Do I Need to Do?
 - What Happens if I Do Nothing?

Adaptive Planning Hubs

We correct this note to inform you that this feature is currently released as limited availability. Accordingly, we have updated the **What Do I Need to Do?** section to include information about who has access to the feature.

Chart Visualization in Dashboards

Preview Date: 2026-02-07. Production Date: 2026-03-14.

We now introduce rounded corners for several chart types, customizable single-color gradients for area and bar-style dials, and improved control over gridlines and data point markers.

Business Benefits

- Updated line markers and optional gridlines provide stronger visual contrast, making it easier for users to identify specific data points and comprehend complex datasets.
- Rounded corners and sophisticated gradient fills create a visually engaging and professional interface that aligns with modern design standards.

Changes

- By default, rounded corners are applied to Pie, Doughnut, Pyramid, Funnel, Bar, Column, Waterfall, and Microchart Column dials.
- Gauge dials are updated with a modern style, including rounded corners and the ability to update font colors, which default to the Pen1 color.
- Y-Axis styling is refined by removing ticks and axis lines, and updating the remaining axis line color to #787878.
- Added a new **Show Gradient** option in the Appearance general settings for supported dials.
- Added linear single-color gradient support for Area, Bar, Column, Waterfall, Gauge, and Pie family dials (including Pyramid and Funnel).
- Microcharts (Area and Column) and AI Summary KPI Microcharts now support single-color gradients to enhance visual engagement.
- Added a **Show Marker** option to Standard Dials (per series), Trendlines, and Microcharts (per chart).
- Default marker states are now enabled for Line and Fan dials, and disabled for Area dials.
- Introduced Horizontal and Vertical Gridline options in Appearance settings, with defaults based on the specific dial type. Example: vertical gridlines default to On for Bar charts.

What Do I Need to Do?

The Gradient on Charts and Show Gridlines options are enabled by default. The visual updates such as rounded corners and axis styling are also automatically applied.

Administrators must enable gradients or gridlines for specific charts:

1. From the main menu, select **Dashboards**.
2. Click **Dashboard Preferences** and then select **Themes**.
3. For individual dials, navigate to the **Appearance** section in the chart settings and enable the **Show Gradient** or **Show Gridlines** options as desired.

What Happens If I Do Nothing?

Basic UI modernization, such as rounded corners and updated axis styling, apply automatically to all users without an opt-out preference. The **Gradient on Charts** and **Show Gridlines** options are enabled by default.

Pattern Reports User Experience

Preview Date: 2026-02-07. Production Date: 2026-03-14.

We refresh the pattern reports user interface for a consistent user experience across all web report types.

Business Benefits

Provides a faster, more intuitive interface for viewing and interacting with complex data spreads.

Changes

The UI looks different now for pattern reports and matches other web report types.

Transaction Reporting Performance

Preview Date: 2026-02-07. Production Date: 2026-03-14.

We provide an easy way to delete transactions to manage large volumes of transaction data.

Business Benefits

- Prevents performance degradation caused by excessive transaction volume, ensuring a faster experience for all users.
- Provides a user-friendly way to delete old records directly in the UI.

Changes

A new option under **Integration > Manage Transactions** that supports the easy deletion of transactions without requiring a row-by-row file import.

Change Log

Correct UI Element Name

We update the note to correct the UI element name from **Manage Integrations** to **Manage Transactions** in the Changes section.

View Last Updated Date for Web Reports

Preview Date: 2026-02-07. Production Date: 2026-03-14.

With this release, we add the ability for users to see when matrix reports were last modified.

Business Benefits

- Provides visibility into when reports were modified.
- Helps administrators and users identify stale or outdated reports that may need archiving or updating.

Changes

When you navigate to the Reports page from the main menu and open a report folder, the **Last Updated Date** column now displays the date of the most recent modification for each report.

What Do I Need to Do?

The **Last Updated Date** column is automatically added to the default view of the Reports overview. No manual configuration is required to begin tracking these dates for new modifications.

What Happens If I Do Nothing?

The **Last Updated Date** column displays by default for all users with access to the Reports page. If you made no recent modifications to older reports, the field remains blank until the next time you save these reports.

Calculation Error Messages

Production Date: 2026-03-13.

With this release, we make it clearer when your reports and exports include calculation errors caused by account configuration issues.

Business Benefits

This enables you to discover and resolve errors more easily and ensures you're always viewing a complete data set.

Changes

When your report or export contains calculation errors caused by incorrect account configurations, Workday now displays an error message and no longer returns any data. Previously, Workday enabled you to proceed without notifying you of the calculation errors and may have returned partial data.

What Do I Need to Do?

We recommend you:

- **Run Formula Validation** to find issues that previously may have produced silent, incomplete results. Workday will now display errors on those reports and exports
- Review reclassified accounts and their associated rules, as some of their configurations may not be supported.

You can also deselect **Optimize Report Execution** on reports when you encounter errors messages about unsupported operations. Example: Using the optimized report execution.

What Happens If I Do Nothing?

Your reports and exports may continue to contain calculation errors caused by account configuration issues.

Change Log

Calculation Error Messages

We omitted this release note from the Production section of the 2026-03-13 service update.

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Accounts with a Level/Dimension Rollup of Text

Preview Date: 2026-04-10. Production Date: 2026-04-10.

With this release, Workday now displays accounts with a rollup type of text more consistently.

Business Benefits

This ensures data is consistent across your model, providing you with accurate information.

Changes

Workday now displays custom accounts and cube accounts with a Level/Dimension rollup of Text more consistently across your models. Previously, data displayed on reports or exports didn't match data from sheets, depending on your configurations.

Related Info

- [Concept: Rollup Cells in Sheets](#)
- [Reference: Settings for Cube Standard Accounts](#)
- [Reference: Settings for Custom Accounts](#)

Improved Performance for Actuals Updates

Preview Date: 2026-04-10. Production Date: 2026-04-10.

When you modify actuals, Workday now only recomputes values where necessary.

Business Benefits

By removing the need to fully recompute all reports and exports whenever actuals are modified, we improve the performance of your models. This is especially important as it reduces lag and wait times when multiple users are viewing reports at the same time.

Changes

With this release, when you import or save actuals on sheets, Workday now identifies the changed values and updates them without impacting other values. Previously, Workday discarded and recomputed all data in the version, regardless of which values were updated.

Workday will continue to complete a full recomputation when you complete these actions:

- Modify metadata, such as modifying model structures. This includes metadata imports that occur in the same scheduled run of actuals imports.
- Import foreign exchange rates.
- Change consolidation percentages.
- Use the **Erase Data** integration option. To prevent recomputation, you can use the Import Data integration option and select **Enable Replace Mode** instead.
- Modify a base version of a report. This recomputes any virtual versions based on that report.
- Select Make New Actuals Visible when you import actuals.
- Access any instance of an actuals version tree configured with allocations or eliminations.
- Open a report with many calculated accounts for the first time after you import it. Workday computes all calculations when the report is first opened, but will only update changed values in subsequent runs.

What Do I Need to Do?

Note: Note: To request this feature, contact your Named Support Contact (NSC) to submit a Workday Customer Care request. After confirming that you're eligible, we'll enable the feature.

After the feature is enabled, we recommend you complete these actions to support the improved performance of actuals updates:

- Run foreign rate exchange imports in its own process separate from the regular actuals import schedule. You can reduce the frequency of these imports as needed.
- Reduce metadata changes during peak usage hours.
- Use the Import Data integration option and select Enable Replace Mode to import data instead of the Erase Data integration option.
- Run metadata imports and actuals imports as 2 separate scheduled jobs and ensure there's enough of a loading time buffer between the two.

2026R1 Planning for HCM and Financials

Planning for HCM and Financials

These features require you to have additional SKUs related to Human Capital Management or Financials.

Org Design and Scenario Modeling

Preview Date: 2026-02-07. Production Date: 2026-03-14.

With this release, we introduce Org Design and Scenario Modeling, a new capability within Adaptive Planning for the Workforce. This feature enables workforce planners and HR business partners to model organizational changes in a secure, sandbox environment. You can create multiple "what-if" scenarios to restructure hierarchies, move positions, and modify attributes without affecting your live HCM data until you're ready to execute.

You can visualize your current organization, drag and drop organizations and positions to model changes, and instantly see the impact on key metrics such as headcount, FTE, and workforce costs. Once you finalize a scenario, you can route it for approval using a new business process designed specifically for org modeling.

Watch the video: 5m 40s

Business Benefits

This feature enables you to:

- Quickly adapt your organizational structure to meet changing business needs by modeling various scenarios side-by-side.
- View real-time updates to cost and headcount metrics as you model changes, allowing you to assess the financial and operational impact of restructuring immediately.
- Share scenarios with key stakeholders and HR leaders for feedback and collaborative planning within a secure environment.
- Gain immediate visual insights into management ratios and organizational depth through interactive charts and KPI cards.

Changes

Org Models and Scenarios Dashboard

We deliver a new **Org Models and Scenarios** dashboard (secured to the *Manage: Org Models* and *Participate: Org Models* domains). This centralized hub enables you to view your models and scenarios shared with you. From here, you can launch the modeling interface, create new scenarios, and track status.

We add the **Create Org Model** task (secured to the *Design Org Models* business process) to initiate a new org modeling project. You can define the model name, effective date, organization hierarchy type, and top-level organization. You can access this task from the new dashboard.

We add the **Launch Org Model** task (secured to the *Manage: Org Models* and *Participate: Org Models* domains) that you can use to open the visual modeling interface. You can access this task from the new dashboard.

User Interface and Visualizations

On the visual org modeling interface, we enable you to:

- Click and drag organizations or positions to move them to different parts of the hierarchy.
- Compare scenarios to view differences in headcount, cost, and structure side-by-side.
- Copy models to create alternative versions of your plan.
- Select multiple organizations or positions to perform bulk edits or moves.
- Use related actions on org nodes to create subordinate orgs, edit orgs, inactivate or reactivate orgs, assign roles, create positions, or edit positions.
- View key metrics like Total Workforce Cost, Headcount, FTE, Span of Control, and Layers. These metrics update dynamically as you make changes.

We display warning toast messages when you exceed the guidelines set by your administrator for:

- Layers
- Span of Control

We don't prevent you from continuing after you exceed these guidelines.

We display a loading indicator on your cursor after you click on the related actions menu for items in this modeling interface, and you're waiting for the related actions menu to appear.

Analytics View

We add these visualizations to the Analytics view:

- **Total Orgs** key metrics card.
- **Distribution** donut chart that displays the split of headcount across individual contributors (ICs) and managers.
- **Org Distribution** donut chart that displays the split between orgs with no subordinate org layers and orgs with subordinate layers.
- **Org Health** section with bars that display the number and percentage of orgs with span deviations, positions in excess layers, orgs with negative counts, and a link to view the guidelines.

We enhance the Analytics view by enabling you to:

- Drill into charts. You can now click on chart segments (such as a span bar or position layer) to open a pop-up containing detailed information for that segment.
- Filter visualizations across all tabs using your org selection.

On the **Org Structure** tab, we now enable you to:

- View your organization hierarchy in a sunburst chart. We also enable you to view the organization hierarchy using an icicle chart, which we now display as the default chart.
- Select **Span of Control** in the *Property* filter to color chart segments by span of control category relative to your administrator's guidelines. We color segments using these categories: **Micro**, **Narrow**, **Optimal**, and **Wide**.

We rename these guideline-based bucket labels on the **Span of Control Distribution** chart on the **Spans and Layers** tab:

- Below Guidelines to **Micro**.
- Below Min Guidelines to **Narrow**.
- Within Guidelines to **Optimal**.
- Above Max Guidelines to **Wide**.

On the **Total Orgs** key metrics card on the **Summary** tab, we enable you to click the org change breakdown to view details for organizations that are:

- In the baseline.
- Newly created.
- Inactivated.
- Moved in.
- Moved out of the selected org.

Security and Setup

We deliver these new domains (secured on the Adaptive Planning for the Workforce functional area):

- *Manage: Org Models* that you can use to configure who can create org models and initiate the collaboration process.
- *Participate: Org Models* that you can use to configure who can view and edit org models that they are invited to.
- *Set Up: Org Model* that you can use to configure who can use the configuration tasks and edit the guidelines.

We deliver a new *Design Org Models* business process (secured to the Adaptive Planning for the Workforce functional area) that you can use to configure who can collaboratively design org models and scenarios using shared participation.

Org Model Reporting

We deliver a new **Direct Parent from Organization** report field on the Organization business object (secured to the *Public Reporting Items* domain) that you can use to return the direct parent for hierarchical organizations or a singular container for content organizations.

We deliver these new report fields on the Headcount Plan Line Details business object (secured to the *Public Reporting Items* domain) to support delta reporting:

- **Cost of Workforce Amount**
- **Full Time Equivalent**
- **Is Manager**
- **Position Availability Date**
- **Position Element**

We deliver these new report fields on the new Planning Org Change business object (secured to the *Public Reporting Items* domain) to support delta reporting:

- **Is Newly Created**
- **New Parent or Container**
- **Organization Entity**
- **Plan Scenario**

We deliver the **Position rolls up to Top Level Organization for Org Model** report field on the Plan Executable business object (secured to the *Manage: Org Models* and *Participate: Org Models* domains) that you can use to evaluate whether positions roll up to the top level organization for your org model.

What Do I Need to Do?

Enable the new domains:

1. Access the **View Domain** report and locate the new *Manage: Org Models*, *Participate: Org Models*, and *Set Up: Org Model* domains in the Adaptive Planning for the Workforce functional area.
2. Enable these domains and add the appropriate security groups to the View and Modify permissions. Examples: Add the Workforce Planner or HR Administrator security groups.
3. Activate your pending security policy changes.

Configure the new business process:

1. Access the *Design Org Models* business process definition.
2. Add a Shared Participation step. Assign security groups to this step. Example: Assign the Org Model Owner security group.
3. Configure the Approval step to route completed models to the appropriate approvers. Examples: Route to the HR Executive or Manager security groups.

If you want to use custom calculations for workforce costs, ensure you have configured the necessary calculated fields on the Headcount Plan Line Details business object. You can select these fields during the **Create Org Model** task, which you access on the **Org Models and Scenarios** dashboard.

What Happens if I do Nothing?

If you don't enable the new domains or configure the business process, the Org Design & Scenario Modeling features will not be accessible to your users. Existing workforce planning functionality will remain unchanged.

Related Information

[Workday Community: Video: Setup Org Design & Scenario Modeling \(2026R1\)](#)

Change Log

Org Structure Icicle Chart and Summary Analytics

We update the Changes field to document the icicle chart and span of control coloring on the **Org Structure** tab, updated span of control category labels on the **Span of Control Distribution** chart, and org change details on the **Summary** tab.

Preview Date: 2026-07-03. Production Date: 2026-07-31.

Analytics View Enhancements

We update the Business Benefits and Changes fields to document new charts and capabilities on the Analytics view.

Preview Date: 2026-05-01. Production Date: 2026-05-15.

Org Design and Scenario Modeling

We correct this note to clarify the Org Models and Scenarios Dashboard subsection of the Changes section.

Org Design and Scenario Modeling

We correct this note to clarify the What Do I Need to Do? section and add a link to Related Information section.

Warning Toast Messages

We update the Changes field to document new warning toast messages when you exceed Layers and Span of Control guidelines.

Preview Date: 2026-02-27. Production Date: 2026-03-14.

Loading Indicator

We update the Changes field to document a new loading indicator for your cursor after you click on a related actions menu.

Preview Date: 2026-02-27. Production Date: 2026-03-14.

Org Models and Scenarios Report Fields

We update the Changes field to document new report fields on these business objects:

- Headcount Plan Line Details
- Organization
- Plan Executable
- Planning Org Change

Preview Date: 2026-02-07. Production Date: 2026-03-14.

Org Design and Scenario Modeling: Headcount Reduction and Redeployment

Preview Date: 2026-05-29. Production Date: 2026-07-03.

This feature enables organizational strategists and business leaders to model workforce reductions and worker redeployments within Org Design and Scenario Modeling scenarios. You can model the closure of existing filled or open positions, create To Be Reduced placeholders for planned reductions, and move workers between positions to optimize organizational structures. The system now systematically handles calculations based on action types, ensuring that Headcount, FTE, and Cost of Workforce metrics accurately reflect the impact of planned closures and reductions.

Business Benefits

This feature provides you with:

- **Strategic agility.** You can model complex reduction and redeployment scenarios to align with changing business goals without affecting live production data.
- **Enhanced decision support.** You can gain instant visibility into the cost and structural impacts of workforce reductions through dynamic KPIs and updated organizational health analytics.
- **Streamlined execution.** This feature links the planning of workforce movements and closures to downstream execution in HCM, reducing manual reconciliation efforts.

Changes

Modeling Actions

We add these new related actions that you can access when you launch and edit org model scenarios:

- *Reduce Headcount* on active orgs, which enables you to create To Be Reduced placeholder records, including planned new orgs.
- *Close* on positions with a **Staffing Status** of *Open* or *Filled*. When you close a filled position, we automatically notify you that the worker will be removed.
- *Reopen* on closed positions, which enables you to revert planned closed positions back to *Open* status within the same scenario.
- *Transfer Worker* on filled positions, which enables you to move a worker from a source position to a proposed open or To Be Hired position within the scenario using a new form.

We change the **Planning Staffing Status** field so that it:

- Is now read-only.
- Updates automatically based on modeling actions, such as *Reopen*, *Close*, or *Assign Roles*.

We update the calculation engine to treat metrics based on the specific modeling action. While edits and adds remain positive, we now treat a closed position as \$0, 0 Headcount, and 0 FTE. For To Be Reduced placeholders, we use the value from your **Cost Estimate By Calc** field but treat it as a negative value in all rollups and analytics.

User Interface and Visualizations

We update the formatting and icons on position cards to distinguish between these statuses:

- *New (TBH)*
- *Moved*
- *Edited*
- *TBR*
- *Closed*

We also update the cards for To Be Hired positions with an assigned worker to now display the worker's profile image with a dotted circle.

We rename the **Model Variance** section in the **Summary** tab to **Org Health**. In the **Org Health** section, we also add a new **Orgs with negative metrics** row that appears when reductions cause negative headcount or cost values.

We now include warning messages or specific groupings to handle orgs or layers with negative total headcount on these charts:

- **Span of Control**
- **Org Structure**
- **Position Distribution**

We add a new **To Be Reduced** tab to the **Review Changes** task which displays closed positions and worker transfers within the **Edited** section.

Reporting

We deliver these new report fields on the Headcount Plan Lines Details business object (secured to the *Public Reporting Items* domain):

- **Closed Headcount.** You can use this report field to identify plan lines with closed headcount.
- **Reduce Headcount.** You can use this report field to identify plan lines with reduced headcount.

We update the **Positions** report data source to return negative values for these org model metrics when you reduce headcount to negative amounts:

- Cost of Workforce.
- FTE.
- Headcount.

What Do I Need to Do?

If you already configured Org Design and Scenario Modeling, you don't need to do anything. To configure Org Design and Scenario Modeling, see [Steps: Set Up Org Design and Scenario Modeling](#).

What Happens if I do Nothing?

If you do nothing and already configured Org Design and Scenario Modeling, we automatically display the new related actions for modeling headcount reductions, closures, and redeployments. Your existing analytics will continue to function and will reflect negative headcount or cost impacts from potential reductions.

If you do nothing and didn't configure Org Design and Scenario Modeling, the Org Design & Scenario Modeling features will not be accessible to your users. Existing workforce planning functionality will remain unchanged.

Test Scenarios

We recommend that you check the **Cost Estimate By Calc** field on your org model to ensure that it returns the expected values.

Related Information

[2026R1 Feature Release Note: Org Design and Scenario Modeling](#)

[Steps: Set Up Org Design and Scenario Modeling](#)

Change Log

Org Design and Scenario Modeling: Headcount Reduction and Redeployment

We now deliver this feature to your Preview tenant and update the Release Note Type from Coming Soon to Feature.

Preview Date: 2026-05-29. Production Date: 2026-07-03.

Headcount Planning Application

Preview Date: 2026-02-07. Production Date: 2026-03-14.

When you perform position-level workforce planning, we enable you to secure access to compensation-related columns when you view headcount or headcount forecast plans.

Business Benefits

This gives you more control over who can view and edit compensation data on your headcount and headcount forecast plans.

Changes

On the **Roster Sheet** page of the **Manage Workforce Planning Configuration Manager** task, we update the check boxes on the **Secure Data** column to now secure compensation data on headcount plans and headcount forecast plans.

When you select the **Secure Data** check box for sheet columns, we now only display the data to users with access on the *Compensation Details: Headcount Planning* domain.

We secure access to compensation-related columns when you view the headcount or headcount forecast plans using these My Tasks items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

Note: We don't secure access to columns using the *Compensation Details: Headcount Planning* domain for existing headcount and headcount forecast plans.

What Do I Need to Do?

If you want users to have access to data that's secured by the **Secure Data** column, add those users to security groups with access to the *Compensation Details: Headcount Planning* domain.

Related Information

[Manage Workforce Planning Configurations](#)

Publish Financial Plans Time Span Limit

Preview Date: 2026-02-07. Production Date: 2026-03-14.

With this release, we now allow you to select plan structures for publishing that span up to 10 years.

Business Benefits

This enables you to:

- Create larger financial plans for more extended time periods.
- Provide downstream accounting users more financial plan lines to work with.

Changes

We now display financial plan structures that span up to 10 years in the **Plan** prompt when you select plans to publish.

What Do I Need to Do?

You don't need to do anything.

What Happens if I do Nothing?

If you do nothing, we automatically display plan structures with time spans up to 10 years.

Related Information

[Publish Financial Plans from Adaptive Planning](#)

2025R2 Release Notes

2025R2 Service Pack Release Notes

Release: 2026-07-24

- [Task Name Change](#): We update the Unified User Provisioning and Authentication (UPA) for Workday Adaptive Planning release note to add a change log for a feature update.

Release: 2026-04-10

- [Support for Workday-Enabled Adaptive Planning Instances](#): We update the Adaptive Planning Notifications release note to add a change log for a feature update.
- [Duplicate Reports](#): We update the Workday for Google Sheets release note to add a change log for a feature update.

Release: 2026-02-07

- [Editable Charts in Google Slides](#): We update the Workday for Google Sheets release note to add a change log for a feature update.
- [Support for Keyboard Keys](#): We update the Workday for Google Sheets release note to add a change log for a feature update.

Release: 2025-12-12

- [Version-Specific Overrides for Linked Accounts](#): We update the delivery dates for the Preview and Production redelivery for this functionality from 2025-11-21 to 2025-12-12.
- [Sheets Performance Evaluator](#) : We deliver a new feature. We omitted this release note from the Production section of the 2025-11-21 service update.

Release: 2025-11-21

- [Persist Report Formatting](#): We update the Workday for Google Sheets release note to add a change log for a feature update.
- [Version-Specific Overrides for Linked Accounts](#): We now redeliver this feature to your Preview and Production tenants.
- [Adaptive Planning Hubs](#) : We deliver a new feature as limited availability.
- [Planning Agent: Data Exploration](#) : We deliver a new feature as limited availability.
- [Workday for Google Sheets](#) : We deliver a new feature as limited availability.
- [Unified User Provisioning and Authentication \(UPA\) for Workday Adaptive Planning](#) : We deliver this feature to production.

Release: 2025-10-10

- [Multiple Segments for Report Organization](#): We update the Workday for Google Sheets release note to add a change log for a feature update.
- [Version-Specific Overrides for Linked Accounts](#): We revert this functionality from Preview and Production tenants. We plan to redeliver this functionality in a future service update.

Multicoordinate Support for Cell Explorer

Preview Date: 2025-08-16. Production Date: 2025-09-20.

Workday now enhances Cell Explorer functionality within Adaptive Planning dashboards and reports to support multilevel and multidimension coordinate selections in filters. This enables you to drill into

contributing account, level, and dimension details from aggregated data when multiselect is enabled in these areas.

Business Benefits

This provides you with:

- Rapid root cause analysis and exception reporting. You can now quickly identify the underlying data that contributes to aggregated numbers, which accelerates problem-solving.
- Improved data exploration flexibility and granularity. Perform more nuanced and precise analysis by easily exploring custom rollups.
- Reduced manual effort and human error. This feature eliminates the need for manual data exports, pivot tables, or running multiple reports to understand aggregated details. Additionally, it provides guided selections that prevent incorrect data filtering.

Changes

On dashboards and reports, we now enable you to use Cell Explorer when you select multiple values on your dimension and level filters. These values can be any combination of:

- Dimension values on different dimensions.
- Dimension values on different hierarchy levels within a dimension.
- Dimension values on the same hierarchy level within a dimension.
- Level values on different hierarchy levels.
- Level values on the same hierarchy level.

When you select multiple level and dimension values on your dimension filters and use Cell Explorer, we now:

- Display all dimensions, including cube dimensions and other dimensions, in the Dimensions section and all attributes in the Filters section.
- Display new Rolls up to links in the Account and Time sections if the parent account exists and you have permission to access that data.
- Display new Show All and Hide All links so you can control whether you see all the values for a level or dimension. We only display these links when you select 5 or more values in a level or dimension.
- Hide the Suppress rows if all zeros or blank check box on the Cell Explorer because we suppress by default for multiselect. We continue to display this check box if you select 1 level or dimension value and use Cell Explorer.
- Rename the Level section to Levels.

Change Log

Multicoordinate Support for Cell Explorer

We now deliver this feature to your Preview tenant and update the Release Note Type from Coming Soon to Feature.

Preview Date: 2025-08-16. Production Date: 2025-09-20.

Related Information

Concept: [Explore Cell and Row Details](#)

Version-Specific Overrides for Linked Accounts

Preview Date: 2024-10-11. Production Date: 2025-12-12.

With the 2025R2 release, we make version-specific overrides for linked accounts generally available. All customers can now use options in the account settings to enable linked accounts for data entry in specific plan versions.

Business Benefits

The ability to override links for specific versions provides flexibility in the model. With these options you can leverage the links for certain versions when it suits your business needs. In other versions you can enable the data entry override so that you can:

- Import data into the account.
- Populate data into the account with Predictive Forecaster.
- Enter data into the account on sheets.

Changes

We provide these new options in the Link Filters section of the account settings:

- Override links for specific version: We enable you to select this check box to display the override fields for the account.
- Link Version Selector: We enable you to select a plan version for the override.
- Override Link Setting: We provide these options: *None* to keep the link, and *Data Entry* to enable imports and data input on sheets.

We provide the new options in the account settings of the target accounts that support links:

- Cube Standard.
- Cube-Entered.
- General Ledger.
- Custom.

After you set up the override, you can enter data:

- In sheets.
- With manual imports.

You can load and export the data through:

- Loaders in Design Integrations for only general ledger and custom accounts.
- customReportValues and exportData APIs.

At this time, we show plan data during actuals overlay periods when a linked account has both of these settings:

- Enable Actuals for Link for the Actuals Overlay setting.
- *Data Entry* for the Override Link Setting.

You can now import data into data entry linked accounts in the current version for cube and standard accounts.

What Do I Need to Do?

To enable the feature for a linked account:

1. Go to Modeling.
2. Click:
 - Custom Account.
 - General ledger.
 - Edit a cube sheet and click Cube Accounts from the Sheet Summary page.
3. Select the linked account from the account list.
4. Click the check box for Override links for specific version.
5. Complete the other fields that display.
6. Save.
7. Load or enter data.

What Happens If I Do Nothing?

The options remain available to use when you need it.

Change Log

Version-Specific Overrides for Linked Accounts

We update the delivery dates for the Preview and Production redelivery for this functionality from 2025-11-21 to 2025-12-12.

Preview Date: 2025-12-12. Production Date: 2025-12-12.

Version-Specific Overrides for Linked Accounts

We now redeliver this feature to your Preview and Production tenants.

Preview Date: 2025-11-21. Production Date: 2025-11-21.

Version-Specific Overrides for Linked Accounts

We revert this functionality from Preview and Production tenants.

We plan to redeliver this functionality in a future service update.

Data Imports Into Data Entry Linked Accounts

We update the note to document the ability to import data into data entry linked accounts in the current version for cube and standard accounts.

Preview Date: 2025-09-20. Production Date: 2025-09-20.

Related Information

[2024R2 Feature Release Note: Version-Specific Overrides for Linked Accounts](#)

Translated Currencies for Actuals Versions

Preview Date: 2025-08-16. Production Date: 2025-09-20.

With the 2025R2 release, we make translated currencies generally available. All customers can now use translated currencies to load actuals data in a specific currency for all levels. You can load your data in the local currency of each leaf level as usual. In addition, you can load the same set of data in a single currency for all levels.

Business Benefits

When your source systems store granular, transaction-specific exchange rates, you can get variances between the actuals in your source and the actuals in Adaptive Planning because of how we convert the data between currencies. Loading translated actuals eliminates the conversion of the actuals data.

With translated currency, you load your actuals already translated from your source. As a result, the actuals in Adaptive Planning exactly matches the actuals in the source for the currency.

In addition, reports pull from the actuals loaded in the currency, removing the need to calculate conversion with exchange rates.

Changes

In the Version area of Modeling, we provide a new Enable Translated Currency check box in the settings within sub-versions of actuals. When you enable this check box, the Selected Currencies drop-down prompt enables you to select 1 currency as a translated currency.

In Design Integrations, we update your ability to import actuals data into the version that you enabled for translated currencies. You have the option to select:

- The nested currency within the sub-version to load the full data set in a single currency for all levels.
- The sub-version itself to load data as usual in the local currency of each level.

We also update these APIs:

- v40 of the exportVersions: We add the currencyVersions attribute in the Include element to indicate if the nested currency of the sub-version is included in the response.
- v40 of the importStandardData: The API supports imports to the sub-version for the currency.

We also enable you to set up translated currency from the financial planning configuration manager task in Workday. We provide these new fields:

- Translated Currency on the Currency page enabling you to select up to 1 translated currency.
- Account Translation Rule Set on the Actuals page enabling you to select the rule set for mapping translation rate types to ledger accounts.

When you enable translated currencies on versions, we continue to display values using local currencies for each level on sheet data and Explore Cell on sheets.

When you enable translated currencies on versions and explore cells in these areas, we now display values using the reporting currency of those cells:

- Dashboards.
- OfficeConnect.
- Web Reports.

What Do I Need to Do?

To see if your instance is eligible for this feature, a Named Support Contact must contact us. See [Reference: Contact Us](#).

Examples

Your instance uses both USD and EUR. For the sub-version, Ledger Import, you enable translated currencies and select USD as the translated currency. Now, you can load your entire actuals data set in USD from your source system.

In Integration, when you select Ledger Import version for importing your actuals data, you have the option to select the USD currency, which displays nested under the Ledger Import version.

Later, you build a report in USD and pull the appropriate data in the currency of the report, without the conversion of data with exchange rates.

Related Information

[2024R2 Feature Release Note: Translated Currencies for Actuals Versions](#)

[Concept: Currencies and Exchange Rates](#)

[Concept: Translated Currencies](#)

[Reference: Settings for Actuals Versions](#)

Machine Learning Predictive Forecaster

Preview Date: 2025-08-16. Production Date: 2025-09-20.

With this release, we continue to enhance predictive forecasters by automatically filling out fields by default when you create and edit forecasts. We also now enable you to use the ARIMA algorithm and provide improved forecast explanations through the feature impact chart.

Business Benefits

This makes it easier to create forecasts by automatically populating key fields, reducing manual entry and simplifying the setup process for less experienced users.

This enhances forecasting accuracy by enabling you to use the ARIMA algorithm to generate more precise forecasts by accounting for various data patterns and unusual events.

This improves forecast explainability by providing a new feature impact chart that helps you better understand factors and how the levers (regressors) you attach impact your forecast.

Changes

When you create or edit forecasts on the Predictive Forecaster page of Model Management, we now automatically populate some fields when you either:

- First create this forecast.
- Enter a value on the Sheet field.
- Reset all fields on this page because you selected a different sheet or forecast version.

When you first create the forecast, we automatically populate these fields:

- **Forecast Version**
- **Accuracy Metric**
- **Actuals Version**
- **Plan Version**
- **Autodetect Seasonality**

When you enter a value on the Sheet field for the first time, we automatically populate these fields:

- **Forecast Start Period**
- **Forecast End Period**
- **Levels**
- **Dimensions**
- **Actuals Start Period**
- **Actuals End Period**

When you reset all fields on this page because you selected a different sheet or forecast version, we automatically populate these fields:

- **Forecast Start Period**
- **Forecast End Period**
- **Levels**
- **Dimensions**
- **Actuals Start Period**
- **Actuals End Period**

We update the tooltip on the **Dimensions** field.

We add *ARIMA* as an option on the Algorithm field.

We now display new confirmation dialogs when you change the values on these fields to warn you that the action resets all related fields to their default values:

- **Sheet**
- **Forecast Version**

On the **Confidence Metrics** tab of the **Forecast History** page, we display a new Feature Impacts chart.

Change Log

Feature Impacts Chart

We update the note to document the new Feature Impacts chart on the Confidence Metrics tab of the Forecast History page.

Preview Date: 2025-08-16. Production Date: 2025-09-20.

ARIMA Algorithm

We update the note to document the new *ARIMA* option on the Algorithm field when you create or edit forecasts on the Predictive Forecaster page of Model Management.

Preview Date: 2025-08-16. Production Date: 2025-09-20.

Related Information

[Setup Considerations: Predictive Forecaster](#)

[Create Machine Learning Forecasts](#)

Ask Workday for Adaptive Planning

Preview Date: 2025-08-29. Production Date: 2025-09-20.

With this release, we introduce Ask Workday for Adaptive Planning (Ask Workday). Ask Workday:

- Is an artificial intelligence (AI) interface that enables users to interact with Adaptive Planning using natural language.
- Includes Contextual Help which provides which provides a conversational interface to enable you to quickly access information from Adaptive Planning documentation.

Changes

With Ask Workday, you can now:

- Ask questions in natural language and access relevant help exactly when needed.
- Receive concise, context-aware answers without disrupting your workflows.
- Use a "Help me find an answer" prompt on the welcome screen to discover relevant questions.

In addition, Ask Workday provides:

- Type-ahead recommendations
- Smart prompt suggestions
- Response feedback
- Full screen mode

Business Benefits

Ask Workday:

- Enables faster, more strategic decisions by uncovering insights and suggesting next steps in context.
- Boosts productivity and user adoption by making advanced planning tools intuitive, conversational, and accessible to all skill levels.
- Streamlines access to Adaptive Planning information by combining comprehensive search with contextual analysis.
- Provides contextual how-to information for critical tasks such as:
 - Setting up alternate calendars
 - Creating Machine Learning (ML) forecasts
 - Reviewing scenario changes
 - Changing default currencies
- Boosts productivity and reduces dependency on support teams by making learning intuitive and seamless.

What Do I Need to Do?

Assign the *Access Ask Workday for Adaptive Planning* permission to:

- Administrators so they can enable Ask Workday for an Adaptive Planning instance. After it is enabled, the **Ask Workday** icon displays on the global toolbar across the application.
- End users so they can view the **Ask Workday** icon on the global toolbar for accessing Ask Workday.

What Happens If I Do Nothing?

Without the *Access Ask Workday for Adaptive Planning* permission assigned:

- Administrators can't enable Ask Workday for an Adaptive Planning instance.
- End-users can't view the **Ask Workday** icon for accessing Ask Workday for Adaptive Planning.

Change Log

Permission Name and Icon Change

We rename the *Access Workday Assistant for Planning* permission to now *Access Ask Workday for Adaptive Planning*.

We also replace the sparkle icon with the **Ask Workday** icon.

We've updated these sections to reflect these latest changes:

- What Do I Need to Do?
- What Happens If I Do Nothing?

We update this note to inform you that:

- This feature is now available in Preview.
- We've updated the feature name.

Planning Agent: Data Exploration

Preview Date: 2025-11-21.

With this release, we introduce the Planning Agent, a new AI-powered assistant that transforms how you interact with your data in Workday Adaptive Planning. The first available agent skill, Data Exploration, uses Generative and Conversational AI to provide contextual analysis and insights on open matrix reports. You can now use natural language prompts or guided questions to instantly summarize data, identify trends, detect anomalies, and perform deep variance analysis.

Business Benefits

This feature helps you:

- Drastically reduce the time spent manually searching for and calculating the drivers of variances, allowing you to focus on strategic interpretation and action.
- Enable business users, budget owners, and other stakeholders to conduct their own sophisticated analyses without relying on FP&A or system administrators, fostering broader data literacy.
- Gain immediate, contextual insights to quickly identify root causes, surface trends, and drive more informed decisions across your organization.
- Streamline the creation of presentations by instantly generating narrative summaries and visualizations that explain key business drivers.

Changes

When viewing a matrix report, you'll find a new **Ask Workday** icon in the toolbar, which opens the **Data Exploration** sidebar. From here, you can:

- Use pre-defined prompts like **Summarize this report** and **Detect anomalies** or type open-ended questions to analyze your data.
- Receive AI-generated responses that include narrative summaries, charts, and tables.

- Change the chart type for visualizations and hover over data points for more detail.
- Download summaries and visualizations directly to a PowerPoint presentation.

The Data Exploration skill includes a powerful variance analysis capability that allows you to:

- Automatically identify the top five variances in a report or set custom thresholds to highlight significant variances.
- Analyze a variance to instantly determine the primary dimensions (like Cost Center or Product) driving the result.
- Break down a variance by other contributing dimensions to explore it from every angle.

What Do I Need to Do?

Note: To request this feature, contact your Named Support Contact (NSC) to submit a Workday Customer Care request. After confirming that you're eligible, we'll enable the feature.

To use the Planning Agent, an administrator must assign you the *Access Ask Workday for Adaptive Planning* permission.

What Happens If I Do Nothing?

If you do nothing, you won't have the required permission. The **Ask Workday** icon won't be visible on matrix reports, and you won't be able to use the Data Exploration feature.

Change Log

Planning Agent: Data Exploration

We update this note to inform you:

- The feature is now available to everyone in preview. See [Planning Agent: Data Exploration](#) 2026R1 release notes.
- We removed the auto-completed suggestions that display when you place your cursor in the Ask Workday for Adaptive Planning prompt. You can no longer select the pre-defined prompts. This capability was available in the limited availability version.

Planning Agent: Data Exploration

We correct this note to inform you that this feature is currently released as limited availability. Accordingly, we have updated the **What Do I Need to Do?** section to include information about how to request the feature.

Related Information

[../.../model-administration/managing-the-model/Intelligent-Planning/Planning-Agent/concept--planning-agent.dita](#)

Tasks and Task Runs in Adaptive Planning Integration

Preview Date: 2025-08-16. Production Date: 2025-09-20.

With this release, we improve the task and task run management user experience in Adaptive Planning Integration by consolidating both functionalities into 1 page, adding a switch so that you can view either tasks or task runs, adding filters, and adding a button that you can use to create tasks.

Business Benefits

This makes it easier and faster to view and manage your tasks and task runs, saving you time and effort.

Changes

We rename the **All Tasks** page in **Manage Integrations** of the **Integration** area to **Tasks**.

We add a new switch on the **Tasks** page in **Manage Integrations** that enables you to toggle between viewing:

- The list of tasks.
- Historical task runs.

When you view task runs on the page, we display:

- Name
- Type
- Status
- Next Scheduled Run
- Last Run
- Duration
- Frequency

On the **Tasks** page for both views, we add the Status filter.

What Happens If I Do Nothing?

If you do nothing, you retain your existing tasks, task runs, and their histories.

Related Information

[View and Run Tasks](#)

Cloud Data Connect Pipeline Drill Through

Preview Date: 2025-08-16. Production Date: 2025-09-20.

With this release, we enable you to drill through Cloud Data Connect (CDC) pipelines and see granular contextual or transactional data.

Business Benefits

You can now access transactional details within your cloud data warehouse to make informed planning decisions without needing to:

- Navigate to your cloud data warehouse.
- Load and store the data in Adaptive Planning.

This helps optimize your integrations and data movement by:

- Only needing to load the aggregate data you need for planning into Adaptive.
- Still retaining access to contextual and granular details of those aggregates through live-queries to your cloud data warehouse.

Changes

On the **Setup Pipeline** pages, we add a new:

- Warning message on the **Pipeline Details** page that the version and the sheet need to be unique per pipeline. This ensures there is a single source for Drill Through to query but allows you to create a draft.
- **Drill Through Table** field so you can select the table that contains the data you want to drill through for the loaded aggregate data.
- Error message on the **Review** page when a pipeline already exists to prevent a connection of pipelines with the same destination.

When you download a cube or standard sheet, you can now select **Drill Through to Data** at the leaf node level on a drillable sheet cell or from an explore cell then a **Transactions** pop-up window displays. The Drill Through query leverages live queries to the Drill Through table you configured for the pipeline to return

the data displayed in the pop-up window. You can also optionally export drill-through data relating to the cell that you are drilled into.

We add a new *Drill Into Cloud Imported Numbers* permission.

Note: Drill Through to Data is only supported for CDC managed pipelines, not CDC connections managed through Design Integrations.

What Do I Need to Do?

Add the permission *Drill Into Cloud Imported Numbers* to your permission set.

To use Cloud Data Connect Pipeline Drill Through on a new pipeline:

1. Select **Integration** from the main menu.
2. Select **Setup Pipeline**.
3. Set up Cloud Data Connect. See **Set Up Cloud Data Connect** in the **Related Links** for more information.
4. Select **Drill Through Table** on the **Configure Connection** page.

To use Cloud Data Connect Pipeline Drill Through on an existing pipeline:

1. Select **Integration** from the main menu.
2. Select **Manage Pipelines**.
3. **Duplicate** the pipeline.
4. Select **Drill Through Table** on the **Configure Connection** page.
5. Select **Save and Exit** to save the pipeline as a draft.
6. **Delete** the original pipeline.
7. Navigate to the **Setup Pipeline** page.
8. Select the pipeline you saved as a draft.
9. On the **Review** page select **Complete** to connect the pipeline.

What Happens if I do Nothing?

With Workday 2025R2 and beyond, all managed pipelines must have unique destinations (version and sheet), when creating, editing a draft, or duplicating a pipeline.

Related Information

[Set Up Cloud Data Connect](#)

Pipeline Task Scheduling

Preview Date: 2025-08-16. Production Date: 2025-09-20.

Workday now enables you to create and manage schedules to automatically run Cloud Data Connect pipeline integration tasks. From a pipeline task page, you can create multiple schedules, view run histories, and initiate tasks manually.

Business Benefits

This enhancement enables you to automate your pipeline tasks, reducing the need for manual intervention. Scheduling tasks ensures timely data integration and improves operational efficiency.

Changes

When you select a pipeline task, the task page now includes two new tabs: **Info & Schedules** and **Recent Runs**.

On the **Info & Schedules** tab, you can:

- View the pipeline name, data source, and planning destination.

- Create up to 5 schedules for the task. You can define a name, frequency (Daily, Weekly, or Monthly), time, and time zone, and set the schedule status to Active or Inactive.
- Manage existing schedules to **Edit**, **Pause**, or **Delete** a schedule.
- Initiate a run manually.

On the **Recent Runs** tab, you can:

- View the history of previous task runs, including parameters like period range and version.
- Initiate a run manually.

What Do I Need to Do?

Pipeline task scheduling feature is automatically available. No action is required.

To use pipeline task scheduling feature:

1. Navigate to an existing pipeline task. The page opens to the **Info & Schedules** tab by default.
2. Click **Add Schedule**.
3. Define the name, frequency, time, and status for the schedule to run automatically.

What Happens if I do Nothing?

If you do nothing, the new tabs: **Info & Schedules** and **Recent Runs** will appear on the pipeline task page, but Workday won't create any schedules. You must continue to run your pipeline tasks manually and won't gain the benefit of automation.

Collaborate within Adaptive Planning

Preview Date: 2025-08-16. Production Date: 2025-09-20.

With this release, we introduce in-application chat capabilities on dashboards, user tagging, and expanded notifications.

Changes

End users can:

- Initiate and participate in conversations directly on dashboard widgets.
- Tag specific users in comments to direct questions or attention, triggering notifications for the tagged individuals.
- Receive notifications for tagged comments within Adaptive Planning notifications and through integrated workplace chat applications such as Slack.
- Navigate directly from notifications to relevant comments and data context within Adaptive Planning.
- Use a filter icon associated with comments to automatically adjust their dashboard filters to match the exact data view present when the comment was originally made.
- Edit their own comments, sort comments, and delete comment threads.

Admin users can use all the chat capabilities that end-users can. In addition, they can delete any comments from end-users.

Business Benefits

- Eliminates the need for multiple external communication methods such as emails, separate chat applications, or spreadsheets by enabling direct, in-context discussions within Adaptive Planning.
- Enhances data alignment and accuracy by tying conversations directly to dashboard widgets. The ability to automatically align filter settings to the context of a comment helps prevent misinterpretations and ensures all collaborators are viewing the same data.
- Strengthens data security and compliance as discussions about sensitive planning data are conducted securely within the Adaptive Planning established user access framework.

- Fosters faster decision-making by enabling immediate, targeted communication and quick resolution of questions or discrepancies directly where the data resides.

What Do I Need to Do?

You need these permission assigned to view, create, and delete comments on dashboards:

- *Access Dashboard*: Allows users to view, create, and delete their own comments.
- *Edit Dashboard*: Allows users to delete comments from other users.

Users with *View Dashboard* permission and access to the widget on a perspective can view all conversations related to the widget.

What Happens If I Do Nothing?

If you don't have the required dashboard permissions, you can't use the Comments feature.

Change Log

We update this note to add more information for the user permissions documented in the **What Do I Need to Do?** section.

Workday Adaptive Planning and NetSuite Integration

Preview Date: 2025-08-16. Production Date: 2025-09-20.

If you currently have NetSuite Data Source configured, we inform you about critical changes to the NetSuite policy regarding the release and support of their SOAP Web Services endpoints. These changes can impact existing Workday Adaptive Planning integrations. We advise you on necessary actions to ensure continued NetSuite support.

Changes

Oracle NetSuite has updated its SOAP Web Services endpoint release and support policy, effective with the NetSuite 2026.1 release. The key changes include:

- **Endpoint Release Policy**: New SOAP endpoints will no longer be released with every NetSuite update, but only when deemed necessary for business, technical, or other critical reasons.
- **Endpoint Support Policy**: All SOAP web services endpoints will be supported for three years from their release date. With each new NetSuite release, the oldest endpoint will be automatically retired.

Business Benefits

By proactively upgrading NetSuite, you can help:

- Ensure the uninterrupted operation and stability of your Workday Adaptive Planning integrations, preventing potential service disruptions.
- Avoid situations where integrations cease to work as intended due to the discontinuation of older NetSuite SOAP web services endpoints.

What Do I Need to Do?

If you have configured NetSuite Data Source, we recommend that you review your current NetSuite version and plan for an upgrade to the latest supported NetSuite 2025.1 version.

If you have NetSuite basic integrations, then there's no impact to you.

What Happens If I Do Nothing?

If you have configured NetSuite Data Source and you don't upgrade to the latest supported NetSuite 2025.1 version, your integrations can stop working as intended due to the discontinuation of older SOAP web services endpoints.

Adaptive Planning Notifications

Preview Date: 2025-08-16. Production Date: 2025-09-20.

We now integrate Adaptive Planning Notifications with Slack to enable users to access and manage their notifications in Slack.

Note: This feature supports:

- Adaptive Planning instances connected to Workday tenants.
- Adaptive Planning Multi-Instances. You must configure each instance individually for notifications.

Changes

- A new **Notifications Preferences** link on the **Administration** page. Administrators can use this link to setup the integration of Adaptive Planning Notifications with Slack.
- A new **Connections** section on the **Manage Notifications** page. After their Adaptive Planning instances are integrated with Slack, end users can connect to Slack from here and receive their Adaptive Planning notifications in Slack.

Business Benefits

This feature:

- Significantly enhances communication, collaboration, and efficiency.
- Creates a more connected and productive work environment.

What Do I Need to Do?

To integrate Adaptive Planning instances with Slack, administrators need to complete these steps:

1. From the Adaptive Planning main menu, click **Administration**. The Administration page displays
2. From the **System** menu, click the **Notifications Preferences** link. The Slack app displays on the Notifications Setup page.
3. Click **Add**. For only the first 10 Adaptive instances that are integrated with Slack, a Slack approval page displays.
4. If a Slack approval page displays, click **Allow**.
5. Sign in again to Adaptive Planning to authenticate as the admin user requesting the integration. After a successful integration, a notification informing that the Adaptive Planning instance was integrated with Slack display on these pages:
 - **Notifications Setup**
 - **Manage Notifications**

End users need to complete these steps:

1. In Adaptive Planning, from the **Manage Notifications** page, click **Connect** for Slack. You're prompted to check your Slack messages to complete the connection.
2. In Slack, under **Apps**, click **Workday Adaptive Planning**. A "Welcome to Workday Adaptive Planning for Slack" message displays.
3. Click the **Connect your Adaptive Planning account to Slack** link. The Adaptive Planning sign-in page displays.

4. Sign in to Adaptive Planning for authentication purposes. The **Manage Notifications** page displays either a success message indicating that you're connected to Slack or an error message if the integration was unsuccessful.

What Happens If I Do Nothing?

If the administrators and end users don't complete their respective integration steps to connect Adaptive Planning with Slack, users are unable to access and manage their notifications in Slack.

Change Log

Support for Workday-Enabled Adaptive Planning Instances

Preview Date: 2026-04-10.

This feature now also supports Adaptive Planning instances that are connected to Workday tenants.

Cube Governance: Account Property Update and Merge Sheet Limit

Preview Date: 2025-08-16. Production Date: 2025-09-20.

We now enable you to update the **Read only on sheet** property for Cube Standard and Cube Assumption accounts in bulk.

We also introduce a new guardrail for merged cube sheets.

Changes

- You can update the **Read only in sheet** property in bulk using the Import or Export options available for making bulk changes to your account structure. Previously, we supported updating this property using only the Adaptive Planning user interface.
- If you already have 5 or more merged cube sheets, you will receive an error message when creating another one.

Business Benefits

These updates:

- Enable you to save time by updating the same property for multiple accounts at once.
- Avoid system performance issues.

What Do I Need to Do?

- The option to update the account property in bulk is available by default.
- The default guardrail value for merged cube sheets is five. To change this default value, you must contact Workday Custom Care.

Sheets Performance Evaluator

Preview Date: 2025-11-21. Production Date: 2025-11-21.

With this release, we enable you to evaluate account performance on your sheets for the selected versions and level.

Business Benefits

This enables you to quickly identify which accounts to optimize for faster sheet loads without the need to:

- Manually test your accounts.
- Submit a Support request.
- Rely on Workday Support to troubleshoot the accounts for you.

This saves you time and effort as you optimize your model.

Changes

We deliver a new **Performance Portal** page in the **Other Links** section of the **Planning Center**. You can use this page to select which versions, level, and sheet to evaluate. When you evaluate a sheet, we provide you with a downloadable spreadsheet with this information:

- Account code for each child account.
- Evaluation time in seconds.

What Happens If I Do Nothing?

If you do nothing, any user with access to the Planning Center can use the Performance Portal to evaluate sheet performance.

What Do I Need to Do?

Give the *Planning Center* permission to users who need access to evaluate sheet performance.

Change Log

Sheets Performance Evaluator

We omitted this release note from the Production section of the 2025-11-21 service update.

Preview Date: 2025-11-21. Production Date: 2025-11-21.

Related Information

[The Next Level: Adaptive Planning: Performance Implications of Cold and Warm Cache](#)

[Concept: Model Design Best Practices](#)

[Reference: Performance and Usability of Modeled Sheets](#)

[Reference: Performance and Usability of Cube Sheets](#)

customReportValues API

Preview Date: 2025-08-16. Production Date: 2025-09-20.

We now enable you to apply time offsets to versions data directly using the customReportValues API for comparative analysis.

Changes

To shift the timeline of reported values, you can now specify these optional parameters for the Version element in the customReportValues API:

- Offset: The value by which you want to shift the time in the version.
- Offset-strata: The granularity (year, quarter, month) for the time shift.

Business Benefits

This feature provides flexibility and enhances your reporting and integration experiences.

Examples

```
<tier type="ver">
<el id="2" />
<el id="3" offset="1" offset-strata="2" /> <!-- Co-ordinate with Version id=3
will be offset by 1 unit of time strata id=2. For example if time strata
```

```
id=2 is quarters, then values of Version id=3 co-ordinates will be shown +1
quarter -->
</tier>
```

What Do I Need to Do?

To shift the timeline for your versions in reports, you must specify the Offset and Offset-strata parameters in the Version element of the customReportValues API.

What Happens If I Do Nothing?

The API works as is. Specifying the new version parameters is optional, required only for comparative analysis purposes.

Adaptive Planning Hubs

Preview Date: 2026-02-07. Production Date: 2026-03-14.

With this release, we introduce Hubs, a new personalized and central location in Adaptive Planning. Hubs allow administrators to create intuitive, curated workspaces for users to organize, navigate, and interact with a collection of dashboards, sheets, reports, links, and tasks.

Business Benefits

- Provides a single, unified workspace for planners, analysts, and managers, reducing the time spent navigating to different parts of the application.
- Administrators can create and share different hubs for specific functions (Finance Hub, Sales Hub) or processes, ensuring users only see the content most relevant to them.
- Users have immediate access to key instructions and pending workflow tasks, fostering faster, more informed decision-making.
- Respects all existing Adaptive Planning access rules and permissions, ensuring users can only view the data they are authorized to see.

Changes

This feature introduces:

- The Hubs option in the main navigation menu.
- The ability to select a shared hub as the default home page from the user profile page.
- The ability to see a maximum of 3 recent hubs on the home page provided users have access to at least 1 hub.
- The *Access Hubs* permission that enables users access to:
 - The Hubs option in the main navigation menu.
 - Hubs content shared with them.
- The *Edit Hubs* permission enables administrators to create, edit, clone, share, and manage all hubs.

What Do I Need to Do?

1. The administrator must assign these hubs permissions to the appropriate users and groups:
 - Assign the *Access Hubs* and *Access Dashboards* permissions to all users and groups who need to view hubs.
 - Assign the *Edit Hubs* permission to administrators who are responsible for creating and managing hubs.
2. Administrators must actively build, configure, and share the hubs for end-users to access them.

What Happens If I Do Nothing?

If you do nothing, your users don't see any changes to the navigation menu, and no new permissions become active. Your existing dashboards, reports, and workflows continue to function as they do today.

Change Log

Update to Changes List

We updated the **Changes** section to accurately reflect the feature details.

Adaptive Planning Hubs

We update this note to inform you that:

- This feature is now available in preview for everyone.
- We removed the AI-powered performance summaries that were available in the limited availability version.
- We added the ability to see recent hubs from the home page.
- We added the *Access Dashboards* permission as a requirement for users and groups to view hubs.
- We updated these sections to reflect the latest product behavior and capabilities:
 - Changes
 - Business Benefits
 - What Do I Need to Do?
 - What Happens if I Do Nothing?

Adaptive Planning Hubs

We correct this note to inform you that this feature is currently released as limited availability. Accordingly, we have updated the **What Do I Need to Do?** section to include information about who has access to the feature.

Workday for Google Sheets

Preview Date: 2025-11-21. Production Date: 2026-09-19.

With this release, we introduce Workday for Google Sheets™, a new add-on available in the Google Workspace Marketplace that enables you to connect directly to your Workday Adaptive Planning data within Google Sheets. This integration also includes Ask Workday for Adaptive Planning (Ask Workday), an AI-powered feature that lets you ask questions about your data in natural language.

Business Benefits

This feature streamlines your planning and reporting processes by enabling you to:

- Work with live Adaptive Planning data in the familiar, collaborative environment of Google Sheets, reducing the need to switch between applications and manually export data.
- Use Ask Workday to quickly analyze your data, uncover key trends, and spot anomalies without needing deep technical expertise.
- Easily create and share reports within Google Workspace and export AI-generated summaries and charts directly to Google Slides or PowerPoint to build presentations faster.
- Use the Writeback capability to make planning updates directly from Google Sheets. You can modify the data using familiar functions like formulas and copy-paste before submitting it back to Adaptive Planning.

Changes

You can now:

- Use a new sidebar in Google Sheets to build reports by adding accounts and other dimensions to rows, columns, and filters. You can rearrange elements using drag-and-drop and refresh to pull the latest data from Adaptive Planning.
- Explore data hierarchies directly on the report without changing the report definition. You can expand parent elements to see immediate children, all descendants, or only leaf-level members.
- Apply hierarchy rules to parent elements in the report builder to consistently see the custom hierarchy across the entire report.
- After expanding an element, select specific members to keep or remove from the report, creating a custom view.
- Add multiple segments to group and organize different reporting elements such as accounts and levels within a single report. Currently you can add a maximum of 10 segments.
- Add formatted text to your Google sheets. The formatting persists even after you refresh the reports.
- Write back data changes directly from supported cell intersections to your Adaptive Planning instance. Audit trails tracks these updates.
- Analyze your reporting data using Ask Workday. You can use freeform questions or suggested prompts
- Use these permissions to control access:
 - *Access Workday for Google Sheets*
 - *Access Ask Workday for Adaptive Planning*

What Do I Need to Do?

Note: To request this feature, contact your Named Support Contact (NSC) to submit a Workday Customer Care request. After confirming that you're eligible, we'll enable the feature.

After the feature is enabled, administrators and users must complete these steps:

For Google Workspace and Adaptive Planning administrators:

1. Install the Add-On: A Google Workspace administrator must first add Workday for Google Sheets to the allowlist in the [Google Workspace Marketplace](#) and then install it for the appropriate users or organizational units.
2. Assign Permissions: In Adaptive Planning, go to **Administration > Permission Sets**. Edit the relevant permission set and select the checkboxes for *Access Workday for Google Sheets* and *Access Ask Workday for Adaptive Planning* to grant users access.

For end users:

1. Open the add-on: In a Google sheet, go to **Extensions > Workday for Google Sheets > Workday**.
2. Add your tenant:
 - a. Click **Add Tenant** and select either **Adaptive Planning** (for standalone instances) or **Adaptive Planning via Workday**.
 - b. Enter the required details, such as the tenant name, API endpoint URL, and Authorization URL provided by your administrator.
3. Sign in: After saving the tenant, select it from the list and click **Sign In** to connect to your Adaptive Planning data.

What Happens If I Do Nothing?

If you do nothing, the Workday for Google Sheets add-on will not be available to users in your organization. Users will not be able to build reports in Google Sheets, use the writeback functionality, or access Ask Workday for Adaptive Planning.

Change Log

Multiple Segments for Report Organization

You can add multiple segments to group and organize different reporting elements such as accounts and levels within a single report. Currently you can add a maximum of 10 segments.

Persist Report Formatting

You can add formatted text to your Google sheets. The formatting persists even after you refresh the reports.

Editable Charts in Google Slides

When you use the **Export as Google Slides** option to download summaries, tables, and charts to a Google slide deck in your Google drive, we now:

- Download all responses by default.
- Enable you to edit the text or the charts on the slides using native Google slides functionality.
- Update a chart in Google Slides when you edit the same chart in Google Sheets.

Support for Keyboard Keys

When building reports, you can now use these keyboard keys to navigate and select elements from the element hierarchy:

- Shift plus click to select multiple elements.
- Up or down arrow keys to go up or down the element hierarchy.
- Right-arrow key to expand a parent element.
- Left-arrow key to collapse a parent element.

Duplicate Report

To create new reports, you can duplicate existing reports by copying a sheet to a new sheet in the same workbook.

The new report includes all the elements and metadata from the exiting report including:

- Expand states of elements
- Managed hierarchies
- Relative times
- Adaptive planning instance

Updated Production Date

We update the production date.

Workday for Google Sheets

We correct this note to inform you that this feature is currently released as limited availability. Accordingly, we have updated the **What Do I Need to Do?** section to include information about how to request the feature.

Related Information

[../././reporting-and-analysis/using-workday-for-google-sheets/concept--workday-for-google-sheets.dita](#)

2025R2 Planning for HCM and Financials Release Notes

Planning for HCM and Financials

These features require you to have additional SKUs related to Human Capital Management or Financials.

Headcount Planning Application: Top-Down Routing and Aggregate View

Preview Date: 2025-09-20. Production Date: 2025-09-20.

With this release, we enable you to configure your headcount planning process with a top-down routing of approvals. You can now use summarized views for preliminary headcount planning and initiate new planning cycles from existing headcount plans.

Business Benefits

This improves the efficiency, flexibility, and accuracy of headcount planning by providing a centralized and collaborative platform for managing planning cycles. It enables business leaders and broader business users to participate in the headcount planning process through connected data and business process.

By offering a summarized view of headcount, we streamline the preliminary planning process, saving time and reducing complexity for workforce planners and line of business leaders.

The ability to create new headcount plan events from existing plans provides greater agility, allowing organizations to adapt to changing business needs and initiate new planning cycles more efficiently.

Changes

On the Shared Participation step of the *Headcount Planning* business process, we:

- Rename the existing Manage Headcount Planning allowed action to Plan Headcount from Bottom Up.
- We add a new Plan Headcount from Top Down allowed action.

On the initial prompt page for the **Configure Headcount Plan** task, we:

- Add a new *New Headcount Plan Event* option that enables you to add a new plan event to an existing headcount plan.
- Remove the *Edit Existing Headcount Plan* option.

On the **Configure Headcount Plan** and **Create Headcount Forecast** tasks, we:

- Add a new **Select Views** section, enabling you to select which planning views to include on your headcount or headcount forecast plans.
- Add a new **Create an event for this headcount plan** check box.
- Add a new **Planning Organizations for This Event** section that we display after you select the new check box. This section includes a new **Routing** prompt, enabling you to select whether to plan from bottom up or top down.
- Reorder some of the existing fields.

When you view headcount or headcount forecast plans, we now display a new Aggregate View switch that enables you to view and edit the plan using grids with summarized numbers.

On the existing Organization View, we move the direct reports count from the graph node to the details pane.

We display the existing view, and new switch and view, when you view headcount or headcount forecast plans using these My Tasks items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

On the **View Headcount Planning Configuration** report, we:

- Add a new **Events** tab where you can add events, view events, and identify whether the events plan from bottom up or top down.
- Add a new **Headcount Plan Status** field on the **Headcount Plan** tab.
- Rename the existing **Headcount Plan Status** field on the **Headcount Plan** tab to **Background Job Status**.

We also add a new **Complete Headcount Plan** button on the report, enabling you to:

- Close all headcount planning events on this headcount plan.
- Make the headcount plan read-only.

We deliver a new **Participant for Subordinate Event** report field on the Headcount Planning Top Down Participant Detail Event business object (secured to the *Public Reporting Items* domain) that you can use in custom notifications. We also rename the existing **Manager for Superior Event** report field to **Participant for Superior Event**.

What Do I Need to Do?

On the Shared Participation step of the *Headcount Planning* business process, select *Plan Headcount from Top Down*.

Configure the workforce planning configuration manager feature with the *Use Plan and Execute Tasks* option selected.

To route My Tasks items to all planners and managers involved in the headcount planning process, assign them to security groups with access to these domains:

- *Participate: Headcount Planning* domain in the Adaptive Planning for the Workforce functional area. Gives view and modify access on headcount and headcount forecast plans to the plan participant security groups.
- (Optional) *Compensation Details: Headcount Planning* in the Adaptive Planning for the Workforce functional area. Gives view and modify access to users that need to view and modify compensation data on headcount plans and headcount forecast plans, and view data on reports. To enable users to change a position's supervisory organization, give those users modify access on both the current and new supervisory organization.

Ensure that you include all plan participant security groups on the Shared Participation Step of the *Headcount Planning* business process.

In Adaptive Planning, create these custom accounts with default formulas for the modeled sheet:

- Attrition. Use this case-sensitive code: REPORT_TERMINATION
- Ending Headcount. Use this case-sensitive code: REPORT_HEADCOUNT
- Filled. Use this case-sensitive code: REPORT_HEADCOUNT_FILLED
- Open. Use this case-sensitive code: REPORT_HEADCOUNT_OPEN
- Planned. Use this case-sensitive code: REPORT_NEW_HIRE
- Starting Headcount. Use this case-sensitive code: REPORT_STARTING_HEADCOUNT
- Target Cost of Workforce. Use this case-sensitive code: TARGET_COST_OF_WORKFORCE
- Target FTE. Use this case-sensitive code: TARGET_FTE
- Target Headcount. Use this case-sensitive code: TARGET_HEADCOUNT

What Happens if I do Nothing?

If you do nothing, you can continue to plan from the bottom up for your existing headcount plans.

If in progress headcount plans exist from before this feature delivers, you must now manually lock those plans versions in Adaptive Planning. Only headcount plans created after this feature delivers can use the new **Complete Headcount Plan** button.

Change Log

Participant Report Fields

We deliver a new report field and rename an existing report field. We omitted this change from the Wednesday publication of the 2025-09-20 service update.

Preview Date: 2025-09-20. Production Date: 2025-09-20.

Aggregate View

We update the note to document aggregate view updates to the Configure Headcount Plan task, Create Headcount Forecast task, the headcount and headcount forecast plans, and the View Headcount Planning Configuration report.

Preview Date: 2025-09-20. Production Date: 2025-09-20.

Headcount Planning Application: Top Down Routing and Aggregate View

We update this release note to change the feature title from "Top-Down Headcount Planning" to "Headcount Planning Application: Top Down Routing and Aggregate View." We now deliver this feature to your Preview tenant and update the Release Note Type from Coming Soon to Feature.

Preview Date: 2025-09-20. Production Date: 2025-09-20.

Related Information

[Steps: Set Up Headcount Planning](#)

Workforce Planning Configuration Manager

Preview Date: 2025-08-16. Production Date: 2026-09-11.

With this release, we continue to enhance your workforce planning configuration managers by addressing inconsistencies in the output values for multi-instance fields on the roster sheet.

Business Benefits

This addresses inconsistencies across integration runs.

Changes

Multi-instance report fields on rosters sheets now dynamically return the value with the lowest alphanumeric reference ID.

When you use the Manage Workforce Planning Configuration task to change a multi-instance report field on the roster sheet of an active workforce planning configuration manager, we now use an Extract Single Instance calculated field to return the value with the lowest alphanumeric reference ID.

What Do I Need to Do?

Make a change on your multi-instance report fields on your workforce planning configuration manager and activate the change.

What Happens If I Do Nothing?

If you do nothing, your existing and active workforce planning configuration managers with multi-instance report fields on roster sheets continue to return the values that they currently return. We only start returning the value with the lowest alphanumeric reference ID after the next time you change this report field on the workforce planning configuration manager and activate your changes.

OfficeConnect Labels

Preview Date: 2025-08-16. Production Date: 2025-09-20. Reversal Date: 2026-03-14.

We improve OfficeConnect for Financial Management.

Changes

We now introduce a new **Reference ID** label type value for most label types.

Business Benefits

Enables financial analysts or auditors to see audit related data points regarding the results of their financial reports.

What Do I Need to Do?

You must install the latest available version of OfficeConnect for the 2025R2 Release.

What Happens If I Do Nothing?

If you don't upgrade to the latest supported version of OfficeConnect, you will not see new Reference ID label type value.

Feature Reversal

Reversal Date: 2026-03-14.

We update this note to inform you that we're reverting this feature from Production to Internal. You must install the latest version of the OfficeConnect add-in to view the reversal.

OfficeConnect Messages and Alerts

Preview Date: 2025-07-04. Production Date: 2025-08-16.

For OfficeConnect for Financial Management, we now introduce, we now introduce Insightful error and warning messages for end users.

Changes

We now display warning messages to end users in OfficeConnect for dimensions that are dropped during model because they:

- Are missing reference IDs.
- Have duplicate reference IDs.
- Exceed 300K members.

Business Benefits

End users can:

- Report using a clean and fully functional reporting model.
- Stay informed on the current state of the reporting data.

What Do I Need to Do?

The messaging framework is available by default in the reporting model. However, you must install the latest version of OfficeConnect. See [Product Downloads](#).

What Happens If I Do Nothing?

If any pending issues aren't addressed in your reporting model, end users will continue to see error and warning messages. Also, if you're not on the latest version of OfficeConnect that supports the messaging framework, end users won't see any error messages for issues during model load. For example, if there are issues with dimensions, then they'll get dropped without any warning.

Central Place for Managing Reporting Models

Preview Date: 2025-08-16. Production Date: 2025-09-20.

We now enable you to view your model health and manage it from a central location.

Business Benefits

We enable you to:

- Stay informed on the status of your reporting model.
- Take any required actions as needed.

Changes

We provide a new Manage Reporting Models page that enables you to:

- Set your default reporting model.
- Create, edit, copy, or delete a reporting model.
- View individual model metrics.

To edit, copy, delete, or set a default reporting model, you must first click **OK** on the Manage Reporting Models page. Then, use the related actions menu next to each reporting data model name.

What Do I Need to Do?

Nothing. The Manage Reporting Models page is available by default in Workday.

What Happens If I Do Nothing?

Nothing happens.

Change Log

Feature Available in Preview

We update the Preview date for this feature. We also update the Tenant Status from Reversion to now Preview.

Feature Removed from Production Tenants

We revert this functionality from Preview and Production tenants.

Reversal Date: 2025-05-16

Support for Multiple Reporting Models

Preview Date: 2025-08-16. Production Date: 2025-09-20.

With this release, for OfficeConnect for Financial Management, Workday enables you to create up to 3 different reporting models.

Watch the video: 2m 40s

Changes

- We rename the:
 - **Set Up Financial Reporting and Analytics Data Model** domain to **Set Up Reporting Model**domain.
 - **Set Up Financial Reporting and Analytics Data Model** task to **Set Up Reporting Model**task.
 - **View Financial Reporting and Analytics Data Model**report to **View Reporting Model**report.
- You can:
 - Create or edit up to 3 different reporting models.
 - Provide a name and description for each reporting model.
 - Set the reporting model as the default, which will be used first for new workbooks.
- We provide these new administrative tasks:
 - Copy Reporting Model
 - Delete Reporting Model
- You can now use the existing **Clear Financial Reporting Caches**task to clear specific or all reporting model caches

Business Benefits

You can have different models for different groups in your organization with different dimensionality for financial analysis.

What Do I Need to Do?

- To create or edit reporting models as required for different groups in your organization, use the **Set Up Reporting Model** task.
- To copy a reporting model, use the **Copy Reporting Model** task and select a model to copy.
- To delete a reporting model, use the **Delete Reporting Model** task and select a model to delete.

What Happens If I Do Nothing?

You'll see no changes in Workday if you don't create additional reporting models.

Deployment Considerations

Object Transporter 2.0 supports moving models one at a time using reference IDs. Existing reference IDs in the target tenant will get updated and new ones created.

Change Log

Feature Available in Preview

We update the Preview date for this feature. We also update the Tenant Status from Reversion to now Preview.

Feature Removed from Production Tenants

We revert this functionality from Preview and Production tenants.

Reversal Date: 2025-05-16.

Unified User Provisioning and Authentication (UPA) for Workday Adaptive Planning

Preview Date: 2025-08-16. Production Date: 2025-11-21.

For customers using Adaptive Planning with Workday single sign-on (SSO), we now deliver a unified authentication and user provisioning experience.

Watch the video: 7m 45s

Changes

To support this enhancement, Workday has introduced the following changes:

- **User Provisioning Workspace (UPW):** A new workspace is available to configure and manage user provisioning for Workday Adaptive Planning.
- **User data migration:** A new migration task in User Provisioning Workspace enables you to update user instance assignment information in Workday. This process automatically generates the necessary security and provisioning groups.
- **Sign-in to Workday:** Enhanced authentication experience with a cleaner interface, improved security, and new password recovery options:
 - Updates to the native sign-in page.
 - Improved SMS enrollment flow.
 - New password reset option based on phone-number.
- **Sign-in to Adaptive Planning:** The sign-in process for users changes from Worklet-based to a sign-in that's specific to each Adaptive Planning instance. Users can sign in either through the Workday UI or the Adaptive Planning instance-specific URL (Vanity URL).

- **API Authentication:** The Adaptive Planning APIs now work with OAuth 2.0. You can authenticate to the Adaptive Planning APIs in exactly the same way you authenticate to Workday APIs.

Business Benefits

This feature provides a more streamlined and secure method for managing user access to Workday Adaptive Planning. Key benefits include:

- **Simplified administration:** Centrally manage user access to Adaptive Planning instances through security groups. Enhanced User Sync:
 - Real-time user sync for user-based security groups and hourly user sync for role-based security groups.
 - Option to trigger full user sync to correct user discrepancies.
 - Support for ISU users.
- **Automatic instance assignment:** Automate instance assignment through user sync configuration. You don't need to manually assign instances from the user profile or users list pages in Adaptive Planning.
- **Improved user experience:** Provide an enhanced and unified sign-in experience for users accessing Adaptive Planning.

What Do I Need to Do?

A Workday administrator needs to perform a one-time configuration and migration.

Note: To request this feature, contact your Named Support Contact to submit a Workday Customer Care request. After you configure UPA, you can't revert back to the previous configuration.

Prerequisites

- Workday to Adaptive Planning User Sync is configured. See [Steps: Set Up SAML SSO into Adaptive Planning for Synced Users..](#)
- Unified Access Management (UAM) is configured. See [Steps: Set Up Unified Access Management \(UAM\)](#).
- Security:
 - These domains in the System functional area:
 - *Unified Security Administration*
 - *Set Up: User Provisioning*
 - *Report: User Provisioning Status*
 - *Manage: Workday Adaptive Planning User Provisioning*
 - The Set Up: Adaptive Planning Group Sync domain in the Adaptive Planning functional area.
 - Adaptive Planning admin permissions:
 - *Admin Access > Users*
 - *Admin Access > Permission Sets*

Configuration Steps:

1. In Workday, configure access to User Provisioning Workspace (UPW). See [Steps: Set Up User Provisioning Workspace](#).
Security: Set Up: User Provisioning, Report: User Provisioning Status and Manage: Workday Adaptive Planning User Provisioning domains in the System functional area
2. On the Workday Home page, from the **Global Navigation Menu**, access the **Manage User Provisioning for Workday Products** worklet. Click **User Provisioning Workspace**.
3. From the **Products** page, for each of your Adaptive Planning instances, select **Configure**.

4. In the **Configuration** tab, click **Migrate**.

This task syncs Adaptive Planning instance assignments with UPW and automatically creates security and provisioning groups based on existing Adaptive Planning configurations.

5. Review the errors and click **Continue**.
6. Click **Preview and Approve**:
 - a. Use the **Generate Preview Report** to verify that all user information, security groups, and provisioning groups migrated correctly.
 - b. If the data is accurate, click **Approve**.
7. After completing the migration for all your Adaptive Planning instances, click **Enable Sync for Adaptive Products**.
8. Select the options to confirm that your current SSO to Adaptive Planning and User Sync will be disabled and new worklets will be created for each Adaptive Planning instance. Then, click **Confirm and Enable**.
9. Validate that users are synced into Adaptive Planning:
 - a. In Adaptive Planning, from the main menu, select **Administration**.
 - b. Under **Users and Permissions**, click the **Users** link.
 - c. On the users list page, check the **Last Sync Time** column.
10. In Workday, access the **Enable Adaptive Planning Setup for UPC** task and select the confirmation checkbox to switch over authentication to UPA. Click **OK**.
11. Authenticate to Adaptive Planning through UPA using either of these options:
 - On the Workday Home page, from the **Global Navigation Menu**, click **More** and then click an Adaptive Planning instance. You are logged in to Adaptive Planning using single sign-on (SSO).
 - In Adaptive Planning, from the main menu, click **Administration**. Next under **System**, click **General Setup**. Copy and paste the **Application URL** into a browser tab. If you're not authenticated, you need to authenticate to Workday.

After configuring UPA, you can access Adaptive Planning APIs in the same way that you access the Workday APIs:

1. In Workday, access the Register API Clients task to register your client in the Workday tenant. Set scope as Adaptive Planning and enter the other information. Use the generated client details to access the Adaptive Planning APIs.

For general information about registering API clients and generating access details, see [Steps: Configuring OAuth 2.0 for Your REST API Client](#).

2. Call the Adaptive Planning APIs using the Workday access token:

Example: XML-Based APIs:

```
POST https://api.adaptiveplanning.com/api/v40
<?xml version='1.0' encoding='UTF-8'?>
```

```
<call method="exportUsers" callerName="a string that identifies your
client application">
```

```
<credentials token="<ACCESS_TOKEN>" />
```

```
</call>
```

3. Example: REST APIs:

```
'Authorization': 'Bearer <ACCESS_TOKEN>'
```

What Happens If I Do Nothing?

If you do nothing, your existing user provisioning, single sign-on (SSO), and API integrations for Adaptive Planning will continue to function as they do today.

Change Log

Task Name Change

We have renamed the **Enable Adaptive Planning Setup for UPC** task to **Enable Adaptive Planning Authentication with UPAS**. We have also updated the acronym from Unified User Provisioning and Authentication (UPA) to Unified Provisioning and Authentication System (UPAS).

Preview Date: 2026-07-10. Production Date: 2026-07-24.

Unified User Provisioning and Authentication

This feature is now generally available.

Preview Date: 2025-08-16. Production Date: 2025-11-21.

2025R1 Release Notes

2025R1 Service Pack Release Notes

Release: 2025-06-13

- [Reset User Sync Mapping Between Workday and Adaptive Planning](#) : We deliver this feature to production.
- [Unified Access Management \(UAM\)](#) : We deliver this feature to production.

Release: 2025-07-11

- [Multicoordinate Support for Cell Explorer](#) : Coming Soon.

Release: 2025-06-13

- [Matrix Reports with Version Offset](#) : We deliver a new feature.
- [Rollup Mode for Custom Expansions in customReportValues API](#) : We deliver a new feature.
- [Automatic Transition to Replace Mode for Planning Data Loaders](#) : We deliver a new feature.
- [Machine Learning Predictive Forecaster](#): We update the note to document the new Auto-Detect Seasonality check box when you create or edit forecasts. We omitted this note from the Preview section of the 2025-06-13 service update.

Release: 2025-05-30

- [Headcount Planning Application: Refresh Plans from Actuals](#) : We deliver a new feature.

Release: 2025-05-09

- [Bottom-Up Workforce Planning](#): When you edit existing positions on your headcount or headcount forecast plans, we no longer display the Copy icon.
- [Planning Agent: Contextual Help](#) : We deliver a new AI feature.
- [Workday Assistant for Adaptive Planning](#) : We deliver a new AI feature.

Release: 2025-04-11

- [Machine Learning Predictive Forecaster](#) : We deliver a new feature.

- [Incora Connector to Adaptive Planning](#) : We deliver a new feature.
- [Headcount Planning Application: View and Approve by Company, Cost Center, or Custom Organization](#) : We deliver a new feature.

Adaptive Planning Notifications

Preview Date: 2025-02-08. Production Date: 2025-03-15.

With the 2025R1 release, we now display the notifications icon and page to all users.

Business Benefits

Notifications help you know when scenarios are shared without needing to navigate away from Adaptive Planning.

Changes

We now deliver the notification icon and notification page to all users. For this release we add notifications including notifications from sharable scenarios.

Introducing Shared Scenarios

Preview Date: 2025-02-08. Production Date: 2025-03-15.

We now enable you to share your personal scenarios with other collaborators. To establish workflows and to keep stakeholders informed, we provide automatic notifications for various new actions. We support these new roles:

- **Owners:** The person who creates the scenarios and shares it.
- **Collaborators:** The people who are invited to change data in the scenario.
- **Managers:** The person with the Manage Scenarios permission who can help with any workflow issues that arise due to changes in the organization, access rules, or permissions.

To support the workflow, we enable:

- Collaborators to check the status of submissions, download their changes, submit their changes, or recall their submissions.
- Owners to review the status of all collaborators and to download, accept, send back, or discard the changes.
- Managers to share and to, download, discard, and merge changes. We provide managers with these capabilities for both shared and personal scenarios to avoid blockages in the workflow.

Business Benefits

Shared scenarios improve collaboration, providing more visibility and input from stakeholders. This improves accuracy in your budgets and plans and saves time.

Automatic notifications increase the efficiency of communication and workflow, while keeping collaborators informed so that they can quickly complete their tasks.

Changes

Share Scenarios

We provide a new *Share* option in the Actions menu (the 3 dots next to the scenario in the scenario list). This enables scenario owners to:

- Pick individual users and groups to collaborate.
- Optionally select the Dashboard that has the data for the collaborators to review and change.
- Optionally add a Note to Collaborators with specific instructions or details.

After owners share scenarios, we enable collaborators to select the scenario, nested under the base version for sheets, reports, and dashboards. For collaborators, we provide these new options in the Actions menu of the scenarios list on the Scenarios page:

- *Submit for Review*: This option updates the status of the collaborator, sends a notification to the owner that changes are ready for review, and locks the sheets in the scenario for the collaborator.
- *Recall Submission*: This option is for cases where collaborators require additional changes or corrections. It reverses the status, unlocks the sheet, and notifies the owner.
- *View Collaborators*: This option enables collaborators to view a list of fellow collaborators and check the status of their submissions.

Manage Submissions

We provide managers and owners a new option, *Manage Submissions*, in the Actions menu of the scenarios list on the Scenarios page. This option enables them to view the list of collaborators, including the owner of the scenario. The list includes the status of each collaborator's contribution:

- *In Progress*: The collaborator has not finished the changes.
- *Submitted*: The collaborator has submitted the changes. To unlock the scenario for collaborator, you can send back the changes.
- *Approved*: The scenario owner has accepted the changes. We keep the sheets locked until the owner or manager merges or deletes the scenario.
- *Sent Back*: The owner sent back the scenario to the collaborator for additional changes. We unlock the sheets for the collaborator.

From the Actions menu, the 3 dots, in the Manage Submissions dialog box, we enable owners and managers to take these actions:

- *Download Changes*: Download an Excel sheet so you can review all the changes made by the collaborator or owner.
- *Discard Changes*: Discard the changes that the collaborator or owner made.

In the Manage Submissions dialog, we also provide these additional actions only for owners:

- *Approve* (checkmark icon): Accept the changes that the collaborator made.
- *Send Back* (x icon): Send back the scenario to the collaborator for additional changes. We provide an option to also discard all the collaborator's changes when you send back.
- *Approve All*: Accept all the changes of all collaborators, including themselves.

Scenario Notifications

To support an informed and seamless workflow, we now send notifications to owners and collaborators each step of the way. The notifications include:

- Scenario name.
- Name of the involved parties.
- Link to the perspective, if included, or the Scenarios page.
- Note, if provided.

We provide access to notifications with the bell icon in the toolbar of the application.

We send notifications to:

- Collaborators when managers or owners share scenarios.
- Owners when collaborators submit scenarios for review or recall submissions.
- Collaborators when owners or managers discard, accept, or send back changes.
- Owners when all collaborators finish submitting changes.
- Collaborators when owners or managers merge scenario changes into the base version.

For Adaptive Planning only instances, when your instance is set up for email notifications, we automatically send an email notification as well. For Adaptive Planning with HCM or Financials, we send notifications through both Adaptive Planning and Workday.

New Scenario Maximums and Guidance

We provide new maximums as guardrails that keep your model performing at its best:

- 2000 sheet saves per scenario across all users who have access to the scenario.
- 5,000 scenarios per instance.

We also recommend that you limit yourself to:

- 50 collaborators for each shared scenario. When you share with groups, be mindful of how many users are in the group.

With this release, we don't send notifications when you share the same scenario with over 100 users at a time.

Changes to Scenarios Page

We change the Scenario Management page to Scenarios. On the Scenarios page, we now provide new folders:

- **Shared:** We display all shared scenarios that you own or that others have shared with you.
- **Global:** We display this folder to scenario managers so that they can take actions on all scenarios in the instance, including the personal scenarios of others users and shared scenarios that weren't shared with the manager.

New and Changed Permissions

To support clarity and precision, we update permissions and add a new permission in the Permission Sets section of Administration.

- We add the new *Share Scenarios* permission that enables users to share their scenarios with collaborators. We make the *Create Scenarios* permission a prerequisite.
- We change the *Access Scenario Manager* permission to *Access Scenarios*.
- We update the capabilities of the *Manage Scenarios* permission. We make *Share Scenarios* permission, in addition to *Merge Scenarios* permission, a prerequisite.

We now enable users with the *Manage Scenarios* permission to:

- Access the Global folder on the Scenarios page.
- Share, merge, manage submissions, discard changes, and download changes for all scenarios.

We block users with the *Manage Scenarios* permission from:

- Viewing the scenario data in sheets, reports, and dashboards. We do enable them to download the changes to review them.
- Receiving notifications. We send all notifications to the owners and collaborators.
- Approving or sending back submissions. We do enable you to merge the changes.

If you manage Adaptive Planning security through Workday Core, you must manually enable the *Share Scenarios* action. For all other instances, we automatically enable the *Share Scenarios* permission for any permission set that has *Manage Scenarios*.

Imports and Exports

- We enable export scenarios data with Design Integrations and manual export.
- At this time, we don't support importing data with Design Integration loaders, APIs, or manually.

Other Enhancements to Support Shared Scenarios

- We update Audit Trail to track changes due to scenario merges by the user who made the change in the scenario. Previously, we only showed the name of the user who merged the scenario. We update the merge capability.
- You must have access to all the intersections of all changes in order to successfully merge. As a best practice, we recommend that you assign access rules, which provide *Edit* access to all data,

to at least 1 person who also has the *Manage Scenarios* permission. This practice prevents blockers from occurring in the shared scenario workflow.

- When you create a new version and opt to copy all scenarios, we convert any shared scenarios to personal scenarios.
- When collaborators submit shared scenarios for review, we automatically lock all sheets for the collaborator for the scenario. The scenario remains locked after the owner approves changes. We also display a tooltip for locked cells that includes the status of the scenario submission.

What's Coming Next

In an upcoming service package, we will support notifications for over 100 collaborators.

What Do I Need to Do?

We automatically add the *Share Scenarios* permission to any permission set with an active *Manage Scenarios* permission. If you manage Adaptive Planning security through Workday Core, you must manually enable the *Share Scenarios* action for Action Groups.

To enable *Share Scenarios* for an Adaptive Planning Permission Set:

1. Select Administration from the main menu.
2. Select Permission Sets.
3. Click Edit next to the permission set name.
4. Select *Share Scenarios*. If *Share Scenarios* is disabled, select *Create Scenarios* to enable it.
5. Select Submit.

To enable the action from Workday:

1. From Workday, run the *View Action Details* report.
2. Filter the Action column with *Manage Scenarios*.
3. Select an Action Group with the *Manage Scenarios* action.
4. Edit the action group.
5. Search for *Share Scenarios*.
6. Select *Share Scenarios* action.
7. Repeat for all Action Groups with the *Manage Scenarios* action.
8. (Optional) You can add the *Share Scenarios* action to Action Groups that don't have the *Manage Scenarios* action.

What Happens If I Do Nothing?

Users with the *Manage Scenarios* permission can start sharing scenarios.

For customers that use Workday core to manage Adaptive Planning security, no one can start sharing scenarios until you activate the action.

Forecast Explanations for Predictive Forecaster

Preview: 2025-02-08

We add a new feature, Forecast Explanation, to Machine Learning Predictive Forecaster. After your forecast runs with the feature enabled, we provide a chart and explanatory text enabling you to review and understand the factors that contributed to the forecasted data.

Business Benefits

Forecast Explanation helps demystify machine learning predictions. Visual representations make it easier for you to review and understand the factors that influenced each prediction.

Changes

We provide a new option, Forecast Explanation, in the Forecast section of new and edited forecasts. When you enable the Forecast Explanation check box, we provide these new items in the Confidence Metrics tab of the Forecast History page:

- Contribution Breakdown of Forecast Components: A visual representation of how seasonality, trend, and residual components (when applicable) contributed to the forecasted values.
- Forecast Explanation: Text describing the chart components.

You can access the Confidence Metrics when you view the history of a completed forecast.

What Do I Need to Do?

To enable the feature for existing forecasts:

1. From the main menu, select Modeling.
2. Select Predictive Forecaster.
3. Hover over the forecasts in the list to access the More Actions menu.
4. Click the 3 dots that display and select *Edit*.
5. In the Forecast section, select Forecast Explanation.
6. Select Run or Save to run it later.

To review the forecast explanations:

1. After the forecast runs successfully, select Modeling from the main menu.
2. Hover over the forecasts in the list to access the More Actions menu.
3. Click the 3 dots that display and select *View History*.
4. Select the Confidence Metrics tab.

What Happens if I Do Nothing?

The option is available for all new and existing forecasts.

What's Coming Next

We plan to deliver more details in the explanatory text and more charts to help you understand the influences and factors of the predicted data.

LightGBM Algorithm Supports Lever Sheets for Predictive Forecaster

Preview: 2025-02-08

We deliver the option to add lever sheets for forecasts using the LightGBM algorithm.

Business Benefits

LightGBM is ideal for demand forecasting scenarios. Now, with the ability to add regressor data to the reference data, you can influence your machine learning (ML) forecast. The values you enter in the lever sheet adjust the algorithm calculations that populate in the forecast.

Changes

We now provide the Lever Sheet drop-down prompt in the Algorithm section when you're creating or editing a forecast with the LightGBM algorithm. The prompt enables you to select up to 3 modeled sheets to use as levers.

What Do I Need To Do?

You can create new LightGBM forecasts and use lever sheets. Or you can add lever sheets to existing forecasts that use LightGBM:

1. From the main menu, select Modeling.
2. Select Predictive Forecaster.
3. Hover over the forecasts in the list to access the More Actions menu.
4. Click the 3 dots that display and select *Edit*.
5. In the Algorithm section, use the Lever Sheet prompt to add lever sheets to the forecast.
6. Select Run or Save to run it later.

What Happens if I Do Nothing?

The option is available for all new and existing forecasts that use algorithms that support lever sheets, which now includes LightGBM.

Machine Learning Predictive Forecaster

With this release, we enhance the user experience when you create and edit predictive forecasts. We also enable you to view predictive metrics on standard sheets for plan versions that you seeded with ML-generated data from a forecast.

Preview Date: 2025-04-11. Production Date: 2025-05-09.

Business Benefits

This makes it easier to create and edit predictive forecasts, and gives you more visibility on where your data came from and enables you to make more informed decisions about that data.

Changes

When you create or edit forecasts on the **Predictive Forecaster** page of **Model Management**, we add:

- A new **Auto-Detect Seasonality** check box.
- Tooltips for many fields and prompts.

When you select a version with data generated by a predictive forecaster on standard sheets, we now display the **Show Predictive Metrics** toolbar icon that enables you to view on cells with generated data:

- A purple triangle on the corner of the cell.
- Hover text with the forecast range and accuracy metrics.

If cells with generated data exist on a row, we display the purple triangle and hover text on all cells in the row. When you don't enable accuracy metrics on the predictive forecaster or no metrics exist, we disable the toolbar icon.

What Do I Need to Do?

When you create or edit your forecast, select the **Accuracy Metric** check box to generate a confidence level based on backtesting.

Related Information

[Setup Considerations: Predictive Forecaster](#)

[Create Machine Learning Forecasts](#)

Change Log

Auto-Detect Seasonality

We update the note to document the new **Auto-Detect Seasonality** check box when you create or edit forecasts. We omitted this note from the Preview section of the 2025-06-13 service update.

Preview Date: 2025-06-13. Production Date: 2025-07-11.

Modeled Sheet Data Validations

With this release, we continue to enhance your ability to use data validation rules for user-entered data on modeled sheet cells, enabling you to create more active validation rules.

Preview Date: 2025-02-08. Production Date: 2025-03-15.

Business Benefits

This gives you greater control over user-entered data on your modeled sheets.

Changes

On the **Data Validation Rules** page of your modeled sheet in **Model Management**, instead of restricting you to a maximum of 10 active validation rules, we now enable you to have up to 15 maximum active validation rules.

What Happens If I Do Nothing?

If you do nothing, you can continue to run the 10 or fewer active validation rules that already exist because that's still under the 15 rule maximum.

Related Information

[Set Up Modeled Sheet Data Validation Rules](#)

Reset to Default View on Sheets

With this release, we now enable you to reset your sheets back to the default view when the sheet is unable to load due to invalid filters and display option settings.

Preview Date: 2025-02-08. Production Date: 2025-03-15.

Business Benefits

This makes it easier to troubleshoot when you can't load your sheet.

Changes

When your sheets can't be loaded due to invalid filters and display option settings, we now enable you to select the **Reset to Default View** toolbar icon. We also clarify the error message that displays to tell you to either:

- Contact your administrator.
- Select the **Reset to Default View** toolbar icon.

Report Parameter Behavior

Preview Date: 2025-02-08. Production Date: 2025-03-15.

We now enhance report parameter behavior to provide consistency and automated selection for available choices.

Business Benefits

You can now:

- Create report parameters consistently, regardless of how you add them.
- Automatically include new values as available.

Changes

When you create new report parameters using levels, dimensions, and attributes:

- If all the values except the (only) and (uncategorized) are selected, then any new values are automatically selected as available choices.
- Irrespective of whether you add the parameters from the report filters or the report rows and columns, the behavior is now consistent.

What Do I Need to Do?

This feature only applies to all new reports. For any existing reports, you need to manually update the available parameter choices and save.

What Happens If I Do Nothing?

This feature only applies to all new reports. Any existing reports don't reflect the latest behavior.

Deployment Considerations

Review any existing report designs or administrative processes to see if you can take advantage of this functionality. This may eliminate the usage of "values only" type of Attributes that help filter out Uncategorized members.

Related Information

[Add Parameters to Matrix Reports](#)

Reporting in Billions

Preview Date: 2025-02-08. Production Date: 2025-03-15.

We now enable you to configure the magnitude of your reporting data to display numbers in billions for matrix reports.

Business Benefits

This feature enables you to report on larger magnitudes of data.

Changes

From your report properties, you can now configure the Magnitude option to display your reporting numbers in billions (compared to only millions previously).

What Do I Need to Do?

To display numbers in billions in your reports, from the **Numbers** tab of the Report Properties dialog, select the **Show in billions** magnitude.

What Happens If I Do Nothing?

If you do not set the report property to display numbers in billions, you'll not see any numbers in billions in your reports.

Related Information

[Change Element and Report Properties](#)

Report Bursting Through Scheduled Attachments

Preview Date: 2025-02-08. Production Date: 2025-03-15.

With this release, Workday enables you to schedule and distribute one report to multiple users using the recipient's data access. Each recipient receives their own slice of the report based on their access.

Business Benefits

Report recipients can review report results in the convenience of their email notification without having to navigate to the application.

Changes

You can:

- Schedule matrix and model reports as Excel attachments in email notifications. Recipients can then download the attached report from their email notifications.
- Schedule and distribute one report to multiple users using recipient's data access for up to 250 users in a single schedule.
- Distribute reports based on specific parameters or dimensions.

Example: You create a repeating report where you organize data using levels as sheet tabs. You also ensure that the report recipients have access to the data you intend for them to see. Next, you schedule to distribute this report based on the recipient's access. In this case, each recipient only sees data for the level or sheet tab that they have access to.

What Do I Need to Do?

You need to:

- Enable attachments with scheduled notifications from Administration, General Setup. After enabling the feature, you can schedule and distribute matrix and model report notifications with attachments. Optionally, you can enforce password protection on the schedule.
- Have these permissions assigned for scheduling reports:
 - *Create Report Schedules*
 - *Send Attachments in Notifications*
 - (Optional) *Manage all Report Schedules*
 - *Download to Excel* Both schedulers and recipients need this permission.
- Verify that email IDs exist for the notification recipients.
- Configure Notifications and create Notification Routing Rules to receive report notification emails with attachments from Workday-enabled Adaptive Planning instances. See [Steps: Set Up Workday Notifications](#).

What Happens If I Do Nothing?

If you don't turn on the Enable attachments with scheduled notifications feature, you'll see no changes in Adaptive Planning. The ability to schedule and distribute reports as attachments won't be available to you.

Deployment Considerations

- Consider including the password protection requirement, as these attachments are sending your data outside of Adaptive.
- Be mindful of the Access Rules your users are assigned to for the report. You can use the User Access Calculator found in Administration to check data intersections for a user.
- Consider using Global User Groups and Associations with Access Rules to help with security administration.

Related Information

See Release Note: [Send Scheduled Reports as Attachments](#).

Add Reports on Dashboards

Preview Date: 2025-02-08. Production Date: 2025-03-15.

We now enable you to add existing shared matrix reports on a dashboard to view it alongside related charts and sheets.

Watch the video: 2m 37s.

Business Benefits

When you share this dashboard with users, they see:

- The data to which they have access.
- An error message if they don't have access to the report.

Changes

You can add a report with a maximum of 1 million cells to a dashboard.

When viewing reports from dashboards, you can:

- Download and add report or line notes.
- Drill down by available dimensions.
- Drag and resize reports.
- Copy and paste reports within and across dashboards.
- Use grid mode to expand reports and view the full toolbar.
- Enable report parameters to sync with the dashboard perspective context filters.

What Do I Need to Do?

To add report on dashboards, you need these permissions assigned to you:

- *Access Dashboards > Edit Dashboards*
- *Access Reports*

When adding reports to dashboards, we recommend that you:

- Load a maximum of 4 reports at a time, 2 on each row. Where possible, add reports to other dashboards in a perspective.
- Assess the complexity of the reports as high dimensionality reports can cause slower performance.
- Add and load a report first before adding a second report.
- Add a maximum of 2 sheets on the dashboard.
- Sync a maximum of 10 report parameter types.

What Happens If I Do Nothing?

Without the required permissions, you can't add reports to dashboards.

Deployment Considerations

- If using dashboards to aid with the planning process, consider creating shared reports to include with the sheet or chart interaction. You might be able to simplify your dashboards or process tasks by including shared reports on the dashboards.
- Consider creating a Dashboards folder to place shared reports designed for use in dashboards.

Related Information

[Add Reports on Dashboards.](#)

[Concept: Best Practice Guidelines for Reports on Dashboards.](#)

Live Reports as Announcements**RETIREMENT**

Retirement Date: 2025-03-15

We plan to retire enabling you to include live reports as announcements.

Business Benefits

The functionality is no longer needed.

Changes

You can continue to create static HTML and text files as announcements. Alternately, you can use:

- Web report links on dashboards.
- Process tracker and process guide.

What Do I Need to Do?

We recommend that you use web links on dashboards.

Related Information

[Prepare for Retirement of Live Reports as Announcements](#)

Change Log

Live Reports as Announcements

We update this retirement to:

- Update the title.
- Update the retirement date from 2024-09-21 to 2025-03-15.
- Add more information to the Description and Related Links.

Live Reports as Announcements

We correct this note to update the release number.

Live Reports as Announcements

We originally communicated this retirement to you on 2023-09-08 with an expected retirement date of 2024-03-09. We now update the retirement date to 2024-09-21.

Matrix Reports with Version Offset

Preview Date: 2025-6-13. Production Date: 2025-6-13.

We now improve the performance for matrix reports with a version offset.

Changes

For matrix reports, if you use the version options in the element properties to offset a version either forward or backward by a time stratum, the report performance now improves.

Business Benefits

- Better user experience
- Faster performance

Chart Improvements in Dashboards

Preview Date: 2025-02-08. Production Date: 2025-03-15.

With the 2025R1 release, we improve the time display and selector in charts.

Business Benefits

The chart improvements make it easier to focus on the data and find all available chart actions.

Changes

We update the location of the time display in charts to the upper right corner by default. We also add the following fields in Appearance Settings:

- Show Time Period: We enable you to show or hide the time period on a chart.
- Position: We enable you to position the time period next to the chart name or under the chart name.

When you hover over a chart, the following icons now display above the chart:

- Reset to Default
- Select Time Period
- Expand
- Chart options

We moved all time period related actions in the new Select Time Period icon:

- Set the calendar stratum
- Time period and range
- Pin and unpin time

Perspective Folders in Dashboards

Preview Date: 2025-02-08. Production Date: 2025-03-15.

With the 2025R1 release, we now enable you to use folders to manage dashboard perspectives.

Business Benefits

Introducing folders for perspectives adds more ways to organize your perspectives.

Changes

You can now add folders with the new Folders icon to organize perspectives.

User Administration User Experience

Preview Date: 2025-02-08. Production Date: 2025-03-15.

With this release, we provide new user interfaces for the Administration landing and user management pages.

Business Benefits

The new UI pages improve the user experience and accessibility.

Changes

This feature was previously available as opt-in but now it's enabled by default.

From the new UI pages, we now provide:

- In-context actions menu to edit, email, and delete users.
- Real-time validation messages while editing user fields.
- Auto-population for some fields such as Salesforce username and NetSuite email.
- Improved pagination which maintains the original page state.

If you want to disable the new UI pages, you can clear these options from the Visual Preferences page under Administration:

- **Administration Landing**
- **Administration Users**

What Do I Need to Do?

Nothing.

What Happens If I Do Nothing?

You'll see the new administration UI pages by default.

Related Information

- [Create Users](#)
- [Reset or Unlock Passwords for Users](#)
- [Reference: Add User Fields](#)

Bring Your Own Key (BYOK) for Adaptive Planning

We now enable you to use your own AWS customer managed key (CMK) to encrypt your Adaptive Planning tenant database.

Production Date: 2025-03-15

Business Benefits

- Provides you greater control over your tenanted data stored in Adaptive Planning databases.
- Enhances security and enables you to protect your data with your own encryption keys.
- Aligns your data security practices with regulatory standards.
- Simplifies administration within your AWS environment.

Changes

Customers can now import, manage, and use their own encryption keys in their AWS Key Management Service (KMS) instance for encrypting and decrypting data within Adaptive Planning.

What Do I Need to Do?

Your Named Support Contact (NSC) must contact Workday support to enable the feature.

1. Purchase the BYOK SKU.
2. In the Workday Community, create a product support request under Adaptive Planning, Security & Administration.
3. Set the subject as "Request for BYOK Onboarding".

4. Provide these details using the support request record:

- a. As the key administrator, create the key for the primary region in your AWS KMS instance.
- b. Grant the Workday Adaptive Planning production AWS account (ID: 244702149041) usage access to the new key. Use the policy applied to the key to do this.
- c. Provide the Amazon Resource Name (ARN) to the key including the CMK ARN for each key (arn:aws:kms:<Region>:<ThirdPartyAWSAccountID>:key/<CMKID>).
- d. Key contact information for the Adaptive Planning Cloud Ops team for enabling the BYOK feature.

After Adaptive Planning provisions the database with the key, they will update you through the support case.

What Happens If I Do Nothing?

If you don't purchase the BYOK SKU, Adaptive Planning will continue to manage your keys for your encrypted data at rest.

Snowflake Support for Cloud Data Connect and Design Integrations

Preview Date: 2025-02-08. Production Date: 2025-03-15.

We now enable Snowflake in Cloud Data Connect and as a data source in Design Integrations.

Business Benefits

This simplifies the integration process, making it easy to directly load data from Snowflake into Adaptive Planning.

Changes

Snowflake displays as an option when you navigate to:

- **Integration > Setup Pipeline.**
- **Integration > Design Integrations** and select Create New Data Source.

Related Information

- [Concept: Data Sources](#)
- [Concept: Cloud Data Connect](#)

Incorta Connector to Adaptive Planning

With this release, we enable you to use Cloud Data Connect to create a pipeline to load Incorta data directly into Adaptive Planning standard or cube sheets.

Preview Date: 2025-04-11. Production Date: 2025-04-11.

Business Benefits

This simplifies the integration process, making it easy to directly load data from Incorta into Adaptive Planning.

Changes

We add the *Incorta* option when you create pipelines on the **Setup Pipeline** page of **Integration**.

What Do I Need to Do?

Download the table template when setting up the pipeline and provide it to your Incorta administrator. Verify they create a view to its specification before you run your pipeline task.

What Happens if I do Nothing?

To load Incarta data into Adaptive Planning standard or cube sheets without using this new pipeline, you can continue to either:

- Manually create a data source, loader, and task in Design Integrations.
- Use a Custom Cloud Data Source.
- Use other intermediary tools.

Related Information

Concept: [Cloud Data Connect](#)

Workday Adaptive Planning Data Agent Upgrade

Preview: 2025-02-08

With this release, we upgrade the Workday Adaptive Planning Data Agent to Java 11 and Pentaho Kettle PDI 9.3 for added security and long-term support.

Business Benefits

We maintain continued compatibility and support of your Pentaho Kettle scripts and plugins for Workday Adaptive Planning Data Agents.

Changes

We upgrade the Workday Adaptive Planning Data Agent to Java 11 and Pentaho Kettle PDI 9.3.

We update the Workday Adaptive Planning Data Agent to version v19.

What Do I Need to Do?

Verify that your Pentaho PDI scripts built in Pentaho 8.3 continue to function in Pentaho 9.3.

If you don't integrate with Pentaho:

1. Install Java 11. Workday recommends using the Azul Zulu JDK. <https://www.azul.com/downloads/?version=java-11-lts&os=windows&package=jdk#zulu>
2. Uninstall the existing Workday Adaptive Planning Data Agent.
3. Download and install the new Workday Adaptive Planning Data Agent.

If you integrate with Pentaho:

1. Install Java 11.

Workday recommends using the Azul Zulu JDK.

<https://www.azul.com/downloads/?version=java-11-lts&os=windows&package=jdk#zulu>

2. Install Pentaho 9.3, which requires Java 11.

The community edition is available here:

<https://hitachiedge1.jfrog.io/ui/native/pntpub-maven-release/org/pentaho/di/pdi-ce/9.3.0.0-428/>

Pentaho recommends the use of Pentaho 9.3 Enterprise Edition for Production instances. Engage with Pentaho to obtain the enterprise edition. Workday doesn't support the Pentaho installation process. Engage with Pentaho for installation support.

3. Migrate your scripts from Pentaho 8.3 to Pentaho 9.3 Workday doesn't support the script migration process. Engage with Pentaho for script migration support.

Note: While Pentaho aims for version compatibility of scripts, compatibility isn't guaranteed. Test your scripts after the upgrade, including testing for performance.

4. Uninstall the existing Workday Adaptive Planning Data Agent.

Install the new Workday Adaptive Planning Data Agent.

Specify Java 11 for the Java version and point to Pentaho 9.3 when prompted by the installer.

What Happens if I Do Nothing?

If you don't use Pentaho, the Workday Adaptive Planning Data Agent versions prior to 2025R1 (pre version 19.x) will continue to run as usual.

Data agents older than version 19.x won't be officially supported by Workday. If you raise an issue with Workday support, the support team may request upgrading the agent before further investigation.

If you use Pentaho, Workday Adaptive Planning Data Agent versions prior to 2025R1 (pre version 19.x) and their Pentaho 8.3 integrations will continue to run as usual.

Pentaho 8.3 won't be officially supported by Workday. If you raise an issue with Workday support, the support team may request upgrading the agent and Pentaho before further investigation.

Related Information

[../../../../integration/managing-data-integration/design-integrations/data-agents/bym1623710268391.dita](#)

Integration Tasks JSON Formatted REST API

This feature decreases implementation time and increases efficiency, making it easier to get information on Adaptive Planning integration tasks and trigger them.

Business Benefits

This covers use cases such as running tasks on a particular day, running tasks based on conditions, seeing the status of task runs and creating task workflows.

Changes

We deliver the Tasks v1 JSON Formatted REST API endpoint, enabling applications to:

- Get information about integration tasks, and integration task runs.
- Trigger an integration task.

See the API Changes by Release link under Related Information.

Related Information

- [../../../../integration/managing-data-integration/api-documentation/json-apis/service-tasks/tasks.dita](#)
- [../../../../integration/managing-data-integration/api-documentation/understanding-the-adaptive-planning-rest-api/vmo1623708512342.dita](#)
- [../../../../integration/managing-data-integration/design-integrations/tasks-and-schedules/qxu1623710215565.dita](#)

Rollup Mode for Custom Expansions in customReportValues API

Preview Date: 2025-06-13. Production Date: 2025-06-13.

We add a new rollup mode, 'X' to the custom expansion states within the customReportValues API. This new rollup mode enables you to specify the parent nodes within a dimension value that you want to expand to display immediate descendants and their associated data.

Changes

In customReportValues API, you will now see a new option, 'X', available in the rollup mode attribute. Selecting rollup mode 'X' enables the start-Expanded property, allowing you to specify the initial node(s) for hierarchy expansion.

Example: Your hierarchical structure includes:

- HQ with an ID of 1.
- Engineering with an ID of 2.

You can use rollup mode 'X' with start-Expanded set to "1,2". This expands the 'HQ' node and then continues expansion from the 'Engineering' node.

Business Benefits

- Provides greater control over how your data is presented in reports and analytics.
- Simplifies the process of configuring specific hierarchical expansions. Previously you could achieve this only using Matrix reports.
- Eliminates the need to create multiple separate elements using a different rollup mode ('C') to replicate this behavior.
- Saves you time and streamlines your report definitions.

What Do I Need to Do?

For parent dimensions that you want to display as expanded, you must:

1. Select the X option for the rollup-mode attribute.
2. Specify the IDs in the start-Expanded property.

What Happens If I Do Nothing?

There's no change to existing behavior. You won't be able use the custom expansion feature for rollup-mode.

Planning Agent: Contextual Help

Preview Date: 2025-05-09.

With this release, we introduce the Contextual Help skill of the Planning Agent. Contextual Help:

- Is an AI feature available within the Workday Assistant for Adaptive Planning.
- Provides a conversational interface to enable you to quickly access information from Adaptive Planning documentation.

Changes

You can use Contextual Help to:

- Ask questions in natural language and access relevant help exactly when needed.
- Receive concise, context-aware answers without disrupting your workflows.
- Use a "Help me find an answer" prompt on the Workday Assistant for Adaptive Planning welcome screen to discover relevant questions.

Benefits

This feature:

- Streamlines access to Adaptive Planning information by combining comprehensive search with contextual analysis.
- Provides centralized support and assistance with critical tasks such as:
 - Setting up an alternate calendar or ML forecast
 - Reviewing scenario changes
 - Changing default currencies

- Boosts productivity and reduces dependency on support teams by making learning intuitive and seamless.

What Do I Need to Do?

Assign the *Access Ask Workday for Adaptive Planning* permission to end-users so they can access and use the Contextual Help capability from the Workday Assistant.

Note: As of the 2025R2 release, we have renamed the Workday Assistant to Ask Workday for Adaptive Planning (Ask Workday). See [Ask Workday for Adaptive Planning](#).

What Happens If I Do Nothing?

You'll see no changes in Adaptive Planning. You won't have access to the Contextual Help capability of the Workday Assistant (Ask Workday)

Change Log

Updates and Clarifications

We further clarify the content in these sections:

- What Do I Need to Do?
- What Happens if I Do Nothing?

Also, we rename the *Access Workday Assistant for Planning* permission to now *Access Ask Workday for Adaptive Planning*.

Feature is Now Generally Available

We update this note to inform you that this feature is now generally available as of the 2025R2 release. You no longer need to submit Limited Availability form. You can access this feature by default from the Ask Workday for Adaptive Planning AI feature. See [Ask Workday for Adaptive Planning](#).

Planning Agent: Contextual Help

We update this note to correct the Tenant Status.

Updated Instructions for Requesting Feature

We update the instructions in the **What Do I Need to Do?** section for accuracy.

Automatic Transition to Replace Mode for Planning Data Loaders

With this release, we begin to automatically transition all tenants from erase and append configurations for planning data loaders to replace mode.

Preview Date: 2025-06-13. Production Date: 2025-06-13.

Business Benefits

Unlike erase and append configurations, which deletes all data before it uploads new data, replace mode:

- Updates values that changed.
- Adds new data.
- Removes data not present in your import.

Replace mode enables you to:

- Improve import performance by increasing the speed and efficiency of data updates using streamlined processing.
- Reduce audit logs by generating minimal audit logs, leading to a cleaner and more efficient system.
- Use targeted data handling to ensure data accuracy and consistency through intelligent updates that only affect changed, new, or removed data, and leaving unchanged data untouched.

Changes

If you currently use simple erase and append configurations on the **Erase Settings** tab on planning data loaders for standard and cube sheets, we automatically:

- Select **Enable Replace Mode** on the **Data Source Settings** tab.
- Remove the **Erase Settings** tab.
- Disable the *Erase manually* option.

Once we confirm that no active planning data loaders in your tenant use erase and append configurations, we remove the **Erase Settings** tab from your tenant.

What Happens If I do Nothing?

If the erase mode scope of your loader is the same as the append mode scope, we automatically update the loader to use replace mode. Loaders with any other configuration won't be affected.

Related Information

[Create Planning Data Loaders](#)

Workday Assistant for Adaptive Planning

Preview Date: 2025-05-09.

The Workday Assistant for Adaptive Planning (Assistant) introduces an AI interface that enables users to interact with Adaptive Planning using natural language.

Changes

The new AI interface:

- Provides seamless and universal access to the Assistant from the global header on all application pages.
- Offers Planning Agent capabilities with context-aware suggestions and pervasive support across the application.
- Ensures a consistent and user-friendly Workday Assistant experience with an updated and improved user interface.

Business Benefits

- Enables faster, more strategic decisions by uncovering insights and suggesting next steps in context.
- Boosts productivity and user adoption by making advanced planning tools intuitive, conversational, and accessible to all skill levels.

What Do I Need to Do?

Verify that the Planning Agent: Contextual Help feature is enabled for your instance which automatically enables the Workday Assistant for Adaptive Planning. See [Planning Agent: Contextual Help](#).

What Happens If I Do Nothing?

You'll see no changes in Adaptive Planning. You won't have access to the Workday Assistant for Adaptive Planning feature.

Change Log

Workday Assistant for Adaptive Planning

We correct this note to update the Tenant Status.

2025R1 Planning for HCM and Financials Release Notes

Planning for HCM and Financials

These features require you to have additional SKUs related to Human Capital Management or Financials.

Headcount Planning Application: Organizational View

With this release, we enable you to use an organization hierarchy chart to view larger, summarized populations of people when you perform bottom-up, position-level workforce planning.

Preview Date: 2025-02-08. Production Date: 2025-03-15.

Business Benefits

This makes it easier to understand what your future people structure looks like and provides supporting content for business conversations around position approvals.

Changes

We add a new switch that enables you to switch the way you view your headcount or headcount forecast plan between:

- A grid with individual position details.
- A new organization hierarchy chart with summarized position details.

We add the new switch in the upper-right corner of your page when you view headcount or headcount forecast plans using these My Tasks items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

What Do I Need to Do?

The organizational view only supports the organization type defined as the Level.

What Happens if I do Nothing?

If you do nothing, you can continue to view and plan using a table with individual position details.

Change Log

Headcount Planning Application: Organizational View

We update this release note to change the feature title from "Bottom-Up Workforce Planning: Organizational View" to "Headcount Planning Application: Organizational View."

Preview Date: 2025-02-08. Production Date: 2025-03-15.

Correction for Create and Edit Positions in Chart View

We correct this note to clarify the Changes section and remove mention of the ability to create and edit positions in the organizational chart view.

Preview Date: 2025-02-08. Production Date: 2025-03-15.

Related Information

[Complete Headcount Planning Participant Detail Events](#)

Headcount Planning Application: Hierarchical Routing

With this release, we enable you to route up your organization hierarchy for your headcount and headcount forecast plans when you perform bottom-up, position-level workforce planning.

Preview Date: 2025-02-08. Production Date: 2025-03-15.

Business Benefits

This extends your bottom-up workforce planning activities up your organization hierarchy so that upper-level managers can review and modify their team's headcount plans.

Changes

When you select top level hierarchy and supervisory organizations to include on these tasks, we now use the hierarchy structure to route My Tasks items for the headcount and headcount forecast plans to supervisory organization members:

- **Configure Headcount Plan**
- **Create Headcount Forecast**

We also add a new **Your Assigned Planning Organizations** field on the My Tasks items that displays: The planning organizations that are assigned to you. The planning organizations that you inherit.

When a planner submits on their My Tasks item, we now send a My Tasks item to the next supervisory organization owner above this planner who has access to the headcount or headcount forecast plan. We now restrict superior plan participants from submitting before all subordinate plan participants submit.

We deliver a new **Manager for Superior Event** report field on the Headcount Planning Participant Detail Event business object (secured to the *Public Reporting Items* domain) that you can use in custom reports and business process rules for the person who manages the Headcount Planning Participant Detail Event that's superior to this event.

What Do I Need to Do?

To route My Tasks items to all planners and managers involved in the headcount planning process, assign them to security groups with access to these domains:

- *Participate: Headcount Planning* domain in the Adaptive Planning for the Workforce functional area. Gives view and modify access on headcount and headcount forecast plans to the plan participant security groups.
- (Optional) *Compensation Details: Headcount Planning* in the Adaptive Planning for the Workforce functional area. Gives view access to users that need to view compensation data on headcount plans, headcount forecast plans, and reports.

Ensure that you include all plan participant security groups on the Shared Participation Step of the *Headcount Planning* business process.

What Happens if I do Nothing?

If you do nothing, any existing headcount and headcount forecast plans still in progress retain the flattened routing. Any new headcount and headcount forecast plans that you create will use the new organization hierarchy routing behavior.

Change Log

Headcount Planning Application: Hierarchical Routing

We update this release note to change the feature title from "Bottom-Up Workforce Planning: Hierarchical Routing" to "Headcount Planning Application: Hierarchical Routing."

Preview Date: 2025-02-08. Production Date: 2025-03-15.

Related Information

[Steps: Set Up Headcount Planning](#)

Headcount Planning Application: View and Approve by Company, Cost Center, or Custom Organization

With this release, we enable you to plan by company, cost center, or custom organization when you perform bottom-up, position-level workforce planning.

Preview Date: 2025-04-11. Production Date: 2025-09-20.

Business Benefits

This enables you to plan using an organization hierarchy that best suits your organizational needs.

Changes

We now enable you select a company hierarchy, cost center hierarchy, or custom organization hierarchy on the **Level** page of the **Manage Workforce Planning Configuration** task. We support planning by cost center or custom organization when you select either:

- *Plan in Adaptive Planning*
- *Use Plan and Execute Tasks*

When you create a headcount or headcount forecast plan that uses company hierarchy, cost center hierarchy, or custom organization hierarchy, we change the **Supervisory Organizations** field to **Planning Organizations**. We change the field on these tasks:

- **Configure Headcount Plan**
- **Create Headcount Forecast**

When you view headcount or headcount forecast plans that use company hierarchy, cost center hierarchy, or custom organization hierarchy, we change the **Supervisory Organization** field when you view headcount or headcount forecast plans using these My Tasks items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

When you create or edit positions on your headcount or headcount forecast plans that use company hierarchy, cost center hierarchy, or custom organization hierarchy, we change the **Supervisory Organization** field to **Planning Organization**.

You can now select positions that use company hierarchy, cost center hierarchy, or custom organization hierarchy on the **Execute Headcount Plan** task.

When you view headcount or headcount forecast plans that use company hierarchy, cost center hierarchy, or custom organization hierarchy on the **View Headcount Planning Configuration** report, we change the **Supervisory Organization** field to **Planning Organization**.

We deliver a new **Position Passes All Level and Dimension Filters** report field on the Plan Executable business object (secured to the *Set Up: Adaptive Planning* domain) that you can use in custom reports for positions that meet these criteria:

- Passes all Advanced Filters.
- Passes Top Level Hierarchy, Include, and Exclude filters configured on the planning configuration manager for all levels and dimensions.
- The level selected on the planning configuration manager isn't empty.

We deliver a new **Level** report field on the Headcount Plan Line Details business object (secured to the *Public Reporting Items* domain) that you can use in custom reports for the level instance for this position.

What Do I Need to Do?

Ensure that your custom organization is configured with **Allows Hierarchy** on the **Maintain Organization Types** task.

To support creating positions on the **Execute Headcount Plan** task for cost center and custom organization headcount plans, select *Supervisory Organization* as a required dimension on the **Configure Headcount Plan** task.

To route My Tasks items to all planners involved in the headcount planning process, assign them to security groups with access to these domains:

- *Participate: Headcount Planning* domain in the Adaptive Planning for the Workforce functional area. Gives view and modify access to the plan participant security groups.
- (Optional) *Compensation Details: Headcount Planning* in the Adaptive Planning for the Workforce functional area. Gives view access to users that need to view compensation data on headcount plans, headcount forecast plans, and reports.

Ensure that you include all plan participant security groups on the Shared Participation Step of the *Headcount Planning* business process.

What Happens if I do Nothing?

If you do nothing, you can continue to plan by supervisory organization for your headcount and headcount forecast plans.

Change Log

Headcount Planning Application: View and Approve by Company, Cost Center, or Custom Organization

We update this release note to change the feature title from "Bottom-Up Headcount Planning: View and Approve by Company, Cost Center, or Custom Organization" to "Headcount Planning Application: View and Approve by Company, Cost Center, or Custom Organization."

Preview Date: 2025-04-11. Production Date: 2025-09-20.

Related Information

[../../../../admin-guide/en-us/manage-workday/organizations/dan1370797385852.dita](#)

[Steps: Set Up Headcount Planning](#)

Headcount Planning Application: Refresh Plans from Actuals

With this release, we enable you to refresh actuals in your working headcount plan when you perform bottom-up, position-level workforce planning.

Preview Date: 2025-05-09. Production Date: 2025-09-20.

Watch the video: 3m 9s

Business Benefits

This reduces or eliminates reconciliation issues by enabling you to refresh plan and ensuring plan actuals are in-sync with HCM actuals at the time of plan approval.

Changes

We add a new **Refresh Actuals** button on your headcount and headcount forecast plans that enables you to refresh Human Capital Management (HCM) actuals into your plan. We display the new button on the Headcount Planning Event My Tasks items that we route to plan controllers. When you refresh your headcount or headcount plan, we don't automatically update the baseline plan version in Adaptive Planning.

Above the grid of your headcount and headcount forecast plans, we add text above the grid that tells you when you last merged HCM actuals into your plan.

We add new icons next to each position row that tell you if the position:

- Is a new position created because of an HCM data merge.

- Was changed because of an HCM data merge.
- Has effective dated changes.

We only display the icons if these scenarios apply to the position.

When you click on an icon that indicates a position was changed because of an HCM data merge or the position has effective dated changes, we now display a new modal with grids that tell you:

- The position's current values. The position's planned changes.
- We highlight the grid cells that have changes.

We add the new text, icons, and button when you view headcount or headcount forecast plans using these My Tasks items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

What Do I Need to Do?

Your headcount and headcount forecast plans are refreshed based on the actuals from your workforce planning configuration manager. For effective refresh actuals, new actuals must exist from your workforce planning configuration manager since you created the headcount or headcount forecast plan.

What Happens if I do Nothing?

If you do nothing, you can continue to plan without merging your HCM actuals into your headcount and headcount forecast plans.

Change Log

Headcount Planning Application: View and Approve by Company, Cost Center, or Custom Organization

We update this release note to change the feature title from "Bottom-Up Headcount Planning: Refresh Plans from Actuals" to "Headcount Planning Application: Refresh Plans from Actuals."

Preview Date: 2025-05-09. Production Date: 2025-09-20.

Related Information

[Complete Headcount Planning Participant Detail Events](#)

Headcount Planning Application

With this release, we continue to enhance your bottom-up, position-level workforce planning experience by ensuring that you set up your headcount planning integration system user, displaying additional validation messages, clarifying the headcount planning background job statuses, and removing some automatically populated default values on roster sheet columns from the workforce planning configuration manager.

Preview Date: 2025-02-08. Production Date: 2025-03-15.

Business Benefits

By ensuring that you set up your headcount planning integration system user, this feature helps prevent downstream issues when you create your headcount and headcount forecast plans. The additional validation messages help you troubleshoot and prevent downstream issues when you create plans. The clearer background job statuses help you troubleshoot by giving you more information about what happened after you try to create headcount and headcount forecast plans. By removing some automatically populated default values on roster sheet columns, we give you more flexibility and control over how you plan.

Changes

We now require you to select an integrated system user for headcount planning on the **Headcount Planning** tab of the **Adaptive Planning** tab on the **Tenant Setup** report.

On the **Roster Sheet** page of the **Manage Workforce Planning Configuration** task, we no longer automatically populate the **Field** values of these columns:

- **Availability Date**
- **Default Compa-Ratio**
- **Default Primary Compensation Basis - Amount**
- **Requisition Compensation Grade**
- **Total Default Base Pay - Amount**
- **Total Default Base Pay - Currency**

On the initial prompt page of these tasks, we now display an error message if no headcount planning integration system user exists:

- **Configure Headcount Plan**
- **Create Headcount Forecast**

On the **Configure Headcount Plan** task, we also display an error message if no active workforce planning configuration manager exists to use to configure a headcount plan.

On the **Create Headcount Forecast** task, we also display an error message if no approved headcount plan exists to use to create a headcount forecast.

On the **View Headcount Planning Configuration** report, we clarify the background job statuses that display after you try to create headcount and headcount forecast plans.

We no longer display the **Copy** icon when you access headcount or headcount forecast plans using these My Tasks items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

Note: We don't change or remove the selected **Field** values on the roster sheet columns of any existing workforce planning configuration managers.

Change Log

Headcount Planning Application

We update this release note to change the feature title from "Bottom-Up Workforce Planning" to "Headcount Planning Application."

Preview Date: 2025-02-08. Production Date: 2025-03-15.

Copy Icon

When you edit existing positions on your headcount or headcount forecast plans, we no longer display the **Copy** icon.

We no longer display the **Copy** icon when you access headcount or headcount forecast plans using these My Tasks items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

Preview Date: 2025-05-09. Production Date: 2025-05-09.

Additional Error Messages

We update the note to document additional error messages on the **Configure Headcount Plan** task and **Create Headcount Forecast** task.

Preview Date: 2025-02-08. Production Date: 2025-03-15.

Clearer Statuses on View Headcount Planning Configuration Report

We update the note to document an update to the status messages that we display on the **View Headcount Planning Configuration** report after you try to create headcount or headcount forecast plans.

Preview Date: 2025-02-08. Production Date: 2025-03-15.

Remove Automatically Populated Values from Roster Sheet Columns

We update the note to document that we remove some automatically populated default values from roster sheet columns.

Preview Date: 2025-02-08. Production Date: 2025-03-15.

Related Information

[Steps: Set Up Headcount Planning Integration System User](#)

[Create Headcount Plans](#)

[Create Headcount Forecast Plans](#)

Reporting Model Size Limit

Preview Date : 2025-01-17. Production Date: 2025-03-15

We now introduce a limit on the size of the reporting model that users can load in OfficeConnect for Financial Management.

Business Benefits

The new limit on the model size ensures better performance and user experience in OfficeConnect.

Changes

We now support a maximum of 750K dimension members for the entire reporting model. If your model exceeds this limit, end users can't successfully load it in OfficeConnect.

What Do I Need to Do?

Nothing. The new limit is enforced during model load in OfficeConnect.

What Happens If I Do Nothing?

If your reporting model exceeds the size limit, it fails to load in OfficeConnect. An administrator must reduce the model size by either:

- Removing a large dimension.
- Selecting a lower level in the dimension hierarchy.

Historical Data in the Reporting Model

Preview Date: 2025-02-08. Production Date: 2025-03-15.

We now enable you to report on 5 years of historical data in OfficeConnect for Financial Management.

Business Benefits

By reporting on additional historical years, you can:

- Track historical trends.
- Support end-of-year closing.
- Do ad hoc historical analysis.

Changes

You can now report on 5 years of historical data (3 more than previously) in OfficeConnect for Financial Management.

What Do I Need to Do?

Nothing. The additional historical years are available by default in the reporting model.

What Happens If I Do Nothing?

Nothing happens.

View Reporting Model Configuration History Report

Preview Date: 2025-02-08. Production Date: 2025-03-15.

We deliver a new View Reporting Model Configuration History report (secured to the Set Up: Financial Reporting and Analytics Data Model domain), enabling you to track configuration changes to the reporting model. This report is available to only OfficeConnect for Financial Management.

Business Benefits

The report enables you to track any changes to the reporting model configuration.

Changes

You can use the Reporting Model Configuration History report to track any changes to the reporting model members including:

- Company
- Ledger Accounts
- Time
- Currency
- Versions
- Effective Date
- Dimensions
- Show Details

What Do I Need to Do?

Nothing. The report is available by default in Workday.

What Happens If I Do Nothing?

Nothing happens.

Support for Accounting Center Data in OfficeConnect for Financial Management

Preview Date: 2025-02-08. Production Date: 2025-03-15.

For OfficeConnect for Financial Management, we now enable you to report on these data stored in Prism data sources:

- Accounting Center data
- Other ledger-like data

Watch the video: 9m 20s

Business Benefits

OfficeConnect for Financial Management users can now:

- Report on Accounting Center and ledger-like Prism data sources.
- Do comparison analysis using Workday-delivered and custom versions.

Changes

For Financial Management customers, we now provide these new tasks secured to the Set Up Reporting Model domain:

- Create Field Mapping for Reporting Model.
- Edit Field Mapping for Reporting Model.
- View Field Mapping for Reporting Model.
- Create Custom Fields.
- Create Custom Version.

We update the Set Up Reporting Model task for configuring versions:

- In the **Versions** section, you can configure the Accounting Center Journals version and other custom versions to include Prism data. We currently support up to:
 - 10 custom versions and 10 data sources per version.
 - 15 Billion rows per version.
- In the **Show Details** section, you can configure fields for each custom version, such as Accounting Center Journals, for the Show Details option in OfficeConnect.
- In the **Dimensions** section, you can add dimensions that are applicable to the Prism data sources you configure.

What Do I Need to Do?

To enable reporting on Accounting Center and Prism data, you must:

1. Map fields from your Prism data source to the reporting model data source using the **Field Mapping for Reporting Model** task.
2. (Optional) Create any tenanted fields that currently aren't available to the reporting model using the **Create Custom Fields** task. Also, you must then map these fields to the reporting model data source.
3. During mapping, specify the version associated with the Prism data source:
 - To specify a single version for all records in the data source, use the **Create Custom Version** task.
 - To assign different versions to different records in the Prism data source, select a source field from the Prism data source.
4. Configure the reporting model to include the mapped prism data as versions using the Set Up Reporting Model task.

End users can then see the Accounting Center and prism data as versions in OfficeConnect for Financial Management. They must have access to all the data sources configured for a given version.

What Happens If I Do Nothing?

You'll see no changes in Workday if you haven't set up this feature. The field mappings and related versions won't be available to your reporting model.

End users won't see Accounting Center or other custom versions for Prism data in OfficeConnect for Financial Management.

Commitment and Obligation Ledgers as Versions

Preview Date: 2025-02-08. Production Date: 2025-03-15

For OfficeConnect for Financial Management, administrators can now configure additional versions and corresponding Show Details fields for these versions.

Business Benefits

You can now report on Commitment and Obligation Ledgers, also known as Pre-encumbrance or Encumbrance ledgers in OfficeConnect for Financial Management. These ledgers are typically used in Education and Government industries.

Changes

In the Set Up Reporting Model task, administrators can now configure:

- Additional versions for:
 - Commitment Ledger
 - Obligation Ledger
- Show Details fields specifically for these Versions.

What Do I Need to Do?

To use the Commitment and Obligation Ledgers:

1. Run the **Set Up Reporting Model** task.
2. From the **Versions** section, add the ledgers as versions.
3. (Optional) Configure Show Details for each version

End users can then see these versions as elements in OfficeConnect.

What Happens if I Do Nothing

Commitment and Obligation Ledgers will not be available for reporting in OfficeConnect for Financial Management.

Change Log

We incorrectly reported that this functionality delivered to Preview on 10-25-2024. We plan to deliver this functionality to Preview and Production in a future update.

Related Information

[Concept: The Financial Reporting Data Model](#)

OfficeConnect Dimension Limits

Preview Date: 2025-02-08. Production Date: 2025-03-15.

For OfficeConnect for Financial Management, we now introduce:

- A total model member limit in the Set Up Reporting Model task.
- Increased per dimension member limit from 100k to 300k.

Business Benefits

End users can report on larger dimensions.

Changes

The Set Up Reporting Model task now supports a maximum of 300K members per dimension and a maximum of 750k members for the entire model. You're unable to successfully save the model setup if you exceed either of these limits.

What Do I Need to Do?

Nothing. The new limits are available by default.

What Happens If I Do Nothing?

If your reporting model exceeds either of the limits, you're unable to successfully save it.

Support for Alternate Account Sets and Fiscal Schedules

Preview Date: 2025-02-14. Production Date: 2025.05-02.

With this release, for OfficeConnect for Financial Management, Workday enables you to configure each reporting model with its own account set and fiscal schedule. End users can then report on alternate ledger accounts and fiscal schedules.

Business Benefits

- Meet local statutory reporting requirements using alternate account sets and fiscal schedules configured in separate reporting models.
- Use the primary or corporate account sets in a separate model for consolidation.

Changes

In the Set Up Reporting Model task:

- We now populate the options for Account Set and Fiscal Schedule fields based on the company accounting details of the companies in the company hierarchy that you select:
 - If all companies in the hierarchy consistently use the same account set (primary or alternate), we populate the related account set as an option you can select.
 - If all companies in the hierarchy consistently use the same fiscal schedule (primary or alternate), we populate the related fiscal schedule as an option you can select.
- If the Ledger Account is set to an alternate account set, then the Account Field option for Actuals (Journal Lines), Commitment, and Obligation versions is set to Alternate Ledger Account.
- The Account Field option for the Plan Lines version is always set to Ledger Account irrespective of the account set.
- The Account Field option for all other Versions is set to Ledger Account. If needed, you can change the account field.
- The account set and fiscal schedule that you select for a reporting model drives the account fields and time periods that end users can select for reporting.

What Do I Need to Do?

You must configure:

- Alternate account sets and mapping rules.
- Alternate fiscal schedules.
- A separate reporting model with the appropriate account set and fiscal schedule for local statutory purposes. This is different from the one available for your consolidation needs.

In the reporting model where you configure alternate ledger accounts, we recommend that you add the alternate accounts for Show Details.

What Happens If I Do Nothing?

You'll see no changes in Workday if you don't create additional reporting models.

Related Information

- [Steps: Set Up Alternate Accounts](#)
- [Steps: Set Up Alternate Fiscal Year Consolidations](#)

Change Log

Feature Removed from Production Tenants

We revert this functionality from Preview and Production tenants.

Reversal Date: 2025-05-16

Reset User Sync Mapping Between Workday and Adaptive Planning

Preview Date: 2022-11-11. Production Date: 2025-06-13

To maintain data integrity with user sync mapping, we deliver a new **Reset User Sync Mapping with Adaptive Planning** task (secured to the Security Administration domain).

Changes

You can use the task to clear the synced mapping for users in Workday. Then you can run these tasks to enable users to sign in to Adaptive Planning:

- Pre-sync: Sends user accounts from Adaptive Planning to Workday.
- Sync: Sends the Workday ID for each account from Workday to Adaptive Planning.

You can access these tasks from the **Tenant Setup Report > Adaptive Planning > User Sync** tab.

Note: We now deliver this feature to Production tenants.

Unified Access Management (UAM)

Preview Date: 2024-08-17. Production Date: 2025-06-13

We now enable Workday Adaptive Planning customers to:

- Create Adaptive Planning permission sets (action groups) in Workday.
- Assign permission sets to users based on security groups in Workday.
- Sync Workday security groups into Adaptive Planning to manage user access across the application.

Business Benefits

By centrally managing security groups in Workday, administrators can automate:

- Permission set assignment.
- User access to reports, dashboards, modeling, and other application areas.

Changes

You can manage permissions and access for synced Adaptive Planning users from Workday.

When users are assigned to synced Workday security groups, we now include those groups when we send notifications in these areas:

- Processes.
- Reports.

You can now view and select these groups when you:

- Assign process tasks.
- Send notifications to process assignees.

Deployment Considerations

- Test these changes in your non-production environment first. Ensure the new process is delivering the same results as previously.
- Review any existing documentation around permission sets.
- Ensure the Workday Security Administrators are aware of this process and security objects that will exist in the tenant.

What Do I Need to Do?

Note: To request this feature, contact your Named Support Contact to submit a Workday Customer Care request.

Verify these prerequisites:

- User sync is enabled.
- Workday security domains:
 - *Unified Security Administration*(Modify)
 - *Set Up: Adaptive Planning Group Sync*(Modify)
- Adaptive Planning permissions:
 - *Admin Access > Users*
 - *Admin Access > Permission Sets*

Complete these steps in Workday:

1. Run the **Migrate Adaptive Planning Permission Sets and Assignment**task.
2. Run the **User Permission Comparison Report**to verify that permission set assignments match between Adaptive Planning and Workday.
3. (Optional) Adjust any discrepancies in user permissions either in Workday or Adaptive Planning.
4. (Optional) If you're using ISU user:
 - a. Create an ISU user group and add the ISU user to this group.
 - b. Add the ISU user group to the **Maintain UAM User Integration**task.
5. Run the **Activate UAM Integration with Adaptive Planning**task.
6. Run the **Subscribe User Groups to Adaptive Planning** task and add security groups that you want to sync to Adaptive Planning.
7. (Optional) If you want to sync UAM data to Adaptive Planning in real time, run the **Notify Authorization Policy Changes to Adaptive Planning**task.

After you complete these configuration steps, user permissions will be managed from Workday and security groups will be synced to Adaptive Planning. You can then use synced Workday security groups in Adaptive Planning.

After implementing UAM, you can disable these APIs:

- permissionSets
- groups

What Happens If I Do Nothing?

You'll see no changes in Adaptive Planning. You'll continue to manage permission sets, assignments, and user groups in Adaptive Planning.

2024R2 Release Notes

2024R2 Service Pack Release Notes

Release: 2025-01-17

[Reporting Model Size Limit](#)

Release: 2024-12-13

[Machine Learning Predictive Forecaster](#) :

- We update the Description and Changes fields to document the delivery of the new Rolling Forecast check box option.
- We update the production release date for Linked Account Support to a later date.

[Headcount Planning Application](#) :

- We update the Changes field to document that we now restrict some actions when you don't select your Supervisory Organization and Time.
- With this release, we provide additional dimension types to enable an expanded range of use cases.

Release: 2024-11-08

[Unified Access Management \(UAM\)](#) : We update the Changes field to document the ability to include synced Workday security groups in processes. We update the Changes field to document the ability to include synced Workday security groups in Adaptive Planning notifications.

Release: 2024-11-01

- [Custom Concatenated Members](#) : We deliver a new feature.
- [Financial Planning and Workforce Planning Configuration Managers](#) : Coming Soon.
- [Version-Specific Overrides for Linked Accounts](#) : We update the production release date to December 13, 2024.
- [Machine Learning Predictive Forecaster](#) : We made corrections and updated the production release date
 - We corrected field labels.
 - We update the production release date for Linked Account Support to December 13, 2024.
- [Send Scheduled Reports as Attachments](#) : We now enable Scheduling Report Attachments for Workday Adaptive Planning customers using Workday Notifications. To receive emails with attachments, you must first configure Notifications. See [Steps: Set Up Workday Notifications](#).

Release: 2024-10-11

- [Version-Specific Overrides for Linked Accounts](#) : We deliver a new feature.
- [Machine Learning Predictive Forecaster](#) : We update the **Changes** section with new capabilities that are available for Preview. These changes include:
 - Support for linked accounts.
 - Scheduling forecasts.

We update the Changes field to document the new **Show Predictive Metrics** toolbar icon on cube sheets and *Show Predictive Metrics* Sheet Menu option on cube sheets on dashboards.

- [Headcount Planning Application](#) : We update the Changes field to document renaming the **To Be Hired ID** report field on the Position Request Event to **To Be Hired ID on Position Request Event**. We update the note to document support for more dimensions on workforce planning configuration managers.

- [Financial Planning Configuration Manager](#) : We update the Changes field to document the ability to clear external mappings.
- [Changes to User Interface](#) : We update the Changes field to document the renaming of the import option Replace only rows with matching secured dimensions to Replace only rows with matching level and secured dimensions.
- [Perspective Favorites in Dashboards](#) : We deliver a new feature available for Preview.
- [Waterfall Chart Improvements](#) : We deliver a new feature available for Preview.

Release: 2024-10-05

- [Cloud Data Connect for Microsoft Fabric](#): We deliver a new feature.
- [Changes to User Interface](#) : We update the **Changes** section to include the new **Manage Integration** menu we omitted from the 2024-08-17 service update.
- [Archived Versions for Data Freeze](#) : We correct the release note to add new information in the What's Coming Next section.

Release: 2024-09-27

[Headcount Planning Application](#) : We update the note to document changes to the **Secure Data** column on workforce planning configuration managers and how they now secure compensation-related data on headcount and headcount forecast plans. We update the Changes field to document the new **To Be Hired** and **To Be Hired Sheet Row** report fields on the Position Request Event business object. We update the note to document that roster sheet column label overrides configured in workforce planning configuration managers are now reflected in the roster modeled sheet columns in Adaptive Planning.

Release: 2024-09-06

[Headcount Planning Application](#) : We update the note to document an update to the related actions menu for headcount planning applications. We update the note to document support for sorting and pagination on the **Execute Headcount Plan** task.

Adaptive Planning Documentation

With the 2024R2 release, we now combine the Adaptive Planning help center product areas into a single Adaptive Planning book.

Changes

With the new Adaptive Planning book, you can now navigate to all areas of the Adaptive Planning documentation from the table of contents. The Adaptive Planning Release Notes is still a separate book. We also streamline the links on the Adaptive Planning Help Center landing page:

- Release Notes
- Get Started
- Adaptive Planning
- Product Support
- Product Downloads

Note: URL redirects will go live on September 25, 2024 to prevent bookmarks and shared links to Adaptive Planning topics from breaking.

Business Benefits

Combining the Adaptive Planning Help Center books helps you access content for all product areas in a single place.

Changes to User Interface

With 2024R2 release, we continue to align the Workday Adaptive Planning interface with Workday to provide a more consistent user experience.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. We plan to deliver this to all customers on September 21, 2024.

Changes

To provide a more consistent user experience, you can now update the following pages with a responsive design by selecting the Sheets, Reports, Dashboards check box on the Visual Preferences page in Administration:

- Reports Overview
- Scenario Manager Overview

We simplify the Integration menu, combining its submenus into the new Integration Management menu. Selecting it navigates to the Integration Management page, displaying links to all of the other integration pages.

We rename the import option Replace only rows with matching secured dimensions to Replace only rows with matching level and secured dimensions to make it clearer what gets replaced.

Change Log

We update the Changes field to document renaming of the import option Replace only rows with matching secured dimensions to Replace only rows with matching level and secured dimensions.

Version-Specific Overrides for Linked Accounts

Preview Date: 2024-10-11. Production Date: 2025-12-12.

We now provide options in the account settings to enable linked accounts for data entry in specific plan versions.

Business Benefits

The ability to override links for specific versions provides flexibility in the model. With these options you can leverage the links for certain versions when it suits your business needs. In other versions you can enable the data entry override so that you can:

- Import data into the account.
- Populate data into the account with Predictive Forecaster.
- Enter data into the account on sheets.

Changes

We provide these new options in the Link Filters section of the account settings:

- Override links for specific version: We enable you to select this check box to display the override fields for the account.
- Link Version Selector: We enable you to select a plan version for the override.
- Override Link Setting: We provide these options: *None* to keep the link, and *Data Entry* to enable imports and data input on sheets.

We provide the new options in the account settings of the target accounts that support links:

- Cube Standard.
- Cube-Entered.
- General Ledger.

- Custom.

After you set up the override, you can enter data for:

- In sheets.
- With manual imports.

For Preview tenants, you can load and export data through:

- Loaders in Design Integrations for only general ledger and custom accounts.
- `customrReportValues` and `exportData` APIs.

At this time, we show plan data during actuals overlay periods when a linked account has both of these settings:

- Enable Actuals for Link for the Actuals Overlay setting.
- *Data Entry* for the Override Link Setting.

You can now import data into data entry linked accounts in the current version for cube and standard accounts.

What Do I Need to Do?

To enable the feature for a linked account:

1. Go to Modeling.
2. Click:
 - Custom Account.
 - General ledger.
 - Edit a cube sheet and click Cube Accounts from the Sheet Summary page.
3. Select the linked account from the account list.
4. Click the check box for Override links for specific version.
5. Complete the other fields that display.
6. Save.
7. Load or enter data.

What Happens if I Do Nothing

The options remain available to use when you need it.

Change Log

Version-Specific Overrides for Linked Accounts

We now redeliver this feature to your Preview and Production tenants.

Preview Date: 2025-11-21. Production Date: 2025-11-21.

Version-Specific Overrides for Linked Accounts

We revert this functionality from Preview and Production tenants.

We plan to redeliver this functionality in a future service update.

Data Imports Into Data Entry Linked Accounts

We update the note to document the ability to import data into data entry linked accounts in the current version for cube and standard accounts.

Preview Date: 2025-09-20. Production Date: 2025-09-20.

Delay in Production Release Date

We postpone the intended delivery of this feature to Production. The new intended Production date is 2025-09-20.

Update published 2025-06-11.

Delay in Production Release Date

We postpone the intended delivery of this feature to Production. The new intended Production date is 2025-06-13.

Update published 2025-05-07.

Delay in Production Release Date

We postpone the intended delivery of this feature to Production. The new intended Production date is 2025-05-09.

Update published 2025-01-27.

Enable Data Entry and Linked Account by Version with Loaders and APIs

We update the Changes and Coming Soon fields to indicate you can now import and export data from linked cube accounts set to data entry through loaders in Design Integrations and APIs.

Update published 2025-02-08

Actuals Overlay Behavior with Linked Account Overrides

We update the Changes field to include the behavior of actuals overlay for accounts with linked overrides.

Update published 2025-01-24.

Update to Production Release Date

We now plan to deliver this feature to Production at a later date.

Update published 2024-11-15.

Update to Production Release Date

We now plan to deliver this feature to Production with the 2024-12-13 service update.

Update published 2024-11-1.

Related Information

[2025R2 Feature Release Note: Version-Specific Overrides for Linked Accounts](#)

Archived Versions for Data Freeze

With the 2024R2 Release, we introduce a new Archive version check box for plan versions. This check box enables you to archive plan versions, which results in a more complete data freeze. When you enable the check box, we calculate and store the values of all calculated and linked accounts. This freezes the values and stops them from recalculating as you make future changes to the model.

The Archive version check boxes displays for all plan versions and replaces all Calculate Formula Values check boxes that are inactive.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. We plan to deliver this to all customers on September 21, 2024.

Watch the video: 7m 10s

Business Benefits

With this feature we enable you to make changes to actuals version data, linked account configurations and your model structures, such as Levels and Custom Dimensions, without losing the integrity of the leaf-level data in historical versions.

Changes

We replace the Calculate Formula Values check box with the new Archive version check box in the Version area of Modeling. The new check box provides more functionality to help you maintain data integrity in locked versions. With this feature, we enable you to:

- Make changes to the modeling hierarchies, like accounts and levels, with APIs, integration loaders, imports, and through the application without affecting the leaf data in archived versions. Rollup values within archived versions continue to aggregate dynamically based on structural changes.
- Restate actuals data without affecting the actuals overlay or plan data within archived versions.
- Reconfigure linked accounts without affecting the data in archived versions. Example: You can assign different attributes or add filters to the link with no impact on the data of the archived version.

What's Coming Next

In future releases, we plan to:

- Improve the behavior of allocation and elimination rules for archived versions. See [FAQ: Archived and Locked Versions](#).
- Retire the Calculate Formula Value option, which we plan to do at 2026R1.

Examples

The *2024 6+6 Forecast* version has actuals overlay for Jan-Jun. For July, you enter a formula in a standard sheet that references January 2024, a period with actuals overlay.

Upon finalizing this plan version, previously, you would go to the Version area of Modeling and select Calculate Formula Values for the *2024 6+6 Forecast* version. However, with this option, when you restate your actuals data, January 2024 reflects the new actuals data, and the values in the Time, Dimension, and Level rollups are impacted by dynamically aggregating this new data. In addition, the calculation for June 2024 in the standard sheet has the potential to update because it's referencing a different value.

Now, with Archive Version, you can restate the actuals without impacting the actuals overlay data in archived versions, which prevents any changes to the reported Time, Dimension, or Level rollup data, while also saving the calculated value that resulted from the original output of the formula in the archived version.

What Do I Need to Do?

Plan versions that have the Calculate Formula Values check box enabled retain the Calculate Formula Values check box.

To use the new Archive version check box on these versions, you must first clear the Calculate Formula Values check box. Clearing the Calculate Formula Values check box causes the version to recalculate. Ensure you are comfortable with the potential data changes that may result before clearing the check box.

Change Log

New What's Coming Next Content:

We correct the release note to add new information in the What's Coming Next section.

Related Information

- [Lock, Archive, or Hide Versions with Access Controls](#).
- [Concept: Locked, Archived, or Hidden Versions](#).
- [FAQ: Deprecation of Calculate Formula Values](#).
- [FAQ: Archived and Locked Versions](#).

Machine Learning Predictive Forecaster

With the 2024R2 Release, we introduce Predictive Forecaster, powered by machine learning (ML). Predictive Forecaster leverages your historical data to populate specified forecast versions with ML predicted data.

We enable you to run time series forecasts with regressor data in addition to your historical data within the Workday Adaptive Planning platform. We provide the choice to select the most suitable ML algorithms based on patterns in your data. We also enable you to define the targeted forecast version, time ranges, accounts, and custom dimensions by sheet.

We also provide Confidence Metrics, which enables you to view a dashboard with charts. The charts offer insights into the accuracy and probability range of your forecasts.

We also provide the ability to schedule rolling forecasts, which reference the newest actuals data as you load them. We can then populate new forecasted data into more periods when the forecast runs according to the schedule.

Note: Some of this functionality is only available in Preview at this time.

What the video: 6m 52s

Business Benefits

Improve both efficiency and accuracy with Predictive Forecaster. Predictive Forecaster seeds plan versions with ML-generated data, which serves as a reliable starting point for budget managers. Predictive Forecaster uses a science- and math-based approach to forecasting, which can replace or enhance the time-consuming manual process.

Changes

We provide a new *Predictive Forecaster* permission in the Permission Sets of the Administration area. To access Predictive Forecaster, you must add the new permission to your permission sets.

From the new Predictive Forecaster page in Modeling, we enable you to create and run forecasts. You can run the forecast or save it and run it later. You can also rerun the same forecast.

In the Create Forecast form, we provide these sections to help you define the forecast:

- **Forecast:** Specify where to populate the forecasted data. You can select a specific sheet, any unlocked plan version, and the start and end periods.
- **Filters:** Focus your forecast on specific accounts, levels, and custom dimensions.
- **Reference Data:** Define the range of historical data that you want the algorithm to study. You can set the start and end periods of an actuals version. We also enable you to add plan versions as additional reference data.
- **Algorithm:** Select from 8 algorithms. We also enable you to define seasonality and leverage regressor data with lever sheets.

We enable to choose from these algorithms:

- Prophet
- N-Beats
- Holt-Winters
- Kalman Filter
- Orbit-DLT
- LightGBM
- Croston
- AutoFit

AutoFit is a machine learning algorithm developed by Workday that automatically picks from the available algorithms based on your specific historical data and trends.

After you save or run forecasts, we enable you to review and sort the list of forecasts. From the list, you can:

- Access the *More Actions* menu.
- Check the most recent status of each.
- Link to the sheet that contains the forecasted data.

We display these statuses:

- Blank: You have saved the forecast definition, but you haven't initiated the 1st run.
- In Queue: You ran the forecast, but it hasn't started yet.
- In Progress: The forecast is running. We display the percent of completeness.
- Failed: The forecast failed. You can review the errors in the Status section of the Forecast History page and troubleshoot.
- Success: The forecasted data has populated the plan version.

From the toolbar, we enable you to:

- Delete selected forecasts.
- Start typing in the Search field to locate the forecast by name or sheet.

We also enable you to hover over a forecast name and click the 3 dots that display to open the *More Actions* menu. From the *More Actions* menu, we provide these options:

- *View Details*: Review the specifications of the forecast.
- *View History*: Open the Forecast History page where we display the status of each run. We also display any error messages of failed runs to help you troubleshoot.
- *Run*: Begin the process of populating the forecast version with machine learning data.
- *Edit*: Change the definition of the forecast.
- *Duplicate*: Start a new forecast with the definition of an existing forecast.
- *Delete*: Delete the forecast definition — and still retain the populated forecasted data in sheets.
- *Cancelled*: A forecast that was in progress was cancelled.

From Forecast History page, we enable you to select a historical run and view the parameters and the status details. In the Parameters section, we provide these definition details:

- Filters
- Reference Data
- Algorithm

In the Status section we provide these details:

- How long a successful forecast took to run.
- A progress bar for pending forecasts that are In Progress.
- A list of errors for failed forecasts to help you troubleshoot and try again.

For eligible customers, we also provide options that enable you to generate confidence metrics. The Confidence Metrics tab in the Forecast History page enables you to view a dashboard with metrics to give you insights into the accuracy and probability range of the forecast. When you create forecasts, we provide these options:

- Forecast Range: Populate forecasted data at the upper and lower limit into 2 additional versions. This option also generates a chart in the Confidence Metrics that maps the prediction against the upper and lower limits of the prediction.
- Probability Level: Specify how broad or narrow you want the range to be.
- Accuracy Metric: Generate a back-test against existing actuals to get an accuracy metric in the Confidence Metrics tab.

On the Confidence Metric tab, we enable you to review the resulting charts and filter your perspective.

SHOW PREDICTIVE METRICS ON CUBE SHEETS

When you select a version with data generated by a predictive forecaster on cube sheets, we add a new **Show Predictive Metrics** toolbar icon that enables you to display on cells with generated data:

- A purple triangle on the corner of the cell.
- Hover text with the forecast range and accuracy metrics.

If cells with generated data exist on a row, we display the purple triangle and hover text on all cells in the row. When you don't enable accuracy metrics on the predictive forecaster or no metrics exist, we disable the toolbar icon.

For these sheets on dashboards, we add a new *Show Predictive Metrics* option on the Sheet Menu that enables you to display the purple triangle and hover text.

SCHEDULING FORECASTS

Note: This functionality is only available for Preview at this time. We plan to deliver this to Production on March 15, 2025.

We now enable you to schedule forecasts. We provide these frequency options:

- *Monthly*, where you can select the day of the month.
- *Weekly*, where you can select the weekdays.
- *Daily*.
- **Time**, where you can specify the time and time zone of the scheduled runs.

We also enable you to:

- Add more than 1 forecast to the schedule.
- Rearrange the order of the forecasts in the schedule using the drag and drop function.

When you have more than 1 forecast in a schedule, we provide a check box, **Continue running all forecasts even if one fails**. Selecting this check box enables us to skip failed forecasts so that we can run the next forecast on the schedule.

To support the creation of schedules, we update the **Predictive Forecast** page with these elements:

- New **Schedules** tab in the left menu, which enables you to view a list of your current schedules and take further actions.
- New options when you click the **Add New** button, which enables you to select *Forecast* or *Schedule*.
- New option when you hover over forecasts and click the 3 dots, which enables you to select *Schedule* to create a schedule for the forecast.

In the new **Schedule** tab we provide a list of schedules where we display the status, the next scheduled run, the frequency, and the creator of the schedule.

We enable you to hover over a schedule to click the 3 dots, which opens the **More Actions** menu for schedules. In this menu, we provide these options:

- *Run*: Runs the scheduled forecasts ahead of time.
- *Edit*: Opens the Edit Schedule dialog.
- *Pause*: Stops the next runs until you resume them.
- *Delete*: Removes the schedule.
- *Resume*: Reactivates a paused schedule.

LINKED ACCOUNT SUPPORT

Note: This functionality is only available for Preview at this time. We plan to deliver this to Production at a later date.

We now support running forecasts on linked accounts. We provide a new **Override link for specific version check box** in the **Link Filters** section of the account settings. We enable you create a data entry override, which makes the account available for Predictive Forecaster for the versions you specify.

ROLLING FORECASTS

Note: This functionality is only available for Preview at this time. We plan to deliver this to Production on March 15, 2025.

We add rolling forecasts as a new capability to Predictive Forecaster. With rolling forecasts, we enable you to sync the reference periods and forecast periods to the Completed Value Through period of your actuals. We enable you to combine this functionality with the scheduling feature to run Predictive Forecaster on a rolling basis as your actuals data gets updated. Referencing your most up-to-date actuals increases the relevancy of the forecasted data.

With rolling forecast enabled, we shift important forecast periods automatically to align with loaded actuals data. This automatically updates the forecast definition so that you can run it again without editing the definition. When you coordinate the scheduling capability with the rolling forecast capability, the forecast automatically runs at intervals, while referencing new actuals data and generating new forecasted data.

We shift these dates forward in the forecast definition:

- **Actuals End Period:** To ensure that the next run references the newest data that you loaded, we automatically align this period to the Completed Value Through period of the Actuals Version. When there's no Completed Value Through period, we align to 1 period before the Start of Plan of the Forecast Version.
- **Forecast Start Period:** To ensure that we populate new data based on the loaded actuals, we automatically set the Forecast Start Period with whichever comes later: 1 period after the Completed Value Through of the Actuals Version or the Start of Plan of the Forecast Version.
- **Forecast End Period (optional):** We provide you the option to also shift this period to ensure that we populate new data into new periods as you load actuals. The Forecast End Period shifts the same amount of periods forward as the Forecast Start Period.

We provide 2 new options when you click the new Rolling Forecast check box in the forecast definition:

- Shift forecast start period and end period.
- Shift only forecast start period.

We provide warnings on the Schedules page to indicate when a scheduled forecast will fail due to conflicting start and end periods.

What Do I Need to Do?

To give users access to the Predictive Forecaster, add the *Predictive Forecaster* permission to the permission sets.

Change Log

Update

- We update the Description and Changes fields to document the delivery of the new Rolling Forecast check box option.
- We update the production release date for Linked Account Support to a later date.

Preview Release: 2024-12-13

Update

We now plan to deliver the Linked Account Support portion of this feature to Production at a later date.

Update published 2024-11-29.

Corrections

We incorrectly reported that you can select *Schedule* from the More Actions menu when you hover over forecasts in the list. This option is not available from the More Actions menu and we have removed this content from the release note.

We also:

- Correct the name of a field, from Probability Range to Forecast Range.
- Add the *Cancel* option to More Actions menu, which enables you to stop a forecast from completing.
- Add the Cancelled status for forecasts that you stopped from completing.

Corrections published: 2024-11-1

Scheduling and Linked Accounts

We update the Changes section with new capabilities that are available for Preview. These changes include:

- Support for linked accounts.
- Scheduling forecasts.

Preview Release: 2024-10-11.

Show Predictive Metrics on Cube Sheets

We update the Changes field to document the new **Show Predictive Metrics** toolbar icon on cube sheets and *Show Predictive Metrics* Sheet Menu option on cube sheets on dashboards.

Preview Release: 2024-10-11. Production Release: 2024-11-8.

Related Information

- [Setup Considerations: Predictive Forecaster.](#)
- [Create Machine Learning Forecasts.](#)
- [Concept: Predictive Forecaster.](#)
- [FAQ: Predictive Forecaster.](#)

Long-Running Processes in the Planning Center

With the 2024R2 Release, we provide a new report, Long-Running Processes, in the Planning Center. This feature enables you to review and cancel processes that have been running for more than 30 seconds.

Note: Planning Center is not available to customers in Singapore at this time.

Watch the video: 1m 54s

Business Benefits

Long-Running Processes helps you identify and stop processes that are causing bottlenecks in your model. When larger processes run at peak-traffic times, they can decrease performance and block normal planning activities. You can now identify these large processes, cancel them when necessary, and re-run them during low-traffic times.

Changes

In the **Planning Center**, we provide a new section, called **Process Dashboard**. The **Process Dashboard** includes **Long-Running Processes**. When you click **Long-Running Processes**, we provide a list of processes that have been running for over 30 seconds.

You can use the **Cancel** button in the **Action** column to stop a process. When we don't enable you to stop a process, we display **uncancellable** in the **Action** column.

Long-Running Processes include these processes types:

- Sheet loads.
- APIs.
- Admin updates.
- Excel exports.
- Imports.

Admin updates include these processes:

- Locking and archiving archives.
- Copying or importing large sheets.
- Deleting sheets with high dimensionality.
- Deleting or changing custom dimensions or levels.
- Changing sheet definitions.

We only display:

- Processes that have been running for over 30 seconds.
- The username of the person running the process.

We don't display:

- Processes after you canceled them.
- The related sheet, report, version, or model component.

Example

You can stop large imports during high-traffic times, so that regular processes can proceed. As an option, you can reach out to the listed user who started running the process to let them know that you canceled it and encourage the user to try again at a low-traffic time.

What Do I Need to Do

To use Long-Running Processes, you need the *Planning Center* permission.

Related Information

[Monitor and Cancel Long Running Processes.](#)

Codes for Calendars and Modeled Sheet Display Columns

With the 2024R2 Release, we add editable codes for your calendars. We also make codes editable for display columns in modeled sheets.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. We plan to deliver this to all customers on September 21, 2024.

Business Benefits

This feature brings consistency to your model. Codes enable you to identify your calendars and display columns uniquely.

Changes

For calendars, we now provide:

- New Calendar Code fields when you rename your calendars.
- New Calendar Code column in the import and export excel sheet for calendars. In the first tab of the import template, we updated the instructions.
- Unique codes for existing calendars that we automatically create. The codes match the current calendar names. You can change these codes in the Time area of Modeling.

For display columns in modeled sheets, we:

- Enable you to edit the Code fields.
- Automatically update codes for existing display columns to make them unique by appending an underscore and the column number. You can change these codes in the sheets area of Modeling.

For the Modeled Sheet Definition API, we:

- Change the purpose of the Code field. The Code field now corresponds to the code for the display column.
- Add a new field, called `accountCode`, which is now the code for the account that's associated with the display column.

Translated Currencies for Actuals Versions

With the 2024R2 release, we introduce translated currencies. With translated currencies we enable you to load actuals data in a specific currency for all levels. You can load your data in the local currency of each leaf level as usual. In addition, you can load the same set of data in a single currency for all levels.

Business Benefits

When your source systems store granular, transaction-specific exchange rates, you can get variances between the actuals in your source and the actuals in Adaptive Planning because of how we convert the data between currencies. Loading translated actuals eliminates the conversion of the actuals data.

With translated currency, you load your actuals already translated from your source. As a result, the actuals in Adaptive Planning exactly matches the actuals in the source for the currency.

In addition, reports pull from the actuals loaded in the currency, removing the need to calculate conversion with exchange rates.

Changes

In the Version area of Modeling, we provide a new Enable Translated Currency check box in the settings within sub-versions of actuals. When you enable this check box, the Selected Currencies drop-down prompt enables you to select 1 currency as a translated currency.

In Design Integrations, we update your ability to import actuals data into the version that you enabled for translated currencies. You have the option to select:

- The nested currency within the sub-version to load the full data set in a single currency for all levels.
- The sub-version itself to load data as usual in the local currency of each level.

We also update these APIs:

- v40 of the `exportVersions`: We add the `currencyVersions` attribute in the Include element to indicate if the nested currency of the sub-version is included in the response.
- v40 of the `importStandardData`: The API supports imports to the sub-version for the currency.

We also enable you to set up translated currency from the financial planning configuration manager task in Workday. We provide these new fields:

- Translated Currency on the Currency page enabling you to select up to 1 translated currency.
- Account Translation Rule Set on the Actuals page enabling you to select the rule set for mapping translation rate types to ledger accounts.

When you enable translated currencies on versions, we continue to display values using local currencies for each level on sheet data and Explore Cell on sheets.

When you enable translated currencies on versions and explore cells in these areas, we now display values using the reporting currency of those cells:

- Dashboards.
- OfficeConnect.
- Web Reports.

Example

Your instance uses both USD and EUR. For the sub-version, Ledger Import, you enable translated currencies and select USD as the translated currency. Now, you can load your entire actuals data set in USD from your source system.

In Integration, when you select Ledger Import version for importing your actuals data, you have the option to select the USD currency, which displays nested under the Ledger Import version.

Later, you build a report in USD and pull the appropriate data in the currency of the report, without the conversion of data with exchange rates.

What Do I Need to Do?

To see if your instance is eligible for this feature, a Named Support Contact must contact us. See [Reference: Contact Us](#).

Related Information

- [2025R2 Feature Release Note: Translated Currencies for Actuals Versions](#)
- [Concept: Currencies and Exchange Rates](#).
- [Concept: Translated Currencies](#).
- [Reference: Settings for Actuals Versions](#).

Create Associations with Attributes

With the 2024R2 Release we enable you to create user associations using level and custom dimension attributes.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. We plan to deliver this to all customers on September 21, 2024.

Business Benefits

This feature helps simplify the setup and maintenance of your access rules.

Changes

Now, you can add level and custom dimension attributes to associations in addition to levels and custom dimensions.

Example

You create an association that connects the Budget Planner user group with Region level attribute values, *Northwest*, *Southwest*, *Northeast*, *Southeast*. This association connects the group with all levels tagged with any of the attribute values.

When you write a single access rule for the Budget Planner group, you can reference the association rather than the individual attribute values. When Budget Planner group requires access to a new level attribute value, you only need update the association instead of updating the rules.

Related Information

- [Import Associations](#).
- [Add Rules to the Access Rule Spreadsheet](#).
- [Load Associations with Attributes](#).

Support Attributes in Association Loaders

We enable support for attributes in Adaptive Planning association loaders.

Changes

You can map attribute names in the column mapping tab of association loaders.

Business Benefits

This makes it easier to include attributes when you load associations.

What Do I Need to Do?

Map attributes in the column mapping tab in the association loader.

Related Information

- [Create Planning Association Loaders](#)
- [../../../../integration/managing-data-integration/design-integrations/loaders/load-associations-with-attributes.dita](#)

Model Reports Scheduling

With this release, we enhance report scheduling functionality to include model reports.

Business Benefits

This feature eliminates the need to manually select and share recurring model reports with select users.

Changes

You can create schedules for model reports from Shared or Favorites folders. We also improve error messaging for scheduling.

What Do I Need to Do?

To schedule model reports as live reports or snapshots, you need these permissions:

- *Create Report Schedules.*
- (Optional) *Manage all Report Schedules.*

To schedule model reports as attachments, you need these additional permissions, including the ones listed above:

- *Send Attachments in Notifications.*
- *Download to Excel.* Both schedulers and recipients need this permission.

What Happens If I Do Nothing?

You'll see the **Create Schedule** option in the **Actions** menu for model reports. You can ignore the option.

Rename Matrix Report Property

With this release, we rename the **Optimize report for faster load time** matrix report property label and header.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. We plan to deliver this to all customers on September 21, 2024.

Changes

- Renamed **Optimize report for faster load time** label to **Optimize report execution**.
- Renamed **Advanced** header to **Optimization**.

Send Scheduled Reports as Attachments

With this release, Workday enables end users to schedule matrix and model reports as Excel attachments in email notifications. Recipients can then download the attachments from their email notifications.

Watch the video: 3m 45s

Business Benefits

Report recipients can review report results in the convenience of their email notification without having to navigate to the application.

Changes

We add:

- A new option in **Administration > General Setup** to enable attachments with scheduled notifications.
- A new *Send Attachments in Notifications* permission.

After enabling the new option and with the required permission, you can see the new **Send Report as Attachment** option when creating a schedule.

What Do I Need to Do?

You need to enable the feature from Administration, General Setup. After enabling the feature, you can schedule matrix and model report notifications with attachments. Optionally, you can enforce password protection on the schedule.

You need these permissions for scheduling reports:

- *Create Report Schedules* .
- *Send Attachments in Notifications*.
- (Optional)*Manage all Report Schedules* .
- *Download to Excel*. Both schedulers and recipients need this permission.

Also, you need to verify that email IDs exist for the notification recipients.

What Happens If I Do Nothing?

You'll see no changes in Adaptive Planning if you don't enable this feature. The ability to schedule reports as attachments won't be available in your tenant.

Change Log

We now enable Scheduling Report Attachments for Workday Adaptive Planning customers using Workday Notifications. To receive report notification emails with attachments from Adaptive Planning, you must configure Notifications and create Notification Routing Rules. See [Steps: Set Up Workday Notifications](#).

Write Back from OfficeConnect to Adaptive Planning

With this release, Workday enables you to submit data edits from valid leaf-level intersections in OfficeConnect reports to Adaptive Planning.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. We plan to deliver this to all customers on September 21, 2024.

Watch the video: 5m 56s

Business Benefits

The ability to submit edits from OfficeConnect, enables you to:

- Update your planning data without leaving Excel.
- Use Excel capabilities such as formulas and copy and paste functions.

Changes

In writeback mode, you can only edit and submit changes for these supported elements:

- Accounts: Cube, Custom, GL, and Assumption.
- Levels: Leaf levels only.
- Versions: Plan versions and scenarios.
- Calendars: Default calendars only.
- Dimensions: For cube accounts all dimensions must be present.
- Attributes: Dimension attributes and corresponding dimensions must be present.

What Do I Need to Do?

You need to install the latest version of the OfficeConnect add-in. Also, you need the new *Writeback from External Sources* permission assigned.

What Happens If I Do Nothing?

You'll see no changes in Adaptive Planning if you don't install the latest version of OfficeConnect.

Save Perspective Filters

With the 2024R2 release, we now enable you to save perspective filter sets in dashboards.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. We plan to deliver this to all customers on September 21, 2024.

Changes

You can now create and save personal perspective filters. Users with the *Edit Dashboards* permission can create and save shared perspective filters. The Default shared filter from the filter button sets the perspective filter settings to the last published state.

Business Benefits

Saving filter sets helps save time by making it easier to switch between the filter sets you care about.

Related Information

[Save Perspective Context Filters.](#)

Perspective Favorites in Dashboards

With this release, we now enable you to favorite perspectives.

Note: This functionality is only available to Adaptive Planning Preview customers at this time. We plan to deliver this to all customers on March 15, 2025.

Changes

You can now favorite a perspective.

Business Benefits

Introducing favorites for perspectives helps you locate the perspectives you care about most.

Waterfall Chart Improvements

With the 2024R2 release, we now enable you to select specific accounts in Data Settings for opening, variance, and closing accounts.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. We plan to deliver this to all customers on November 8, 2024.

Changes

We provide a new option in the waterfall chart Appearance Settings called Multiple Variance Accounts. With Multiple Variance Accounts enabled, we remove the Reference Value and Comparison Value fields and we add the following new options in Data Settings:

- Opening Account: The account for the waterfall start value.
- Variance Accounts: The accounts used as variance values. You can have up to 20 Variance Accounts.
- Closing Account: The account for the waterfall end value.

When you add Variance Accounts, you can now select how you visualize the account with the Display field:

- Account: Visualize the account as a single data point.
- Breakdown: Visualize each child account separately.
- Subtotal: Visualize the account as an intermediate subtotal column.

With Multiple Variance Accounts enabled we also update waterfall charts by now:

- Adding Subtotal Color field in Appearance Settings.
- Removing the Labels Type and Axis Title fields.
- Changing the data point tooltips to show time, account, version, and value.
- Adding an Other column to let users know data is missing usually due to data access restrictions. The Other column doesn't support explore data and drill down options.

Note: If you enable Multiple Variance Accounts on an existing waterfall chart, settings related to reference and comparison values are preserved when you disable Multiple Variance Accounts.

Business Benefits

Enabling Multiple Variance Accounts provides more flexibility for waterfall chart analysis.

Related Information

- [Create a Waterfall Chart with Subtotals.](#)
- [Reference: Waterfall Chart Settings.](#)

Integration Planning Data Source Scalability

With this release, we uptake the streaming version of exportData API in the Integration Planning Data Source.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. We plan to deliver this to all customers on September 21, 2024.

Business Benefits

This feature provides:

- Faster performance and scalability.
- The ability to export more data.

Changes

You can now use the Integration Planning Data Source to export 2 million rows of data from Adaptive Planning. Previously, the limit was 500,000 rows.

This feature supports:

- All account types, except:
 - System account (includes allocation, minority interest %, elimination, cumulative translation adjustment).
 - Model sheet assumption account.
 - Cube account with custom time stratum
- All modeling features, except:
 - Weighted average translation.
 - Text rollups.
 - Spread lookups.
 - Value lookups

Manage JDBC Sources in Data Agents

We now enable you manage a JDBC source for an Adaptive Planning Data Agent, making it easy to associate a new data agent with an existing JDBC data source.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. We plan to deliver this to all customers on September 21, 2024.

Changes

We provide a new Associated Agent field in JDBC data sources for users to link the data source with a different Adaptive Planning Data Agent.

Business Benefits

This removes the need to contact support when you want to associate a new Adaptive Planning data agent with an existing JDBC source.

Replace Mode by Level for Model Sheet Import in Planning Data Loaders

We now enable you to replace data by level when you import into modeled sheets using planning data loaders.

Note: This functionality is only available to Adaptive Planning Limited Preview customers at this time. We plan to deliver this to all customers on September 21, 2024.

Changes

We provide a new Replace all by levels mode.

Business Benefits

This improves the user experience, making it easier to target exactly the modeled sheet data you want to replace.

What Do I Need to Do?

Update data loader for modeled sheet with the Import Option: Replace all Data in the sheet, but only for the Imported levels.

What Happens if I Do Nothing?

The planning data loader for the modeled sheet will continue to run as originally designed.

Import Splits to Unsplit Data with the importStandardData API

We update the importStandardData API to enable importing splits to unsplit locations with existing data.

Business Benefit

This reduces implementation time and avoids error-prone manual steps.

Changes

The importDataOptions element now supports the splitsToUnsplit attribute for API v40 and higher. This attribute defaults to false.

Release: 2024-09-21

Planning for HCM and Financials

Planning for HCM and Financials

These features require you to have additional SKUs related to Human Capital Management or Financials.

Headcount Planning Application

When you perform bottom-up, position-level workforce planning, we continue to enhance your workforce planning configuration managers with more security for compensation data, column label overrides reflected in Adaptive Planning, and a new data extraction security domain. We also update the user experience when you view your headcount and headcount forecast plans, and execute headcount plans.

Business Benefits

- The new Planning Staffing Status icons improves visibility on which Planning Staffing Status values the rows have.
- The new related actions menus, related actions menu options, and ability to click directly on the objects make it easier to investigate and take action on those objects.
- The sorting and pagination expedite navigation and data entry, and also improves performance.
- The new data extraction domain now enables your workforce planning configuration managers to extract more data at a time with improved performance and scalability.

Changes

On the **Dimensions** page of the **Manage Workforce Planning Configuration** task, we now enable you to add these dimensions:

- Contingent Worker Type
- Pay Rate Type
- Pay Component
- Pay Frequency
- Union

We deliver these new report fields on the Plan Dimension business object (secured to the *Set Up: Adaptive Planning* domain) that you can use for the new dimensions on your workforce planning configuration managers:

- **Plan Dimension as Contingent Worker Type**
- **Plan Dimension as Pay Rate Type**

We also deliver the **Frequency** report field on the Frequency business object (secured to the *Public Reporting Items* domain) that you can use for the new dimensions on your workforce planning configuration managers.

On the **Roster Sheet** page of the **Manage Workforce Planning Configuration Manager** task, we rename the **Secure Report Data** column to **Secure Data** and update the hover text. This check box now enables you to secure compensation data on reports, headcount plans, and headcount forecast plans.

When you select the **Secure Data** check box for sheet columns, we now only display the data to users with access on the *Compensation Details: Headcount Planning* domain.

We secure access to compensation-related columns when you view the headcount or headcount forecast plans using these My Tasks items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

When you use column label overrides for sheet columns, we now use those label overrides in the roster modeled sheet columns in Adaptive Planning.

When you edit an active workforce planning configuration manager on the **Manage Workforce Planning Configuration** task, we add a new **View Details** link on these pages so that you can access those model objects in Adaptive Planning:

- Roster Sheet.
- Version.

We also add a new **Details** table column with a **View** link on these pages:

- **Dimensions.**
- **Level.**
- **Preview Data.**

We also deliver a new *Manage: Workday Data Extraction* security domain that you can use to extract up to 5 million lines of data at a time for the workforce planning configuration manager.

When you view headcount and headcount forecast plans, we now remove the select all check box in the table header. Instead, we recommend that you:

1. Click the check box for your first row.
2. Scroll down to your last row.
3. Hold Shift on your keyboard.
4. Click the check box for your last row.

In this table, we also now:

- Display icons next to the Planning Staffing Status value for each row.
- Display related actions menus next to objects.
- Enable sorting and pagination.
- Enable you to click directly on objects to access them.

When you don't select your Supervisory Organization and Time during headcount planning, we now restrict you from these actions: Creating a position. Editing a position. Opening the actions menu for a position.

We restrict these actions when you view the headcount or headcount forecast plans using these My Tasks items: Headcount Planning Event Headcount Planning Participant Detail Event

- Creating a position.
- Editing a position.
- Opening the actions menu for a position.

We add these options on the related actions menu of headcount planning applications:

- View
- Copy
- Rename
- Delete
- Manage

We deliver these new report fields on the Position Request Event business object (secured to the *Public Reporting Items* domain) that you can use in condition rules for business processes:

- **To Be Hired ID on Position Request Event**
- **To Be Hired Sheet Row**

We also update the grid on the **Execute Headcount Plan** task to now support sorting and pagination.

Note: We don't secure access to columns using the *Compensation Details: Headcount Planning* domain for existing headcount and headcount forecast plans. We don't enable sorting and pagination on existing headcount and headcount forecast plans.

What Do I Need to Do?

Give the integration system user (ISU) for the workforce planning configuration manager access to the *Manage: Workday Data Extraction* security domain.

Update the registered API client for the workforce planning configuration manager in Workday and:

- Add **Scope (Functional Areas): System**.
- Select **Include Workday Owned Scope**.

If you want users to have access to data that's secured by the **Secure Data** column, add those users to security groups with access to the *Compensation Details: Headcount Planning* domain.

When you add the new dimensions to your workforce planning configuration managers on the **Manage Workforce Planning Configuration** task, select a **Field** for those dimensions on the **Roster Sheet** page.

What Happens If I Do Nothing?

If you don't use the new *Manage: Workday Data Extraction* security domain, your workforce planning configuration managers continue to operate with a 1 million line data limit instead of the new 5 million line data limit.

Change Log

Headcount Planning Application

We update this release note to change the feature title from "Bottom-Up Workforce Planning" to "Headcount Planning Application."

Preview Date: 2024-08-17. Production Date: 2024-09-21.

Enforce Supervisory Organization and Time Selections

We update the Changes field to document that we now restrict some actions when you don't select your Supervisory Organization and Time.

Preview Release: 2024-12-13. Production Release: 2025-01-10.

Additional Dimension Types for Workforce Planning Configuration Managers

With this release, we provide additional dimension types to enable an expanded range of use cases.

Preview Release: 2024-11-22. Production Release: 2024-12-13.

Manage: Workday Data Extraction

We update the note to document the new *Manage: Workday Data Extraction* security domain, and registered API client changes required for the workforce planning configuration manager.

Preview Release: 2024-08-17. Production Release: 2024-09-21.

Sorting and Pagination on Headcount and Headcount Forecast Plans

We update the note to document the ability to sort the grid and the new pagination functionality when you view headcount and headcount forecast plans.

Preview Release: 2024-08-17. Production Release: 2024-09-21.

View Details on Active Workforce Planning Configuration Managers

We update the note to document the ability to view more details about your active workforce planning configuration managers when you edit them.

Preview Release 2024-04-05. Production Release: 2024-09-21.

Related Actions Menu for Headcount Planning Applications

We update the note to document an update to the related actions menu for headcount planning applications.

Preview Release: 2024-09-06. Production Release: 2024-09-21.

Sorting and Pagination on Execute Headcount Plan Task

We update the note to document that the grid on the **Execute Headcount Plan** task now supports sorting and pagination.

Preview Release: 2024-09-06. Production Release: 2024-10-11.

Secure Plan Data Using Compensation Details: Headcount Planning Domain

We update the note to document changes to the **Secure Data** column on workforce planning configuration managers and how they now secure compensation-related data on headcount and headcount forecast plans.

Preview Release: 2024-09-27. Production Release: 2024-10-11.

To Be Hired Report Fields

We update the Changes field to document the new **To Be Hired** and **To Be Hired Sheet Row** report fields on the Position Request Event business object.

Preview Release: 2024-09-27. Production Release: 2024-10-11.

Roster Sheet Column Label Overrides for Workforce Planning Configuration Managers

We update the note to document that roster sheet column label overrides configured in workforce planning configuration managers are now reflected in the roster modeled sheet columns in Adaptive Planning.

Preview Release: 2024-09-27. Production Release: 2024-10-11.

Rename To Be Hired ID Report Field

We update the Changes field to document renaming the **To Be Hired ID** report field on the Position Request Event to **To Be Hired ID on Position Request Event**.

Preview Release: 2024-10-11. Production Release: 2024-10-11.

Additional Dimensions on Workforce Planning Configuration Managers

We update the note to document support for more dimensions on workforce planning configuration managers.

Preview Release: 2024-10-11. Production Release: 2024-11-08.

Related Information

[Steps: Create Workday Credentials in Adaptive Planning](#)

[Manage Workforce Planning Configurations](#)

[Complete Headcount Planning Participant Detail Events](#)

[Execute Headcount Plans](#)

Increased Limits for the Reporting Data Model

For OfficeConnect for Financial Management, we now increase the limits for available dimensions and hierarchies in the reporting model.

Business Benefits

You can configure additional dimensions and hierarchies in the reporting model. When end users drill on the data in OfficeConnect reports, they can view additional details.

If you reached the previous limits of:

- 10 alternate hierarchies, then you can now add up to 10 more alternate hierarchies.
- 15 optional dimensions, then you can now add up to 10 more optional dimensions.
- 20 Show Details fields, then you can now add up to 10 more fields per version type.

Changes

We increase:

- Optional dimensions from 15 to 25.
- Alternate hierarchies from 10 to 20.
- Show Detail fields from 20-30.

What Do I Need to Do?

Run the **Set Up Reporting Model** task to configure the extra dimensions and hierarchies.

What Happens If I Do Nothing?

You'll see no changes in Workday if you don't run the **Set Up Reporting Model** task. The additional dimensions and hierarchies won't be available in the reporting model.

Related Information

- [OfficeConnect - Financial Management - Getting Started](#)
- [Enable OfficeConnect for Workday Financial Management](#)

Support for Noncontrolling Interest Eliminations

With this release, Workday factors in noncontrolling interest (NCI) when performing consolidated reporting for partial ownership companies. Elimination calculations now automatically include NCI eliminations.

Watch the video: 3m 7s

Business Benefits

NCI Eliminations:

- Enable accuracy in consolidated reporting for partial ownership companies.
- Avoid overstating company information based on partial ownership of specific companies.

Changes

After you opt in to NCI by ownership and begin running noncontrolling interest to generate persisted NCI entries, OfficeConnect for Financial Management includes these NCI amounts in consolidated reports:

- Automatically as part of general report refreshes.
- When using Show Details with respective company hierarchy or elimination nodes.

What Do I Need to Do?

If you have set up the NCI by Ownership feature, then OfficeConnect for Financial Management can report on NCI.

When setting consolidation details for a company hierarchy in the **Edit Consolidation Details** task, follow these guidelines to select a valid consolidating parent company and avoid errors:

- The consolidating parent company must be a descendant of the company hierarchy.
- If the consolidating parent company is part of a sub-hierarchy, it should also serve as the consolidating parent for that sub-hierarchy.

What Happens if I Do Nothing?

You'll see no changes in Workday if you haven't set up this feature. NCI Eliminations won't be available in your tenant.

Related Information

- [Steps: Set Up for Persisting Noncontrolling Interest](#)
- [Set Up Elimination Rules for Noncontrolling Interest](#)
- [OfficeConnect - Financial Management - Getting Started](#)
- [Enable OfficeConnect for Workday Financial Management](#)

Unified Access Management (UAM)

We now enable Workday Adaptive Planning customers to:

- Create Adaptive Planning permission sets (action groups) in Workday.
- Assign permission sets to users based on security groups in Workday.
- Sync Workday security groups into Adaptive Planning to manage user access across the application.

Watch the video: 7m 45s

Business Benefits

By centrally managing security groups in Workday, administrators can automate:

- Permission set assignment.
- User access to reports, dashboards, modeling, and other application areas.

Changes

You can manage permissions and access for synced Adaptive Planning users from Workday.

When users are assigned to synced Workday security groups, we now include those groups when we send notifications in these areas:

- Processes.
- Reports.

You can now view and select these groups when you:

- Assign process tasks.
- Send notifications to process assignees.

What Do I Need to Do?

Note: To request this feature, contact your Named Support Contact to submit a Workday Customer Care request. After confirming that you're eligible, we'll enable the feature.

Verify these prerequisites:

- User sync is enabled.
- Workday security domains:
 - *Unified Security Administration*(Modify)
 - *Set Up: Adaptive Planning Group Sync*(Modify)
- Adaptive Planning permissions:
 - *Admin Access > Users*
 - *Admin Access > Permission Sets*

Complete these steps in Workday:

1. Run the **Migrate Adaptive Planning Permission Sets and Assignments** task.
2. Run the **User Permission Comparison Report** to verify that permission set assignments match between Adaptive Planning and Workday.
3. (Optional) Adjust any discrepancies in user permissions either in Workday or Adaptive Planning.
4. (Optional) If you're using ISU user:
 - a. Create an ISU user group and add the ISU user to this group.
 - b. Add the ISU user group to the **Maintain UAM User Integration** task.
5. Run the **Activate UAM Integration with Adaptive Planning** task.
6. Run the **Subscribe User Groups to Adaptive Planning** task and add security groups that you want to sync to Adaptive Planning.
7. (Optional) If you want to sync UAM data to Adaptive Planning in real time, run the **Notify Authorization Policy Changes to Adaptive Planning** task.

After you complete these configuration steps, user permissions will be managed from Workday and security groups will be synced to Adaptive Planning. You can then use synced Workday security groups in Adaptive Planning.

After implementing UAM, you can disable these APIs:

- permissionSets
- groups

What Happens If I Do Nothing?

You'll see no changes in Adaptive Planning. You'll continue to manage permission sets, assignments, and user groups in Adaptive Planning.

Change Log

UAM Support in Adaptive Planning Notifications

We update the Changes field to document that the notifications and processes features are now in Production.

Preview Date: 2024-11-08. Production Date: 2025-03-15.

UAM Support in Processes

We update the Changes field to document the ability to include synced Workday security groups in processes.

Preview Date: 2024-11-08. Production Date: 2024-12-13.

UAM Support in Adaptive Planning Notifications

We update the Changes field to document the ability to include synced Workday security groups in Adaptive Planning notifications.

Preview Date: 2024-11-08. Production Date: 2024-12-13.

Financial Planning Configuration Manager

With this release, we enable you to load balance sheet journal line actuals data for assets, liabilities, and equities.

Changes

- We provide a new Enable Balance Sheet checkbox.
- We set all Balance Sheet accounts to load actuals by balance.

You can now clear the external ID mappings that the Financial Planning Configuration manager creates when loading metadata into Planning.

Business Benefits

This reduces implementation time and supports multi-currency imports.

What Do I Need to Do?

- Select the Enable Balance Sheet checkbox in the Actuals section.
- Activate the planning configuration manager application.
- Allow the Orchestration to run in Adaptive Planning.
- Review the Balance Sheet integration objects.

What Happens if I Do Nothing?

Your planning configuration manager application will remain unchanged.

Change Log

We update the Changes field to document the ability to clear external mappings.

Actuals Import from Workday Financials

With this release, we provide additional Ledger Account and Account Summary validations.

Changes

We prevent selecting invalid account sets for the already selected company.

Business Benefits

We make it easier for you to import Actuals from Workday into Adaptive Planning.

Import Ending Balance Data for Balance Sheet from Workday Financials with High Volume Extract

With this release, we enable you to load balance sheet journal line actuals data for assets, liabilities, and equities using High Volume Extract.

Business Benefits

This enables single- and multi-currency balance sheet reporting for high data volumes.

Changes

- We provide a new "Ending Balance" amount type.
- We provide journal lines filtering by Balance Sheet Ledger Accounts and Summaries.

Release: 2024-09-21

Delete Inactive Orchestration Task

We now enable deleting inactive orchestration tasks.

Business Benefits

This improves the user experience, enabling you to remove inactive orchestrations you no longer need.

Changes

When you select an inactive orchestration task in Adaptive Planning Design Integrations, you can select **Delete this component** within the **Actions** pane. This deletes the inactive orchestration task.

Object Transporter 2.0

With this release, we continue to improve the functionality and usability of Object Transporter 2.0.

Changes

We now include these objects and metadata when you migrate Financial Planning Applications:

- Translated actuals.
- Balance sheet configuration.
- Time orchestration.
- Flexible account label concatenations.
- Flexible level label concatenations.
- Actuals End Period changes.

Business Benefit

You can now migrate all current configuration details in your financial planning configuration managers, decreasing time spent migrating applications during deployments and ongoing production enhancements.

See:

- [Steps: Migrate Packages with Object Transporter 2.0.](#)
- [Concept: Migrate Workforce and Financial Planning Applications Using Object Transporter 2.0.](#)

Financial Planning and Workforce Planning Configuration Managers

We continue to enhance the performance of data imports into Adaptive Planning for financial planning configuration managers and workforce planning configuration managers.

Business Benefits

This enables higher data volume and improves performance for planning configuration manager integrations.

Changes

We require that the registered API client in Workday include Workday Owned Scope for the Workday credential in Adaptive Planning Design Integrations.

What Do I Need to Do?

To enable Workday Owned Scope for the registered API Client of the Workday Credential in Adaptive Planning Design Integrations, you must:

1. Access the **Manage API Client** task in Workday.
2. Select the API client used by the Workday Credential in Adaptive Planning Design Integrations.
3. Select **Include Workday Owned Scope**.
4. Click **OK**.

You can select this now, before the Preview release.

What Happens if I Do Nothing?

If you don't select Workday Owned Scope, your Workday integrations will fail.

Setup Effort

Setup Required.

Change Log

Preview Release: 2024-11-08

We now deliver this feature to your Preview tenant and update the Release Note Type from Coming Soon to Feature.

Custom Concatenated Members

With this release we enable you to create custom level and account concatenations within a financial planning configuration manager.

Business Benefits

This reduces implementation time and enables creating planning-only concatenations, without requiring actuals activity.

Changes

We add a new optional Concatenations page after the Accounts page in the financial planning configuration manager.

The Concatenations page contains sections for creating:

- Level Concatenations with values selected from the Level Dimensions defined on the Levels page.
- Account Concatenations with values selected from Ledger Account, Revenue Category, and Spend Category.

Within both, you can select a:

- Primary concatenation.
- Secondary concatenation.
- Tertiary concatenation.

When you delete concatenations in the planning configuration manager, they don't automatically delete from Adaptive Planning. Delete the concatenated levels or accounts from Adaptive Planning, separately.

Changed or deleted concatenations don't display in the Preview Data page.

What Do I Need to Do?

If you want to use custom concatenations, access the Manage Financial Planning configuration manager and complete the Concatenations page.

Concatenation options come from the level dimensions in the Levels page.

For example, if Company and Cost Center are concatenated, then you can select from Company and Cost Center for the concatenations.

If you selected a third level dimension in the Levels page, populate all three concatenations for the level.

What Happens if I Do Nothing?

If you don't complete the Concatenations page, your planning configuration manager functions as it did, previously.

Reporting Model Size Limit

Preview Date : 2025-01-17. Production Date: 2025-03-15

We now introduce a limit on the size of the reporting model that users can load in OfficeConnect for Financial Management.

Business Benefits

The new limit on the model size ensures better performance and user experience in OfficeConnect.

Changes

We now support a maximum of 750K dimension members for the entire reporting model. If your model exceeds this limit, end users can't successfully load it in OfficeConnect.

What Do I Need to Do?

Nothing. The new limit is enforced during model load in OfficeConnect.

What Happens If I Do Nothing?

If your reporting model exceeds the size limit, it fails to load in OfficeConnect. An administrator must reduce the model size by either:

- Removing a large dimension.
- Selecting a lower level in the dimension hierarchy.

2024R1 Release Notes

2024R1 Service Pack Release Notes

Release: 2024-07-26

[Exclude from Spend as a Dimension](#)

Release: 2024-07-19

[Dimension Rollups Include Values for Dimensions Outside the Hierarchy](#)

Release: 2024-06-21

[Additional Fields for Show Details](#)

Release: 2024-06-14

[Display All Compensation Currency Values](#)

Release: 2024-05-24

[OfficeConnect - Miscellaneous Enhancements](#)

Release: 2024-05-10

- [End of Version Field Changes to End of Plan](#)
- [Changes to User Interface](#)
- [User Administration](#)
- [Adaptive Planning Translations](#)

Financial Planning Configuration Manager:

- [Select Custom Worktags and Organizations as Dimensions and Levels](#)

- [Intercompany Affiliate as a Dimension](#)
- [Select Revenue and Spend Category as Dimensions](#)
- [Select Actuals Start Date After Activation](#)
- [Top Level Hierarchy for Dimensions](#)
- [Clear External Mappings](#)
- [Label Flexibility for Accounts and Levels](#)

Publish Financial Plans:

- [Plan Publishing Performance and User Experience Enhancement](#)

Actuals Import from Workday Financials:

- [Retained Earnings and Ending Balance](#)

Release: 2024-04-26

[Migrate Financial Planning Application](#)

Release: 2024-04-12

- [Search Bar for Sheet and Report Metrics](#)
- [Changes to User Interface](#)
- [Loan Worktag](#)
- [Adaptive Planning Permissions](#)

Modeled Sheet Data Validations:

- [Type Prompt for Validation Logic](#)
- [Rename Prompts in the Create and Edit Rule Popups](#)
- [Maximum 10 Active Validation Rules](#)
- [Data Validations on Sheets Created by Planning-Only Workforce Planning Configuration Managers](#)

Release: 2024-04-05

[Links from Active Workforce Planning Configurations to Model](#)

Release: 2024-03-29

Bottom-Up Workforce Planning:

- [Restrict Form Selections to Allowed Organizations](#)
- [Restrict Date Selections Outside Plan Date Range](#)
- [Unsaved Changes Warning When Changing Effective As Of Date on Existing Position Change](#)

Adaptive Planning Translations

We expand our local language support by adding Danish, Finnish, Norwegian, and Thai to Adaptive Planning.

Adaptive Planning Translations

Release: 2024-05-10

We now provide translations for Adaptive Planning users in:

- Danish
- Finnish
- Norwegian
- Thai

Adaptive Planning User Experience

We continue to align the Workday Adaptive Planning interface with Workday to provide a more consistent user experience.

Link to Location from Account and Level Searches

Release: 2024-03-09

To provide more insights as you manage accounts and levels, we improve the search functions in the Modeling area. We provide a new link in the Location column of the search results. When you click the link, we return you to the hierarchy list where we highlight the specific account or level in place. This feature enables you to see the placement of the account or level in the hierarchy.

Welcome Page

Release: 2024-03-09

We provide a new Top Apps section on the Welcome page, giving you quick access to Sheets, Reports, and Dashboards.

New Look for Model Management and Administration

Release: 2024-03-09

We update the look of the Model Management and Administration pages, aligning it with Workday user interface and accessibility standards.

Changes to User Interface

Release: 2024-05-10

To provide a more consistent user experience, we update the Adaptive Planning user interface by now:

- Removing the blue banner on overview pages across all product areas.
- Moving the Add New button on the Sheets, Reports, and Dashboards overview pages to a new location below the top menu bar.
- Formatting search fields and data tables with round corners.
- Changing icon color, size, and style.
- Formatting cube sheet alternative dimension filters with borders.

User Administration

Release: 2024-05-10

To improve the user experience and accessibility, we now provide new interfaces for the Administration landing and user management pages. From the new UI pages, we now provide:

- In-context actions menu to edit, email, and delete users.
- Real-time validation messages while editing user fields.
- Auto-population for some fields such as Salesforce username and NetSuite email.
- Improved pagination which maintains the original page state.

To view the new UI pages, you must first enable these options from the Visual Preferences page under Administration:

- Administration Landing
- Administration Users

See [Change Visual Preferences](#).

New Planning Center for Insights into Your Model

With the 2024R1 Release, we provide a new tile called Planning Center in the Modeling area. From the Planning Center, we enable to use:

- **Configuration Metrics:** Keep an eye on the main elements in your model. Color coding helps you pinpoint the areas of the model that present the most risk to performance.
- **Sheet and Report Metrics:** Track performance and usability of reports and sheets. Usage metrics offer you a better understanding of the adoption and usage patterns of your team.

You can review the metrics for a day or for a time range. From the toolbar, you can select a 31-day time range within the previous 90 days.

Note: The Planning Center is not available to customers in Singapore at this time.

Watch the Video: 4m 15s

Configuration Metrics

Release: 2024-03-09

We now provide Configuration Metrics in the new Planning Center section of Modeling to help you monitor changes to your model over time and provide insights to possible performance issues.

In the Configuration Metrics, we provide the following metrics as KPI charts:

- Levels, including parents and leaf levels.
- Versions
- Dimensions
- Dimension values
- Dimension attributes
- Sheets, both user-assigned and level-assigned.
- Snapshot reports
- Shared reports
- Custom accounts
- Cube Calculated Accounts
- Modeled Calculated Accounts
- Linked Accounts

You can review the metrics for a day or for a time range. From the toolbar, you can select a 31-day time range within the previous 90 days. Each chart displays the number of values, according to the selected time range, with a line graph that displays changes over time. We also provide color indications that let you know when your current numbers are above or below our benchmarks.

See [Check Configuration Metrics](#).

Sheet Metrics

Release: 2024-03-09

We provide a new Sheet Metrics section in the new Planning Center section of Modeling. With Sheet Metrics we enable you to review the performance and usage patterns of your sheets. You can review the metrics for a day or for a time period that you define.

We provide these details:

- **Name:** The name of the sheet.
- **Type:** The type of sheet — standard, modeled, or cube.
- **Views:** How often the sheet was opened.
- **Distinct Views:** How many unique users opened the sheet.
- **Saves:** How often people saved changes to the data in the sheet.

- Average Time to Open: How long it takes to load the sheet based on the actual performance.
- 95pct Time to Open: How long it takes to load the sheet in the worst case scenario, after ignoring the top 5% to remove anomalies and outliers.

See [Check Sheet Metrics](#).

Report Metrics

Release: 2024-03-09

We provide a new Report Metrics section in the new Planning Center section of Modeling. With Report Metrics we enable you to review the performance and usage patterns of all shared reports and snapshots in your model. You can review the metrics for a day or for a time period that you define.

We provide these details:

- Name: The name of the report.
- Type: The Type of the report — matrix, model, pattern, or transaction.
- Views: How often users viewed the report.
- Distinct Views: How many unique users viewed the report.
- Average Time to Open: How long it takes to load the report based on the actual performance.
- 95pct Time to Open: How long it takes to load the report in the worst case scenario, after ignoring the top 5% to remove anomalies and outliers.

See [Check Report Metrics](#).

New Planning Center Permission

Release: 2024-03-09

We provide the new Planning Center permission within the Model Management Access permission set in the Administration area. The permission enables users to access the Planning Center in the Modeling area.

Add this new permission to existing permission sets to provide access to the Planning Center.

See [Reference: Available Permissions](#).

Search Bar for Sheet and Report Metrics

We now provide a new search bar in Sheet Metrics and Report Metrics. For your convenience, you can filter the sheets and reports based on your typed input.

Personal What-If Scenarios

With the 2024R1 release, we introduce what-if scenarios. With scenarios, we now enable you to test data changes in separate scenarios without affecting the data in your plan version. Reports and dashboards also support scenarios enabling you to build reports and charts to compare and analyze your changes. We also enable you to merge those changes with your plan versions with a few clicks.

Watch the video: 6m 17s

New Scenarios Option in the Main Menu

Release: 2024-03-09

We provide a new option in the main menu called Scenarios, which opens the Scenario Manager page. We also provide an Add New button, which enables you to create up to a total of 15 new scenarios. We enable you to base scenarios on any plan version that you can access. For your convenience, in the list of scenarios, we provide these columns that you can sort:

- Scenario Name.

- Base Version.
- Created On.
- Created By for users with the Manage Scenarios permission.

We also display the descriptions. We provide these options in the toolbar:

- Search: Locates matches as you type.
- All Versions: Filters the list by the base version.
- Scenario Capacity Usage: Compares the number of scenarios you have to the maximum.
- Trash: Deletes selected scenarios and the data changes you made in the scenarios.

See:

- [Concept: Personal Scenarios.](#)
- [Create Personal Scenarios.](#)

Scenario Tabs in the Left Panel

Release: 2024-03-09

We provide dynamic tabs on the Scenario Manager page based on your permissions:

- For users with Access Scenario Manager permission or Create Scenarios permission, we don't provide any tabs. We provide a list of your scenarios.
- For users with the Merge Scenarios permission, we provide the Personal and Merged tabs. The Personal tab displays all the scenarios that you created. The Merged tab displays all the scenarios that you merged.
- For users with the Manage Scenarios permission, we provide the All Scenarios, Personal, and Merged tabs. All Scenarios displays the scenarios that you created and the scenarios that all other users created. Merged displays the scenarios that you merged and the scenarios that all other users merged.

See [Concept: Personal Scenarios.](#)

Scenarios Actions Menu

Release: 2024-03-09

From the Scenario Manager page, we provide these options in the Actions Menu when you hover over a scenario in the list:

- Edit: Change the name, description, and the system-generated code of your scenarios.
- Delete: Delete the scenario definition and the data changes that you have made in the scenario. This option is the only option available to users with Manage Scenario permission for scenarios that don't belong them.
- Duplicate: Create a new scenario as a duplicate of an existing scenario.
- Merge: Update the base version with the changes you have made in your scenario. When you merge, we delete the scenario as we move all data into the base version. We automatically save a record of the scenario definition in the Merged tab. We provide the Merged tab to users with the Merge Scenarios permission.
- Download Changes: Review all changes across all sheets from 1 Excel file. We display this option for users with the Download Scenario Changes permission.

See:

- [Create Personal Scenarios.](#)
- [Download and Review Scenario Changes.](#)
- [Merge Personal Scenarios into Base Versions.](#)

Download Changes

Release: 2024-03-09

With the Download Changes action, we enable you to review all the changes you made in your scenario across the model. We provide this capability so that you can review your changes before you merge the scenario. The Excel file includes these tabs:

- Standard: All changes in your general ledger, custom, and assumption accounts.
- Separate tabs for each modeled sheet with changes.
- Separate tabs for each cube sheet with changes.

In the Excel file, we provide:

- Action columns in the Standard tab and the modeled sheet tabs. The column indicate the kind of change you made in the scenario: Add, Change, Delete.
- Data location, which includes the time period.
- The original data in the base version.
- The change in the scenario.

The Download Changes action only display when you have the Download Scenario Changes permission. An administrator must assign this permission to permission sets. We recommend you give this permission to anyone with the Merge Scenarios permission.

See [Download and Review Scenario Changes](#).

Scenarios in the Version List

Release: 2024-03-09

We enable you to access scenarios that you create from the version prompts in sheets, reports, OfficeConnect, and dashboards. In the version list, scenarios nest within their base versions. In the list, we provide a new icon to further differentiate scenarios from versions. We provide an expand arrow next to versions that have scenarios.

From dashboards and sheets, we also enable you to create scenarios with the New Scenario button at the bottom of the version list.

For instances with Sales Planning, we provide a drop-down menu when you click New Scenario with these new options:

- Create new version.
- Create new scenario.

New Scenario Permissions

Release: 2024-03-09

We provide the following new permissions to support scenarios:

- Access Scenario Manager: Enables you to open the Scenario Manager page.
- Create Scenarios: Enables you to create scenarios and review your changes in sheets, reports, OfficeConnect, and dashboards.
- Merge Scenarios: Enables you to merge the changes in your scenario into the base version. Also enables you to review the scenario definitions in the Merge tab.
- Manage Scenarios: Enables you to review and delete the scenario definitions of other users. This permission doesn't provide access to the data in the scenarios of other users.
- Download Scenario Changes: Enables you to download the changes in your scenario for all sheets to a single Excel file. To enable the ability to download scenario changes, an admin must add the permission to the permission sets.

With the 2024R1 Release, we automatically add these permissions for any Permission Set with the Editable Sheet Access permission:

- Access Scenario Manager
- Create Scenarios
- Merge Scenarios

In addition, we also automatically add the Manage Scenarios permission to any Permission Set with the Versions permission.

See [Reference: Available Permissions](#).

Scenarios in Sheets

Release: 2024-03-09

When you edit a sheet for a scenario version, we now display these visual changes:

- Green background on cells for changes that you made for this scenario version. You can continue to change this data. For changed rollup cells in scenario versions, we continue to display the cells with a blue background.
- Strikethrough text for when you deleted this row for this scenario version.

When you edit sheets for scenario versions, we now disable your ability to:

- Add, edit, or remove sheet cell notes.
- Add sheet notes.
- Calculate formula values.
- Change your display options to set your sheet view as default for all users.
- Drill into NetSuite, Drill into Transactions, or Drill into Workday.
- Publish the plan.
- Show anomalies in standard sheets.
- Sync levels from sheets.
- Use consolidations functionality.

When you select a scenario version on the Sheets Overview page, we now disable your ability to:

- Search audit trails.
- Search cell notes.
- Update Workflow statuses.

See:

- [Add Rows in Modeled Sheets](#).
- [Add Splits in Modeled Sheets](#).
- [Add Splits in Standard Sheets](#).
- [Add Rows in Cube Sheets](#).
- [Copy Forward and Downward](#).
- [Break Back Data in Time Rollups](#).
- [Break Back Data in Account, Level, and Dimension Rollups](#).
- [Adjust the Values of Multiple Cells](#).
- [Concept: Scenarios and Sheets](#).
- [Reference: Colors and Notations in Sheets](#).

New Version Options for Scenarios

Release: 2024-03-09

We provide the following new check boxes when you clone versions:

- Copy all scenarios: Keeps the scenarios in the copied version and copies them into the new version.
- Move all scenarios: Removes the scenarios from copied version and adds the scenarios to the new version.

See [Reference: Settings for Plan Versions](#).

Scenarios in Web Reports

Release: 2024-03-09

You can now add what-if scenarios as versions to your matrix reports. In the matrix report builder, you can add scenarios to:

- Rows or columns
- Parameters
- Filters
- Calculation elements

Scenarios in Dashboards

Release: 2024-03-09

You can now select personal what-if scenarios from:

- The main page version drop-down.
- The chart version drop-downs in chart settings.

Dashboard charts visualize the data based on the scenarios you select.

Note: Dimension mapping tables are view only when you select a scenario from the main page version drop-down.

Scope Calculations on Sheets

With the 2024R1 Release we now enable you to improve the performance of sheets. We provide a new tab in the Sheet Properties that enables you to set a start and end time for the calculations on each sheet. The sheet performs better when it has fewer cells to calculate.

Watch the Video: 5m 10s

Scope Tab in Sheet Properties

Release: 2024-03-09

We now enable you to improve the performance of sheets by limiting the time period for calculations. We provide a new Scope tab in the Sheet Properties when you're building cube and modeled sheets in the Modeling area. In the Scope tab we enable you to set a start and end time period for the calculations.

See:

- [Set the Scope for Calculations in Cube and Modeled Sheets](#).
- [Concept: Calculation Scope for Modeled and Cube Sheets](#).

Dynamic Time Periods for Calculations Scope

Release: 2024-03-09

To improve efficiency, we provide dynamic scope ranges so that the scope of the sheet automatically adjusts based on your version settings. We enable you to offset the range based on the:

- Completed Values Through period for Actuals data.
- Start of Plan period for Plan versions.

See [Set the Scope for Calculations in Cube and Modeled Sheets](#).

Sheet Cell Colors and Notations for Calculation Scope

Release: 2024-03-09

From the sheet view, we display these indicators for cells of calculated accounts that are outside the range of scope:

- A purple triangle to indicate the data is formula-driven.
- Gray background to indicate that the cell is read-only because it has a formula.
- Blank to indicate that the sheet isn't calculating the data because it's out of range.

End of Version Field Changes to End of Plan

Release: 2024-05-10

To better align the scope settings with version settings, we change the name of the End of Version field to End of Plan. The functionality remains the same.

Code Fields for Metadata

We now provide code fields that you can change for metadata throughout the model, including codes for sheets, account groups, and the containers of custom dimensions and attributes.

Watch the video: 4m 45s

Sheet Codes for Cube and Modeled Sheets

Release: 2024-03-09

We change the existing field name for Account Code Prefix to Code on the Details tab of the Sheet Properties for modeled and cube sheets in the Modeling area. We also enable you to edit the Code. When you edit the codes of modeled and cube sheets, you also change the account codes in the sheet.

For consistency, we also change the Account Code Prefix field to Code when you build new modeled and cube sheets.

See:

- [Change Sheet Properties of Modeled Sheets](#).
- [Reference: Sheet Properties for Cube Sheets](#).

Account Group Codes

Release: 2024-03-09

We add a new Code field for account groups. We also enable you to edit the Code field in these hierarchies:

- Assumptions.
- Cube accounts.
- Custom accounts.
- Metric accounts.
- Modeled accounts.

With the 2024R1 Release we generate the codes of existing account groups to match the current name of account groups. We replace spaces and special characters with underscores.

See: [Reference: Settings for Account Groups](#)

Container Codes for Dimensions and Attributes

Release: 2024-03-09

We add new Code fields for dimension and attribute containers. We also enable you to edit the codes associated with the dimension and attribute containers. Example: You can edit the Product dimension code, not just the codes of the Product dimension values.

As of this release, we update all existing formulas that reference containers in dot notations or term modifiers to use the code. We now require you to use the code in formulas. This requirement frees you to use special characters and spaces in the names.

With the 2024R1 Release, we generate the codes of existing dimension and attribute containers to match the current name of the container.

See:

- [Create Attributes.](#)
- [Create Custom Dimensions.](#)

Account Group Codes in APIs

Release: 2024-03-09

When you export accounts with the exportAccounts API, we provide a new Boolean showAccountGroupCodes attribute in the include element. Setting this attribute to true in requests exports account group codes in the response.

Note: The showAccountGroupCodes attribute is only available in API v38 and above.

Sheet Codes in the importModeledSheet API

Release: 2024-03-09

When you import a modeled sheet with importModeledSheet, we now require a name and code attribute in the configurableModel element.

Note: The name and code attributes are only available in API v39 and above.

Sheet codes in the exportSheets API

Release: 2024-03-09

When you export sheets with the exportSheets API, we rename the prefix attribute to code in the modeled-sheet element.

Note: The code attribute is only available in API v39 and above.

Dimension Codes in APIs

Release: 2024-03-09

We now provide a code attribute for the dimension element in:

- exportDimensions
- updateDimensions

Note: The code attribute is only available in API v39 and above.

Attribute Codes in APIs

Release: 2024-03-09

We now provide a code attribute in the attribute element of:

- updateAttributes

- `exportAttributes`

Note: The code attribute is only available in API v39 and above.

Headcount Planning Application

When you perform bottom-up, position-level workforce planning, you can now secure who can see compensation data during headcount planning for more control over your data. When you generate headcount plans and headcount forecast plans, you can also now quickly include all subordinate organizations of your selected supervisory organization, and use more intuitive plan start and plan date periods to pick your plan time range.

Note: To use this feature, we require you to configure the workforce planning configuration manager feature with the Use Plan and Execute Tasks option selected.

Plan Start Date and Plan End Date Prompts

Release: 2024-03-09

When you select your Plan Start Date and Plan End Date on these tasks, you can now select periods instead of calendar dates:

- Configure Headcount Plan
- Create Forecast

See:

- [Create Headcount Plans](#).
- [Create Headcount Forecast Plans](#).

Note: We don't automatically convert calendar dates to periods on existing headcount plans and headcount forecast plans. You can continue to use these existing plans with calendar dates, but any new plans use periods.

Secure Compensation Data

Release: 2024-03-09

We add a new Secure Data check box column on the Sheet Definition table of Roster Sheet page on the Manage Workforce Planning Configuration task. The check boxes on this new column enable you to secure any compensation-related fields on reports to only users who have access to the Compensation Details: Headcount Planning domain.

We now automatically select this check box for rows that use these report fields:

- Compensation Basis Amount
- Compensation Grade

We also add new Secure Data Check Box Updated text on the Review Changes & Activate page when you make changes to these check boxes.

Note: On existing workforce planning applications, we don't automatically select the new check box for rows that use these report fields:

- Compensation Basis Amount
- Compensation Grade

We also restrict you from selecting the check box for rows with the report fields on existing workforce planning applications.

See [Manage Workforce Planning Configurations](#).

Include Subordinate Organizations Check Box

Release: 2024-03-09

We add a new Include Subordinate Organizations check box on the Configure Headcount Plan task, saving you time by enabling you to include all subordinate organizations of your selected parent supervisory organizations. We only display the new check box when you don't select a Top Level Hierarchy.

See [Create Headcount Plans](#).

Restrict Form Selections to Allowed Organizations

Release: 2024-04-12

When you add or edit positions on your headcount or headcount forecast plans, we now display a warning when you select organizations that aren't allowed on your supervisory organization. You can still select the organizations.

We display the warning when you create or edit positions on your headcount plans or headcount forecast plans using these My Tasks items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

We also display the warning when plan administrators create or edit positions on plans using the Launch button on the View Headcount Planning Configuration report.

See [Complete Headcount Planning Participant Detail Events](#).

Restrict Date Selections Outside Plan Date Range

Release: 2024-04-12

When you create or edit positions on your headcount or headcount forecast plans, we now restrict your Position Start Date entries to dates within the plan date range. For clarity, we also update the warning message when you enter an invalid date on the Effective As Of prompt.

We restrict date entries when you create or edit positions on your headcount plans or headcount forecast plans using these My Tasks items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

See [Complete Headcount Planning Participant Detail Events](#).

Unsaved Changes Warning When Changing Effective As Of Date on Existing Position Change

Release: 2024-04-12

When you edit an existing position change, we now display a warning dialog that you're discarding unsaved changes and refreshing the form when you update a field and either:

- Change the Effective As Of date.
- Clear the Effective As Of date.

We display the dialog when you edit existing position changes on your headcount plans or headcount forecast plans using these My Tasks items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

See [Complete Headcount Planning Participant Detail Events](#).

Display All Compensation Currency Values

Release: 2024-06-14

When you include Compensation Currency on your headcount plans or headcount forecast plans, we now always display all Compensation Currency values on the dropdown menu when you create or edit

positions. This enables you to plan for positions using those compensation currencies even if you don't have access to those currencies through currency-related domain security.

We display all Compensation Currency values when you create or edit positions on your headcount plans or headcount forecast plans using these My Tasks items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

See [Complete Headcount Planning Participant Detail Events](#).

Change Log

Headcount Planning Application

We update this release note to change the feature title from "Bottom-Up Workforce Planning" to "Headcount Planning Application."

Preview Date: 2024-02-03. Production Date: 2024-03-09.

Headcount Plan Data Source

With this release, we now provide a reporting data source for all headcount plans generated using the Bottom-Up Workforce Planning feature, enabling you to create headcount plan vs. actuals reports and custom headcount planning reports. With these reports, you can more easily monitor, analyze, and react to your headcount planning data.

Note: To use this feature, we require you to configure the workforce planning configuration manager feature with the Use Plan and Execute Tasks option selected, and have used the Bottom-Up Workforce Planning feature for your headcount plan.

Bottom-Up Headcount Plans Report Data Source

Release: 2024-03-09

Workday delivers a new high-performance indexed Bottom-Up Headcount Plans report data source (secured to the Reports: Headcount Planning domain) that you can use to create custom reports for headcount plan lines per position.

Headcount Plan Line Details Report Fields

Release: 2024-03-09

We deliver existing report fields on the Headcount Plan Line Details business object (secured to the Public Reporting Items domain) that you can use in condition rules and custom reports for headcount planning. We add these report fields based on the fields that you use on your headcount planning application.

Compensation Details Domain and Report Fields

Release: 2024-03-09

With this update, we deliver a new Compensation Details: Headcount Planning domain (secured to the Adaptive Planning for the Workforce functional area) that you can use to secure access to compensation data during headcount planning and in headcount planning reports.

We also deliver these new report fields on the Headcount Plan Line Details business object (secured to the Compensation Details: Headcount Planning domain) for headcount planning:

- Compensation Basis Amount
- Compensation Grade

For condition rules and custom reports, we secure access for the report fields to the Public Reporting Items domain.

Planning Configuration Manager

With this release we enable you to make changes to your Planning Configuration after activation, improving the user experience and reducing implementation time.

Change Planning Configuration Manager after Activation

Release: 2024-03-09

After you activate a Planning Configuration Manager, you can now:

- Add a related worktag type as an attribute to existing levels, custom dimensions, and ledger accounts.
- Change metadata filters for levels and custom dimensions.
- Change the top level hierarchy and its filters for levels and custom dimensions.
- Add worktag type as a new custom dimension.
- Add a roster sheet attribute, custom dimension, or text column.
- Change data filters for actuals data.
- Change account summary mapping.
- Change ledger account exclusions.

You can't:

- Remove attributes from the Planning Configuration Manager.
- Remove a custom dimension from the Planning Configuration Manager.
- Change account concatenations.
- Modify secondary and tertiary dimensions in a level from the Financial Planning Configuration Manager.

See [Manage Workforce Planning Configurations](#).

Display ISU on Security Page

Release: 2024-03-09

We now display the ISU on the Security page of these tasks so that you can more easily fix any ISU security issues that prevent you from activating the planning configuration manager:

- Manage Financial Planning Configuration.
- Manage Workforce Planning Configuration.

See [Manage Workforce Planning Configurations](#).

Links from Active Workforce Planning Configurations to Model

Release: 2024-05-10

When you edit an active workforce planning configuration manager on the Manage Workforce Planning Configuration task, we add a new View Details link on these pages so that you can access those model objects in Adaptive Planning:

- Roster Sheet.
- Version.

We also add a new Details table column with a View link on these pages:

- Dimensions.
- Level.
- Preview Data.

See [Manage Workforce Planning Configurations](#).

Financial Planning Configuration Manager

With this release, we simplify the configuration of Adaptive Planning for Financials customers by enabling you to automatically create and maintain planning data and metadata from one location. This reduces implementation time while improving the user experience.

Note: This feature is only available to customers who are implementing Adaptive Planning for Financials for the first time. You must contact your Named Support Contact or Professional Services/Implementer to enable this feature. This functionality is only available to Adaptive Planning Limited Preview customers at this time. We plan to make this feature generally available on 2024-05-10.

Watch the video: 6m 6s

Manage Financial Planning Configuration Task

Release: 2024-02-03

We deliver a new **Manage Financial Planning Configuration** task (secured to the *Set Up: Adaptive Planning* domain) that you can use to quickly create in Adaptive Planning:

- A level hierarchy by concatenating Workday dimensions.
- Dimensions, dimension values, and dimension attributes.
- Asset, Liability, Equity, and Income Statement accounts mapped to Workday ledger account summaries.
- Time strata for default and alternate calendars.
- Corporate and reporting currency with currency exchange rate mapping.
- Actuals Version.
- Actuals from managed journal line summaries in Workday.
- Integration data sources. Integration metadata and data loaders.
- Integration tasks with metadata and data refresh schedules.
- A Workday external system.

Create or Select Financial Plan Structures

Release: 2024-02-03

We enable you to select or create a Financial Plan Structure to automatically populate dimensions based on that plan structure.

Note: Selecting a plan structure after configuring the other sections changes those configurations.

Preview Data

Release: 2024-02-03

We enable you to preview what will load from Workday Financials into Adaptive Planning, to help you verify your configuration before you activate it.

Security

Release: 2024-02-03

To help prevent downstream errors, we restrict you from progressing past the Security page or activating a financial planning configuration manager until you:

- Give your Integration System User (ISU) access to all data sources and report fields on the financial planning configuration manager.
- Select the functional areas for all data sources and report fields on the financial planning configuration manager on your API Client Scope.

Load Splits in Standard Sheets

Release: 2024-02-03

With this release, we support splits for standard sheets loading through the Financial Planning Configuration Manager.

Select Custom Worktags and Organizations as Dimensions and Levels

Release: 2024-05-10

In this release, we enable you to select your Custom Worktags and Organizations as dimensions and levels.

Intercompany Affiliate as a Dimension

Release: 2024-05-10

You can now select Intercompany Affiliate as a list dimension in your financial planning configuration.

Select Revenue and Spend Category as Dimensions

Release: 2024-05-10

You can now select Revenue and Spend Category as dimensions. This enables you to:

- Concatenate ledger accounts with revenue and spend categories.
- Use revenue and spend categories as dimensions in Adaptive Planning.

Select Actuals Start Date After Activation

Release: 2024-05-10

You can now select an Actuals Start Date after you activate, enabling you to:

- Backfill of historical metadata and actuals into Adaptive Planning.
- Select shorter activation-period windows to decrease iteration time during deployments.

Top Level Hierarchy for Dimensions

Release: 2024-05-10

You can now filter actuals data by specifying a Top Level Hierarchy for all included dimensions.

Clear External Mappings

Release: 2024-05-10

You can now clear the external ID mappings that the financial planning configuration manager creates when loading metadata into Adaptive Planning. This streamlines the production migration process at the end of deployments by avoiding mapping conflicts when cloning an implementation tenant.

Label Flexibility for Accounts and Levels

Release: 2024-05-10

You can now customize the display names and concatenation delimiters for accounts and levels at each hierarchy tier to improve readability.

Plan Publishing Performance and User Experience Enhancement

With this release, we continue to improve the financial plan publishing experience. We automatically enable the more performant and user-friendly publishing experience for all existing and new publishing customers.

Watch the video: 2m 40s

Streaming Data for Plan Publishing

Release: 2024-02-03

With this release, we enable streaming for plan publishing data. This improves performance, increasing data volume and speed.

See [Publish Financial Plans from Adaptive Planning](#).

Error Codes for Publish Financial Plans

Release: 2024-05-10

We now include error codes in the publish details, enabling you to view cause and solution information for specific errors.

Note: You must contact your Named Support Contact or Professional Services/Implementer to enable this feature.

Object Transporter 2.0

With this release, we continue to improve the functionality and usability of Object Transporter 2.0.

Migrate Headcount Planning Application

Release: 2024-03-09

With this update, Workday enables you to migrate the Headcount Planning Application object between tenants using Object Transporter 2.0.

See [Troubleshooting: Migrate Workforce Planning Application Using Object Transporter 2.0](#).

Migrate Financial Planning Application

Release: 2024-05-03

With this update, Workday enables you to migrate the Financial Planning Application object between tenants using Object Transporter 2.0.

See:

- [Steps: Migrate Packages with Object Transporter 2.0](#).
- [Concept: Migrate Workforce and Financial Planning Applications Using Object Transporter 2.0](#).

Modeled Sheet Data Validations

We continue to enhance your ability to use data validation rules for user-entered data on modeled sheet cells, enabling you to filter for rows that violate your validation rules. This makes it easier and faster to correct invalid data.

Display only rows with data validation errors Check Box

Release: 2024-03-09

We add a new Display only rows with data validation errors check box on the Display Options of your modeled sheets, enabling you to filter for rows that violate validation rules set up by your model administrator.

Clone, Download, and Upload Modeled Sheets

Release: 2024-03-09

When you create new modeled sheets in Model Management, we now include validation rules when you:

- Clone an existing modeled sheet.
- Download a modeled sheet, edit that file, and upload a new modeled sheet using that file.

Scenarios in APIs

Release: 2024-03-09

The exportVersions API enables you to set a Boolean scenarios attribute in the include element of requests to return scenarios in the response. The response body indicates type="SCENARIO" for scenarios.

Note: You must use API v37 or higher.

Type Prompt for Validation Logic

Release: 2024-04-12

When you create or edit a rule for your modeled sheet in Model Management, we add a new Type prompt that enables you to select whether the validation displays an error when the data either:

- Meets the conditions of the rule.
- Fails the conditions of the rule.

See [Set Up Modeled Sheet Data Validation Rules](#).

Rename Prompts in the Create and Edit Rule Popups

Release: 2024-04-12

For clarity, we rename these prompts when you create or edit data validation rules for your modeled sheet in Model Management:

- Rule Name to Name.
- Validation Expression to Expression.
- Validation Help Text to Help Text.

We also update the hover text for the Action prompt.

See [Set Up Modeled Sheet Data Validation Rules](#).

Maximum 10 Active Validation Rules

Release: 2024-04-12

Instead of restricting you to a maximum of 10 validation rules, we now enable you to have up to 10 maximum active validation rules.

See [Set Up Modeled Sheet Data Validation Rules](#).

Data Validations on Sheets Created by Planning-Only Workforce Planning Configuration Managers

Release: 2024-04-12

We now enable you to use data validation rules on sheets that you created using a workforce planning configuration manager with the Plan in Adaptive Planning purpose.

See [Set Up Modeled Sheet Data Validation Rules](#).

Report Scheduling

We now enable report users to schedule live and snapshot matrix reports, eliminating the need to manually select and share recurring reports with select users.

Schedule Report Snapshots

Release: 2024-03-09

We now enable you to schedule shared matrix report snapshots with an optional notification. The notifications include the links to the snapshot reports. The recipients see the data that's accessible to the schedule creators.

See:

- [Create Schedules](#)

- [Concept: Report Scheduling](#)
- [Manage Schedules](#)

Schedule Live Report Notifications

Release: 2024-03-09

We now enable you to schedule live matrix report notifications. The notifications include the links to the live reports.

See

- [Create Schedules](#)
- [Concept: Report Scheduling](#)
- [Manage Schedules](#)

Report Scheduling Permissions

Release: 2024-03-09

We now introduce these new permissions for report scheduling:

- Create Report Schedules
- Manage all Report Schedules

See [Reference: Available Permissions](#)

Reports Performance

In this release, we continue to expand matrix report coverage for improved performance and scalability. We add support for additional functionality.

Supported Features

Release: 2024-03-09

We now support the Repeating Reports matrix report feature for improved performance and scalability.

Note: This functionality is now generally available.

See [Reference: Adaptive Planning Reports Performance](#).

Weighted Average Rollup

Release: 2024-03-09

The matrix report optimized path now supports the Weighted Average Rollup account field for improved performance and scalability.

See [Reference: Adaptive Planning Reports Performance](#).

OfficeConnect - Miscellaneous Enhancements

Refresh for Multiple Worksheets

Release: 2024-03-09

During refresh of multiple worksheets, we now display the messages list docked at the bottom of the screen. You can then move the messages list and dock it anywhere on the screen for your convenience. We use your last docking position and size to display any future refresh messages.

Also, the messages list starts displaying as soon as refresh completes for one of the worksheets. If you want, you can close the messages list. As refresh completes for the remaining worksheets, the messages list can reopen if necessary.

Primary Ledger Currency

Release: 2024-03-09

For OfficeConnect for Financial Management, we now rename Company currency to Primary ledger currency in the workbook properties. The renaming is consistent with the introduction of alternate ledger currency.

Performance for Expanding Multiple Elements

Release: 2024-03-09

We now significantly improve the performance when you expand a row or column where you've applied multiple elements. Previously, OfficeConnect appeared to hang when you tried expanding more than 3 elements. You experience the improved performance only when you select the **Exclude rows with no data** option.

Log Out from OfficeConnect for Word or PowerPoint

Release: 2024-03-09

When you click Log Out in OfficeConnect for Word or PowerPoint, we now automatically sign you out of both applications.

When you click Log Out in OfficeConnect for Word or PowerPoint and you're simultaneously signed into these other applications, we won't automatically sign you out:

- OfficeConnect for Excel
- Excel Interface for Planning

See:

- [About OfficeConnect for Word](#)
- [Start OfficeConnect for PowerPoint](#)

Configure Regional Settings

Release: 2024-03-09

We now enable you to manage your regional settings from the Manage Tenants option on the OfficeConnect sign in page.

If you use a regional gateway and authentication service and you've previously set up a regional connection, it now displays as Default. To change this connection, you can use the **Manage Tenants** option. To set up a new regional connection, you can use the **Set Up Tenants** option.

See [Steps: Set Up Tenant Connections](#)

Data Model UI Updates

Release: 2024-03-09

For OfficeConnect for Financial Management, we made some backend changes to the Set Up Financial Reporting and Analytics Data Model task. Consequently, these sections in the data model display some visual changes:

- Versions: We now have a Version table for plans and actuals.
- Dimensions: We've now renamed the Dimension column header to Cube Field.
- Show Details: We've now renamed the Field column header to Cube Field. Also, we've added these columns:
 - Version Types: You can now use the Show Details option for the configured version types.
 - Report Sort Direction: You can now sort the report data alphabetically.

See [Set Up the Financial Reporting Data Model](#).

Enable as Optional Hierarchy Setting

Release: 2024-05-24

For OfficeConnect for Financial Management, you can now configure optional hierarchies for the Project dimension in the Financial Reporting and Analytics Data Model. You can then report on the optional hierarchy in OfficeConnect.

See [Setup Considerations: Project Hierarchies](#)

Additional Fields for Show Details

Release: 2024-06-21

With this release, we enable you to configure Journal Number for Show Details in the Financial Reporting and Analytics Data Model. This capability is available only to OfficeConnect for Financial Management. See [Show Details for Report Cells](#).

Business Benefits

When drilling using Show Details in OfficeConnect reports, end users can use Journal Number for reconciliation purposes.

Changes

We now add a new Journal Number field for Show Details in the Financial Reporting and Analytics Data Model.

View By Dimension for OfficeConnect for Financial Management

We now enable you to further explore a selected report cell in a new worksheet within the context of the model. You can manipulate the data in the new worksheet and generate new reports without disrupting the existing report.

Watch the video: 2m 43s

View Cell Data in New Worksheet

Release: 2024-03-09

Report users can now select an existing report cell to view the data in a new worksheet as a new report. Using the dimensions available to the report cell, they can select the:

- Rows and columns for the new report.
- Element hierarchy level to which they want to expand the data.

OfficeConnect adds the remaining elements from the cell as filters to the new report.

See:

- [What's New Post: View By Dimension for OfficeConnect for Financial Management](#)
- [View Cell Data in New Worksheets](#)

Alternate Ledger Currency Support in OfficeConnect for Financial Management

With this release, report creators in OfficeConnect for Financial Management can use either alternate or primary ledger currency on reports. This enables financial analysts to have flexibility in supporting local statutory reporting.

Watch the video: 3m 40s

Alternate Ledger Currency in OfficeConnect

Release: 2024-03-09

We now support alternate ledger currency through ledger currency mapping in Workday. This allows report users to:

- Directly report on alternate and primary ledger currencies in OfficeConnect.
- Drill into the different sets of journal lines for different ledgers and ledger currencies.

See:

- [What's New Post: Alternate Ledger Currency Support in OfficeConnect for Financial Management](#)
- [Report Using Alternate Ledger Currencies](#)

Data Model Enhancements for OfficeConnect

We now update the Financial Reporting and Analytics Data Model to enhance your reporting experience.

Clear Cache on Model Save

Release: 2024-03-09

Whenever administrators make changes to the Setup Financial Reporting and Analytics Data Model task, we now reflect these changes in the OfficeConnect client automatically.

This update applies to only OfficeConnect for Financial Management.

See [Concept: Caching and Refreshing the Financial Modeled Data Source](#).

Loan Worktag

Release: 2024-04-12

For OfficeConnect for Financial Management, we now enable you to configure the Loan Accounting Worktag as a dimension in the Financial Reporting and Analytics Data Model. End users can then report on this dimension.

Multi-Select Settings for Reports and Dashboards

With this release, we continue to improve the functionality and usability of multi-select settings for reports and dashboards.

Multi-Select Options in Dashboards

Release: 2024-03-09

We continue to improve the usability of multi-select in dashboards. We now provide:

- A toggle to allow multi-select in the Appearance Settings of a perspective.
- The ability to apply or cancel new selections made to a list.

See [Enable Multi-Select for a Perspective](#).

Multi-Select Options in Reports

Release: 2024-03-09

We continue to improve the usability of multi-select parameters in the matrix report viewer. We now provide the ability to apply or cancel new selections you make from the parameter options.

See [Enable Multi-Select for Report Parameters](#).

Adaptive Planning Permissions

We deliver new permissions to provide you with greater flexibility and control over user access.

Edit Company Dashboards

Release: 2024-04-12

We add a new Edit Company Dashboards permission that enables users without additional admin or modeling permissions to create calculated metrics and to change drill options for accounts.

Note:

Users with the Admin Access or the Model includes: Sheets, accounts, dimensions, and formulas permission can already create calculated metrics and change drill options.

Chart Improvements in Dashboards

With this release, we continue to add more ways to format and view data in charts.

Chart Details

Release: 2024-03-09

We improve the functionality of chart details, improving chart appearance and helping you analyze data. We now provide:

- The ability to resize chart legends.
- The ability to resize and move chart data labels.
- The ability toggle on and off individual data series that display in a chart.

Text on Dashboards

Release: 2024-03-09

We add more formatting options to text on dashboards that improves how you can style text. We now provide:

- The ability to change font color.
- The ability to highlight text.
- The ability to strikethrough text.
- The ability to clear formatting.
- More font size choices.
- Linked text formatted with an underline.

Note: The Body 1 font style is now a larger font.

See [Add Text to Dashboards](#).

Fan Chart on Dashboards

With this release, we now enable you to use fan charts in dashboards, giving you more ways to visualize your data.

Fan Chart

Release: 2024-03-09

You can now add fan charts to your dashboards to visualize variances for forecast versions and compare with your actuals. The fan chart is now in the list of available charts in edit mode.

See:

- [Enable Multi-Select for a Perspective](#).
- [Reference: Fan Chart Settings](#).

Adaptive Planning APIs

We deliver new and updated APIs, enabling you to create applications and integrations based on Adaptive Planning users, user groups, and account groups.

Manage External User Groups in Adaptive Planning

Release: 2024-03-09

After importing external user groups through the `importGroups` API, you can now edit them in the Adaptive Planning user interface. You can only edit the user groups with `dataSource` set to `EXTERNAL`.

Admins can enable the editing of the external user groups in Adaptive Planning by selecting an option in the General Setup page.

See [importGroups](#).

API to Export User Groups and Group Members

Release: 2024-03-09

You can now export both user groups and group members from Adaptive Planning using an API.

See [Groups](#).

`createUser`, `updateUser`, and `exportUser` APIs

Release: 2024-03-09

We now add attributes such as Homepage, Perspective, Dashboard, and so on to the user APIs to make them consistent with each other and the Adaptive Planning user interface.

See:

- [createUser](#)
- [updateUser](#)
- [exportUsers](#)

API for Deleting Users

Release: 2024-03-09

You can now use an API for deleting users from Adaptive Planning.

See [Users](#)

JSON Formatted REST API Endpoints in Adaptive Planning

We deliver new JSON formatted REST API endpoints enabling you to create applications and integrations based on Adaptive Planning cube sheets, accounts, dimensions, dimension values, attributes, attribute values, and levels.

Cube Sheet Definition API

Release: 2024-03-09

If you want to define a cube sheet in Adaptive Planning, you can now use the cube sheet JSON formatted REST API endpoint. This API supports:

- PATCH
- DELETE

See [Cube Sheet Definition](#).

API for Deleting a Column from Modeled and Cube Sheet Definitions

Release: 2024-03-09

We now provide a JSON formatted REST API endpoint for deleting a column from modeled and cube sheet definitions. This API supports:

- POST

See [Cube Sheet Definition](#) and [Modeled Sheet Definition](#).

API for Deleting Accounts

Release: 2024-03-09

We now provide a JSON formatted REST API endpoint for deleting accounts. This API supports:

- POST

See [Accounts](#).

API for Deleting Attributes

Release: 2024-03-09

We now provide a JSON formatted REST API endpoint for deleting attributes. This API supports:

- POST

See [Attribute](#).

API for Deleting Attribute Values

Release: 2024-03-09

We now provide a JSON formatted REST API endpoint for deleting attribute values. This API supports:

- POST

See [Attribute Values](#).

API for Deleting Levels

Release: 2024-03-09

We now provide a JSON formatted REST API endpoint for deleting levels. This API supports:

- POST

See [Levels](#).

API for Deleting Dimensions

Release: 2024-03-09

We now provide a JSON formatted REST API endpoint for deleting dimensions. This API supports:

- POST

See [Dimension](#).

API for Deleting Dimension Values

Release: 2024-03-09

We now provide a JSON formatted REST API endpoint for deleting dimension values. This API supports:

- POST

See [Dimension Values](#).

exportData API Performance

We now support a new streaming version of the exportData API for better scalability. To use the new streaming capability, you must upgrade to API version 38 and beyond.

Also, scalability is improved when you publish plans from Workday or retrieve account data from the Adaptive Planning data source.

Supported API Elements and Attributes

Release: 2024-03-09

For the exportData API version 36 and beyond, we now support all elements and attributes for the optimized path for performance and scalability.

See:

- [exportData](#)
- [Reference: exportData Performance](#)

Supported Accounts

Release: 2024-03-09

We now support accounts with weighted average rollup for the API version 36 and beyond for the optimized path for performance and scalability.

See:

- [exportData](#)
- [Reference: exportData Performance Conditions](#)

Azul Zulu JDK in the Adaptive Planning Data Agent

With this release, we replace the Oracle JDK in the Adaptive Planning Data Agent with the Azul Zulu JDK.

Support for Azul Zulu JDK 8

Release: 2024-03-09

With this release, we support Azul Zulu JDK 8 for Pentaho Data Integration (Kettle 8.3).

See [Install the Workday Adaptive Planning Data Agent Manager](#).

Adaptive Planning -- Miscellaneous Enhancements

New Currency for the Caribbean Guilder

Release: 2024-03-09

With the 2024R1 Release, we add a new currency in the Currencies area of Modeling. The new currency is the Caribbean Guilder with currency code XCG.

Show Details in OfficeConnect for Financial Management

To provide additional context for your financial reporting and reconciliation, we now support line memo and plan lines for Show Details.

View Line Memos in Show Details

Release: 2024-03-09

You can now configure line memo, memo, and external reference ID for Show Details in the Financial Reporting and Analytics data model. This enables end users to:

- Do ad-hoc analysis to investigate fluctuations or abnormalities.
- Categorize certain sub types of activities for reconciliation.
- Isolate payments to suppliers by contract.
- View quick notes to differentiate the transaction types.

See [Show Details for Report Cells](#).

Show Details for Plan Lines

Release: 2024-03-09

We now support Show Details for plan lines. End users can then use the Show Details option for both Actuals and Plans. Previously, we supported Show Details only for actuals.

See [Show Details for Report Cells](#).

Dimension Rollups Include Values for Dimensions Outside the Hierarchy

Dimension rollups now include the dimension values accessible to users that exist within the company hierarchy but reside outside the dimension hierarchy configured in the model.

This functionality is only available to OfficeConnect for Financial Management.

Changes

End users can see the values for dimensions that are outside the hierarchy when:

- They apply the dimension rollup such as a cost center directly to an OfficeConnect report.
- Select **Show Details** from a report cell where they applied the dimension rollup.

Exclude from Spend as a Dimension

For OfficeConnect for Financial Management, administrators can now configure a new Exclude from Spend Report dimension.

Business Benefits

The new dimension enables users to accurately reflect expenses for budget checking and spend management reporting.

Changes

In the Financial Reporting and Analytics Data Model, administrators can now configure the Exclude from Spend Report field as a dimension.

In OfficeConnect, end users can:

- View the dimension in the Elements pane with the values of Yes and No.
- Apply the element as a filter to their reports.

Administrators can specify a default value in the reporting model. Else, all journal lines are included.

2023R2 Release Notes

2023R2 Service Pack Release Notes

Release: 2024-01-26

[OfficeConnect API Client Migration](#)

Release: 2023-12-15

[OfficeConnect - Miscellaneous Enhancements](#)

Release: 2023-12-08

Modeled Sheet Data Validations

Adaptive Planning Notifications

Release: 2023-11-10

Bottom-Up Workforce Planning

Release: 2023-10-13

Replace Mode for Standard Data Import in Planning Data Loaders

Adaptive Planning User Experience

We continue to align the Workday Adaptive Planning interface with Workday to provide a more consistent user experience.

Maximum Number of Levels in Snapshots

Release: 2023-09-09

We now disable the **Include all levels** option and display a message when you create report snapshots that exceed the maximum number of levels allowed.

You can create a snapshot with the **Include all levels** option for a maximum of 6,000 levels.

See [Create Report Snapshots](#).

Integration Task Overview

Release: 2023-09-09

With this release, we improve the user experience of the Integration Task Overview, aligning it with Workday user interface and accessibility standards. We now provide:

- A new navigation section, enabling you to quickly access the most recently run or failed tasks.
- An **Actions** button you can click to navigate to important updates or Integrations related information.
- Live task status updates on the task overview page and task details page.

Note: To disable the new integration task overview user interface, you must deselect the Use the Integration Overview check box on the Visual Preferences page in Administration.

See [View and Run Tasks](#), [Change Visual Preferences](#).

Additional Attributes in Export User List

Release: 2023-09-09

We now add these attributes to the Users spreadsheet file when you export the users list from the Users page under Administration:

- Home Page
- Perspective
- Dashboard

Adaptive Planning Notifications

With 2023R2, we introduce Adaptive Planning notifications, giving you relevant alerts to view and manage.

Notifications Page

Release: 2023-12-08

We deliver a new Notifications page to view and manage your Adaptive Planning notifications. You can mark notifications as read and move notifications between the Inbox and Archive folders.

Access the Notifications page from the Notifications icon on the top of any page.

For this release, we only deliver Integration notifications. Integration notifications make it easier for Integration users to:

- Maintain configurations
- Learn about feature enhancements
- Troubleshoot issues

Note: Integration notifications only display for users with the Data Designer permission. To disable the notifications user interface, you must deselect the Enable notifications check box on the Visual Preferences page in Administration.

See [View Adaptive Planning Notifications](#).

Access Rules Retain Grant All Except Rules

To increase the efficiency of maintaining access rules, we improve the behavior and the display of the Grant All Except capability. For your convenience, we now maintain your rules exactly how you imported them, displaying the values you entered for Grant All Except in new columns for each secured dimension.

To improve efficiency, we also retain the Grant All Except values when you export the rules for maintenance. Retaining the Grant All Except values dynamically updates user access when you add more values to secured dimensions.

Watch the video: 1m 3

New Grant All Except Functionality for Access Rules List

Release: 2023-09-09

With the 2023R2 Release, we now retain the values in the new Grant All Except columns. Now, access rules look exactly how you created them, which enables you to review and maintain them with more efficiency in the:

- Access rule list of the application when you go to Administration > Access Rules.
- Access Rules Template spreadsheet when you export your access rules.

See:

- [What's New Post: Access Rules Retain Grant All Except Rules](#).
- [Concept: Access Rules Quick Tour](#).

Improved Logic for Grant All Except Access Rules

Release: 2023-09-09

For a more intuitive experience, we enable access rules defined by Grant All Except columns to update logically. When you:

- Add new values to secured dimensions, we now automatically grant those values. Example: A rule has the Engineering level listed in the Grant All Except column. When you add QA to the level structure, we automatically grant access to QA.
- Reparent values to secured dimensions, we automatically restrict access to values that are reparented to levels listed in Grant All Except Column. Example: The rule lists Engineering in the Grant All Except column. The rule, therefore grants access to QA. When you make Engineering the parent of QA, the rule no longer grants access to QA.

See:

- [Concept: Access Rules](#).

- [Create Access Rules.](#)
- [What's New Post: Access Rules Retain Grant All Except Rules.](#)

New Method of Removing Secured Dimensions

Release: 2023-09-09

We now provide another way for you to remove secured dimensions. We changed the Add button in the toolbar to Manage, which now enables you to remove dimensions from the list in the dialog box as well as add dimensions. We also change the button in the dialog box from Add to Done.

See [Create Access Rules.](#)

Hide Blank Columns on the Access Rules Page

Release: 2023-09-09

Now that every secured dimension has both a Grant and Grant All Except column, we now enable you to simplify your view by hiding blank columns. We provide a new check box, Suppress Columns with No Values, to the dialog that opens when you click Manage from the toolbar.

See [Concept: Access Rules Quick Tour.](#)

Version Queuing

With the 2023R2 Release, we provide a new version queuing process for a more intuitive experience when you create versions, especially large versions that require a lot of time to create. With the new version queuing process, we prevent timeout errors and create the version in the background so that you don't have to wait.

We also provide messaging and statuses to guide you through the version queuing process. Statuses include: In Progress, Complete, and Failed.

Watch the video: 2m 6s

New Version Status Display

Release: 2023-09-09

We now provide a status of new versions in the version list, which is visible to all users. We enable you to navigate away from the Version area of Modeling while your new version queues. You can then return anytime to check the status. The status displays next to the name of the new or queuing version in the version list:

- In Progress: The new version is queuing.
- Complete: The new version is done. We also add a new Refresh button that displays when the version completes and you haven't left the Version area of Modeling.
- Failed: When new versions fail, we provide an info icon that enables you to review a list of errors that you can correct before trying again.

While a version that you created queues, we enable other users to create new versions. However, we don't allow you to create a new version until the queuing version has finished processing.

See:

- [Create Plan Versions.](#)
- [Create Actuals Versions.](#)
- [What's New Post: Version Queuing.](#)

Modeled Sheet Data Validations

You can now configure data validation rules for user-entered data on modeled sheet cells, making it easier for you to ensure data accuracy and data consistency.

Watch the video: 4m 43s

Data Validations Opt-In Check Boxes

Release: 2023-12-08

We add a new Data validations in Sheets check box on the Visual Preferences page of Administration, enabling you to:

- Create data validation rules for modeled sheets in Model Management.
- Use data validations on modeled sheets.

We also add a new Data validations in Import Data (requires Data validations in Sheets) check box, enabling you to enforce or skip data validations when you use the Import Data page in Integration.

See [Change Visual Preferences](#).

Data Validation Rules in Model Management

Release: 2023-12-08

When you edit a sheet on these Model Management pages, we add a new Data Validation Rules page:

- Level Assigned Sheets
- User Assigned Sheets

We only display the new page for modeled sheets that weren't created by a planning configuration manager.

You can now create data validation rules for each sheet. For each rule, you can configure:

- The active or inactive status of the rule.
- The validation expression manually or using an expression builder.
- The validation help text to display to your sheets users when they enter invalid data.
- Whether the rule rejects invalid data or allows invalid data with a warning.

See [Set Up Modeled Sheet Data Validation Rules](#).

Data Validations on Modeled Sheets

Release: 2023-12-08

When you enter data on modeled sheets that violate an active data validation rule, we now display your configured validation help text and either an:

- Orange border around the row in error for soft errors. You can still save the sheet while this invalid data exists.
- Red border around the row in error for critical errors. You can't save the sheet while this invalid data exists.

See [Reference: Colors and Notations in Sheets](#).

Data Validations in Modeled Sheet Data Import API

Release: 2023-12-08

When you import modeled sheet data with the `importConfigurableModelData` API, we provide a new `importDataOptions` element with a Boolean `applyValidationRules` attribute. Setting this attribute to true performs modeled sheet rule validation on your import.

Note: The `importDataOptions` element and `applyValidationRules` attribute are only available in API v37 and above.

See [importConfigurableModelData](#).

Bottom-Up Workforce Planning

When you perform bottom-up, position-level workforce planning, you can now plan for future-dated changes to existing filled or unfilled positions. You retain the prior position information as you plan. This helps ensure the accuracy of calculations of those prior position information. We also display compensation guidelines when you plan new positions to make it easier to enter compensation basis amounts that follow your organization's compensation eligibility rules.

Note: To use this feature, we require you to configure the workforce planning configuration manager feature with the Use Plan and Execute Tasks option selected.

Watch the video: 3m 59s

Effective Date Settings for Position Edits

Release: 2024-03-09

When you create or edit 1 or multiple positions on your headcount plan, we add a new:

- Effective As Of prompt.
- Apply these changes to existing future-dated edits for these positions check box.

This new prompt and new check box enable you to:

- Apply changes that you make on this form to existing future-dated edits for the selected positions.
- Retain the prior states of those existing filled and unfilled positions to help ensure accuracy in calculations.

You can access the new prompt and check box when you create or edit positions on your headcount plan using these Inbox items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

See [Complete Headcount Planning Participant Detail Events](#).

Effective Dated Changes Icon and Popup

Release: 2024-03-09

We add a new Effective Dated Changes popup that you can access from a new calendar icon on each row, enabling you to:

- Edit changes to the position for that effective date.
- Delete changes to the position for that effective date.
- Duplicate changes to the position for that effective date in a new effective date.

We only display the new icon on a row when at least 1 effective-dated change exists for the position in your selected period.

You can access the new popup and icon when you create or edit positions on your headcount plan using these Inbox items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

See [Complete Headcount Planning Participant Detail Events](#).

Effective As Of Prompt on Grid

Release: 2024-03-09

We add a new Effective As Of prompt above the rows grid, enabling you to filter grid rows.

You can access the new prompt when you create or edit positions on your headcount plan using these Inbox items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

See [Complete Headcount Planning Participant Detail Events](#).

Effective Start Date and Effective End Date Columns on Roster Sheets

Release: 2024-03-09

For roster sheets created from workforce planning configuration managers that you use for planning and executing using tasks, we now add these new read-only, required columns:

- Effective Start Date
- Effective End Date

We only display the new columns on the Adaptive Planning roster sheet that's automatically synced with your headcount plan.

We automatically:

- Add these columns to roster sheets from workforce planning configuration managers that were created before Workday 2023R2.
- Use these new columns in your headcount plans for effective-dated changes and filtering.

Compensation Basis Amount Guidelines

Release: 2024-03-09

When you create or edit positions on your headcount plan, we run your compensation eligibility rules and now display a new Compensation Guidelines section with these read-only fields:

- Base Pay Range
- Compensation Pay Range Midpoint
- Compensation Package
- Compensation Grade

You can access the new section when you create or edit positions on your headcount plan using these Inbox items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

See [Complete Headcount Planning Participant Detail Events](#).

Compensation Currency and Staffing Status Columns on Roster Sheets

Release: 2024-03-09

We add these new dimensions and roster sheet columns on the Manage Workforce Planning Configuration task:

- Compensation Currency
- Staffing Status

We now require you to add these dimensions to workforce planning configuration managers that you use for planning and executing using tasks.

We also add these new columns:

- As required columns on headcount plans created using these workforce planning configuration managers.
- Automatically to headcount plans from workforce planning configuration managers that were created before Workday 2023R2.

See [Manage Workforce Planning Configurations](#).

Save Changes to Positions

Release: 2024-03-09

We remove the Save button from your headcount plan that you can access using these Inbox items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

Instead, we automatically save when you:

- Change data.
- Delete data.
- Enter data.
- Submit.

We continue to update the KPIs when you save.

See [Complete Headcount Planning Participant Detail Events](#).

Read-Only Headcount Plan Upon Submission

Release: 2024-03-09

To maintain plan integrity, we now make the headcount plan read-only to plan participants when:

- All plan participants submitted or the plan controller pulled the entire plan forward.
- The controller pulls forward the individual business process event of the participant.
- The controller closes the individual business process event that exists for the participant.
- The participant submits their part of the headcount plan.

We make the headcount plan that you can access using these Inbox items read-only:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

When the headcount plan is read-only, we disable these actions:

- Add or edit positions.
- Select rows.

You can continue to:

- Apply filters.
- Select Level and Period.

See [Complete Headcount Planning Participant Detail Events](#).

Row Count

Release: 2024-03-09

We now display the total number of headcount plan rows and how many of those rows we display based on these filters:

- Supervisory Organization
- Effective As Of Date
- Display Options

We display row numbers for headcount plan rows that you can access using these Inbox items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

See [Complete Headcount Planning Participant Detail Events](#).

Loading Spinner

Release: 2024-03-09

To help prevent errors when you change the headcount plan, we now display a loading spinner on the headcount plan that you can access using these Inbox items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

We display the new loading spinner when you:

- Add a new row.
- Delete an effective date for a row.

This loading spinner restricts you from taking any actions while we persist your change and refresh the KPIs.

See [Complete Headcount Planning Participant Detail Events](#).

Grid Sorting in Ascending and Descending Order

Release: 2024-03-09

We now enable you to use the column headers on the rows grid of your headcount plan to sort your rows in either ascending or descending order.

You can sort on headcount plan rows that you can access using these Inbox items:

- Headcount Planning Event
- Headcount Planning Participant Detail Event

See [Complete Headcount Planning Participant Detail Events](#).

Display Compensation Guidelines in Forms Check Box

Release: 2024-03-09

We add a new Display Compensation Guidelines in Forms check box on these tasks:

- Create Headcount Plan
- Create Headcount Forecast Plan

You can use this new check box to display or hide the Compensation Guidelines fields when you use the Headcount Planning Participant Detail Event Inbox item to:

- Create positions on your headcount or headcount forecast plan.
- Edit positions on your headcount or headcount forecast plan.

See [Complete Headcount Planning Participant Detail Events](#).

Execute New Planned Positions

You can now create positions directly from approved headcount plans, reducing the manual labor of putting your plan into action. When you use Change Organization Assignment as a sub-business process of Create Position, we automatically provide the planned organization information. The position level connection between your plan and actuals also makes headcount reconciliation easier.

Note: To use this feature, we require you to configure the workforce planning configuration manager feature with the Use Plan and Execute Tasks option selected, and have used the Bottom-Up Workforce Planning feature for your headcount plan.

Watch the video: 3m 18s

Manage Workforce Planning Configuration Task

Release: 2024-03-09

When you create a new planning application on the Manage Workforce Planning Configuration task, we now display these new options:

- Use Plan and Execute Tasks
- Plan in Adaptive Planning

To use the Bottom-Up Workforce Planning features, we now require you to select Use Plan and Execute Tasks when you create new headcount planning applications.

See [Manage Workforce Planning Configurations](#).

Map Plan Fields to Task Fields

Release: 2024-03-09

We add a new Map Plan Fields to Task Fields page on the Manage Workforce Planning Configuration task, enabling you to map planning dimensions to fields on these position tasks:

- Create Position
- Change Organization

We automatically provide this information using your mapping setup to the Create Position business process when you execute positions on the Execute Headcount Plan task.

See [Manage Workforce Planning Configurations](#).

Execute Headcount Plan Task

Release: 2024-03-09

We deliver a new Execute Headcount Plan task (secured to the Process: Headcount Planning domain) that you can use with approved headcount plans generated using a planning configuration manager to:

- Change organization assignments as a sub-business process of your Create Position business process.
- Create positions using the Create Position business process.
- Link unplanned positions to To Be Hired positions on this headcount plan so that you can track those positions like the planned positions. We include these originally unplanned positions with the planned positions in headcount reconciliation.
- Track which positions on the headcount plan have initiated, in progress, completed, or canceled business process events.

See [Execute Headcount Plans](#).

To Be Hired ID Report Field

Release: 2024-03-09

We deliver a new To Be Hired ID report field on the Plan Executable business object (secured to the Public Reporting Items domain) that you can use in condition rules and custom reports to view the To Be Hired ID of newly planned positions on headcount planning rows.

We automatically use this report field for headcount planning rows on the roster sheets that are synced with your headcount plans.

View Headcount Plan Report from Related Actions Menu

Release: 2024-03-09

We deliver a new View Headcount Plan report (secured to the Process: Headcount Planning domain), which you can access from the related actions menu of headcount plans on the View Headcount Planning Configuration report. This new report enables you to easily view information about your headcount plans from their related actions menus instead of directly on the headcount plans.

Headcount Forecast Planning

With this release, you can create a forecast plan based on your latest actuals and selected events from your prior plan, making it easier to course correct using relevant data as you begin to adjust your current plan or to start your new planning cycle. Once you create your forecast plan, you can initiate a new headcount planning process.

Note: To use this feature, we require you to configure the workforce planning configuration manager feature with the Use Plan and Execute Tasks option selected, and have used the Bottom-Up Workforce Planning feature for your headcount plan.

Watch the video: 3m 45s

Create Forecast Task

Release: 2024-03-09

We deliver a new Create Forecast task (secured to the Headcount Planning business process) that you can use to create a headcount forecast plan based on:

- An approved headcount plan as the source plan.
- The latest actuals.

We merge the To Be Hired and existing position edits from the source plan with the latest actuals. You can also include unexecuted To Be Hired positions from the approved source plan with effective dates in the past.

We automatically configure the new task as an initiating action on the Headcount Planning business process.

When you complete the new task, you generate these Inbox items that plan controllers and participants can now use for forecast headcount planning:

- Headcount Planning Event
- Headcount Planning Participant Detail Event
- [Create Headcount Forecast Plans](#).

Approved Headcount Forecast Plans and Source Headcount Plans

Release: 2024-03-09

When you finish forecast planning and approve the headcount forecast plan, we now restrict you from executing on positions from the source headcount plan when you either:

- Approve the forecast plan.
- Create the forecast plan and select the Lock Source Plan Executions check box on the Create Forecast task.

See [Execute Headcount Plans](#).

Planning Configuration Manager

You can now update your activated planning configuration managers without requiring you to unregister your application, complete manual clean-up, reregister, update your planning configuration manager, and activate your planning configuration manager again. This makes it faster and easier to iterate on your planning configuration manager definition during implementation and maintain your planning configuration manager after you go live.

Levels and Dimensions Pages

Release: 2023-09-09

When you edit activated applications on the Levels and Dimensions pages of the Manage Workforce Planning Configuration task, we now enable you to:

- Add attributes to existing levels and dimensions.
- Add custom dimensions.

We also enable you to make these changes to your filters:

- Change the top level hierarchy.
- Add or remove Included values.
- Add or remove Excluded values.
- Add, change, or remove Advanced Filter values.

See:

- [Manage Workforce Planning Configurations](#).
- [Concept: Workforce Planning Configuration](#).

Roster Sheet Page

Release: 2023-09-09

On the Roster Sheet page of the Manage Workforce Planning Configuration task, we enable you to make these changes to your filters:

- Add or remove conditions.
- Change and/or operators.
- Change open and close groupings.
- Change the comparison type.
- Change the comparison value.
- Change the field.
- Change the operator.

See:

- [Manage Workforce Planning Configurations](#).
- [Concept: Workforce Planning Configuration](#).

Select Instance & Activate Page

Release: 2023-09-09

When you change activated applications on the Manage Workforce Planning Configuration task, we replace the Select Instance & Activate page with a Review Changes and Activate page. We display all of your changes on this page. You can now either discard all changes or activate changes on the application.

See:

- [Manage Workforce Planning Configurations](#).
- [Concept: Workforce Planning Configuration](#).

View Planning Applications Report

Release: 2023-09-09

We deliver a new View Planning Applications report (secured to the Set Up: Headcount Planning domain), enabling you to easily view:

- Planning applications that are created from planning configuration managers.
- Adaptive Planning instances the planning applications are mapped to.
- Status of the planning application and when the status was last updated.

See [Concept: Workforce Planning Configuration](#).

API Restrictions

Release: 2023-09-09

When you use the Planning Configuration Manager, requests to these APIs error out to prevent changes that would disrupt your configuration:

- updateAccounts
- updateDimensions
- updateAttributeValues
- updateLevels
- Versions
- Modeled Sheet Definition
- Time
- ExchangeRateType
- Currency

We also restrict attempts to make changes to these fields through API requests:

- updateLevel
 - level name
- updateAccount
 - account code
 - account name
- updateDimension
 - dimension short name
 - dimension name
- updateDimensionValue
 - dimension value name

See:

- [Manage Workforce Planning Configurations.](#)
- [Concept: Workforce Planning Configuration.](#)

Security Page

Release: 2023-09-09

We add a new API Client Scope Allows Access column to the Security page of the Manage Workforce Planning Configuration task.

To help prevent downstream errors, we now restrict you from progressing past the Security page or activating a planning configuration manager application until you:

- Give your Integration System User (ISU) access to all data sources and report fields on the planning configuration manager.
- Select the functional areas for all data sources and report fields on the planning configuration manager on your API Client Scope.

See:

- [Manage Workforce Planning Configurations.](#)
- [Concept: Workforce Planning Configuration.](#)

Review Changes to Map Plan Fields to Task Fields Page

Release: 2023-09-29

When you make any changes on the Map Plan Fields to Task Fields page for activated applications on the Manage Workforce Planning Configuration task, we now include the changes on the Review Changes and Activate page. You can now either discard or activate these changes on the application.

See:

- [Manage Workforce Planning Configurations.](#)
- [Concept: Workforce Planning Configuration.](#)

Publish Headcount Plan Cost of Workforce

You can now include cost of workforce data when you publish headcount plans, enabling you to use real-time information on your reports about how your organization is doing compared to what you originally planned for.

Cost Of Workforce Field on Workday External System

Release: 2023-09-09

We add a new Cost Of Workforce field on your Workday external system, enabling you to select a cost of workforce account to use for headcount plan publishing.

See [Set Up Workday External Systems for Adaptive Planning.](#)

Publish Cost of Workforce Account Values with Headcount Plans

Release: 2023-09-09

When you publish your headcount plans, we now enable you to include Cost of Workforce account values.

See [Publish Headcount Plans from Adaptive Planning.](#)

Plan Publishing Performance and User Experience Enhancements

With this release, we continue to improve the financial plan publishing experience. We enhance the publishing page to expose more status and error messages, enabling you to view publishing progress and cancel publishing. We deliver a smaller publishing payload and improve import processing speed.

Note: You must contact your Named Support Contact to enable this feature.

Publish Progress Status Bar

Release: 2023-09-09

With this release, we provide a status bar indicating percent complete for in-progress publishing.

See [Publish Financial Plans from Adaptive Planning.](#)

Cancel Publish

Release: 2023-09-09

We enable a Cancel button, so that you can stop an in-progress publish. When you cancel a publish, none of its data publishes to Workday Financials.

See [Publish Financial Plans from Adaptive Planning.](#)

Actuals Import from Workday Financials

With this release, you can import larger volumes of Journal Lines data from Workday Financials into Workday Adaptive Planning in a more seamless and performant way. This reduces implementation time and enables an easier setup.

Watch the video: 2m 58s

Manage Journal Line Summaries User Interface

Release: 2023-09-09

We provide a new Manage Journal Line Summaries interface in the Actions pane of Workday data sources in Adaptive Planning Design Integrations. When you click the link, you can:

- Create integration systems and select optional fields to import from the Workday journal line summaries.
- Organize integration systems into containers.
- Delete integration systems and containers.

Manage Journal Line summaries is secured to the Integration Build domain.

See [Manage Journal Line Summaries for Import](#).

Output Fields for Journal Line Summaries

Release: 2023-09-09

When you create an integration system to import journal line summaries, these required fields automatically populate from Workday Financials:

- Company
- Fiscal Period
- Ledger Account
- Ledger/Budget Amount for Natural Debit or Credit
- Ledger Debit Minus Credit

You can also select optional output fields.

See [Manage Journal Line Summaries for Import](#).

Parameters for Journal Line Summaries

Release: 2023-09-09

You can select parameters to filter the data that imports from the journal line summaries. You must select prompts for these required parameters:

- Company
- Ledger
- Period Start Date
- Period End Date

You can select prompts for these optional parameters:

- Book
- Report Effective Date
- Ledger Accounts and Summary Accounts
- Additional Options

See [Manage Journal Line Summaries for Import](#).

Retained Earnings and Ending Balance

Release: 2024-05-10

With this release, you can import larger volumes of Journal Lines data from Workday Financials into Workday Adaptive Planning in a more seamless and performant way. This reduces implementation time and enables an easier setup.

exportData API Performance

With this release, we improve the performance of the exportData API. To benefit from this performance optimization, you must upgrade to the API v36 and beyond. Also, performance is improved when you publish plans from Workday or retrieve account data from the Adaptive Planning data source.

Supported Accounts

Release: 2023-09-09

We support all matrix report account types for improved performance and scalability, except these:

- System accounts (includes allocations, minority interest %, eliminations, cumulative translation adjustment)
- Model sheet assumption accounts

Supported Features

Release: 2023-09-09

We support all modeling features for improved performance and scalability, except these:

- Spread Lookups
- Value Lookups
- Text rollups
- Weighted average rollup
- Weighted Average Translation

Supported API Elements and Attributes

Release: 2023-09-09

We support all exportData API elements and attributes for improved performance and scalability, except these:

- format:
 - useInternalCodes=FALSE
 - includeUnmappedItems=TRUE
- rules:
 - includeRollupLevels=TRUE
 - includeRollupAccounts=TRUE
 - includeZeroRows=TRUE
 - timeRollups=SINGLE
- account:
 - isAssumption=TRUE
- level:
 - isRollup=TRUE
- dimensionValues

For users with limited data access, only requests with secured dimensions specified in the API enjoy improved performance.

See [Reference: exportData Performance](#).

Average Daily Balance Support in OfficeConnect for Financial Management

With this release, report creators in OfficeConnect for Financial Management can report on the average daily balance for any given account over different time spans, enabling banking customers to assess data like interest required against the respective balance averages.

Watch the video: 4m 43s

Reporting on Average Daily Balance

Release: 2023-09-09

Report creators can now report on Average Daily Balance (ADB), a standard measure for banking customers.

ADB:

- Provides a true picture of account balances over a period of time.
- Meets regulatory requirements.

Once you log in to OfficeConnect, the Elements tab automatically shows Average Daily Balance as a new value for the Amount Types dimension. No administrative steps are required to set up and use Average Daily Balance.

See:

- [What's New Post: Average Daily Balance Support in OfficeConnect for Financial Management](#)
- [Average Daily Balance Reporting with OfficeConnect](#)
- [The Next Level: All Things 2023R2 for Adaptive Planning, Reporting, and Prism Analytics](#)

Time Options for OfficeConnect for Financial Management

We now enable OfficeConnect for Financial Management users to add time context and time components to reports. The extra time elements provide flexibility to users when defining time in a report. Also, they can generate "to date" reports and create unique date intersections.

Watch the video: 2m 32s

Time Context

Release: 2023-09-09

We now enable you to apply these time contexts to time elements in your reports:

- Period to Date (PTD)
- Quarter to Date (QTD)
- Year to Date (YTD)

Use time contexts primarily with the Activity or Average Daily Balance amount types.

Example: To see quarter to date revenue, apply QTD and a specific time element on revenue activity.

Your time contexts depend on these configurations in the data model:

- Fiscal year
- Summary schedule
- Posting interval period

Example: If your summary period is Half Year instead of Quarter, you see Half Year to Date.

Note: You must download and install the latest available OfficeConnect client for 2023R2.

See:

- [Add Time Contexts](#)
- [Concept: Time Context with Average Daily Balance.](#)
- [The Next Level: All Things 2023R2 for Adaptive Planning, Reporting, and Prism Analytics](#)

Time Context Label

Release: 2023-09-09

We now provide a new Context label to enable you to add descriptive text about the time context you apply to your report.

Example: When you apply the Quarter to Date time context to the FY23 time element, to display a label like "FY23 – Quarter to Date", use these label types and their corresponding values:

- Time, Time Display Name
- Context, Context Display Name

See [Steps: Add Report Labels](#).

Time Components

Release: 2023-09-09

We now enable you to apply these time components to your reports:

- Years
- Quarters
- Months
- Days

Use the time components on different axes of the report for more flexibility such as:

- Months on columns and Years on rows.
- Quarters on rows and Years on columns.
- Months on columns and Relative Year on columns (based on the reporting date).

To display data, you must add a valid intersection of components. Example: If you apply only "June", OfficeConnect returns no data. You must apply "June" and "2023".

Your time components depend on these configurations in the data model:

- Fiscal year
- Summary schedule
- Posting interval period

Example: If your summary period is Half Year instead of Quarter, you will see Half Year.

Note: You must download and install the latest available OfficeConnect client for 2023R2.

See:

- [What's New Post: Time Options for OfficeConnect for Financial Management](#)
- [Add Component Date Elements](#).
- [The Next Level: All Things 2023R2 for Adaptive Planning, Reporting, and Prism Analytics](#)

OfficeConnect - Miscellaneous Enhancements

Refresh for Multiple Worksheets

Release: 2023-09-09

For OfficeConnect for Financial Management and Adaptive Planning, worksheets now update separately as they finish refreshing. You don't have to wait for all worksheets in an open workbook to finish refreshing before you can see them updated. The refresh steps for each sheet complete separately and the sheets update separately.

Note: You must download and install the latest available OfficeConnect client for 2023R2.

Display Unknown Elements in Filters

Release: 2023-09-09

For OfficeConnect for Financial Management and Adaptive Planning, we introduce a new workbook property: **Display unknown elements in worksheet and workbook filters**. When you select this option, users can see an unknown element that corresponds to an element that:

- They can't access.
- Doesn't exist in the hierarchy for a specific effective date

Example: A user creates a report filter on a specific date and you change the effective date to when the filter element doesn't exist. With the workbook property checked, you can now see the filter as an unknown element.

Note: You must download and install the latest available OfficeConnect client for 2023R2.

See [Add Elements to Report Filters](#).

Report on Prior Years Data

Release: 2023-12-15

For OfficeConnect for Financial Management, we now extend the ability to report on the 3rd prior year for 3 calendar months of the new fiscal year.

Example: When FY 2024 comes around, we enable you to report on:

- 2023
- 2022
- 2021 for 3 months. After the 3 months, 2021 is dropped.

Previously, you'd lose the 3rd prior year of data when the new fiscal year began.

OfficeConnect API Client Migration

With the upcoming retirement of the Implicit Grant API Client, OfficeConnect customers need to transition to the Proof Key for Code Exchange (PKCE) authentication method.

Watch the video: 2m 43s

Migrate API Client from Implicit Grant to PKCE Token Grant

Release: 2024-01-26

Workday plans to replace Implicit Grant authentication with PCKE Token Grant in 2024R1.

To prepare for this change, customers signing into OfficeConnect for Financial Management or Adaptive Planning from Workday, must:

- Download and install OfficeConnect version 2023.211.0923.3931 or later. The latest version becomes available for download after midnight PT or the day after the release date.
- Generate a new API client in the Tenant Setup report.
- Have end users sign in to OfficeConnect so the new client details can autopopulate the tenant connections.

If your IT team manages your OfficeConnect tenant connections, they must manually update these connections with the new API client details.

Note: We recommend that you complete these steps by May 9, 2024. After this date, you'll need to update the OfficeConnect tenant connections with the client details manually.

See [What's New Post: OfficeConnect API Client Migration](#)

Reports Performance

In this release, we continue to expand matrix report coverage for improved performance and scalability. We add support for additional accounts and features.

Supported Accounts

Release: 2023-09-09

We now support metric accounts in matrix reports for improved performance and scalability

See [Reference: Adaptive Planning Reports Performance](#).

Supported Features

Release: 2023-08-05

Note: This functionality is only available to the Adaptive Planning Limited Preview program at this time. We plan to deliver this to all customers in a future update.

We now support the Repeating Reports matrix report feature for improved performance and scalability.

See [Reference: Adaptive Planning Reports Performance](#).

Multi-Select Settings for Reports and Dashboards

We now enable you to select multiple parameter options in Reports and Dashboards. The resulting reports and dashboards display data for all selected parameter options. Selecting multiple parameter options at a time helps you analyze data more efficiently.

Allow Multi-Select in Report Parameter Settings

Release: 2023-09-09

For matrix reports, we now enable multi-select for parameters that connect to filters. When you create new parameters from filters, the **Allow multi-select** option is auto-selected. For parameters you previously connected to filters on existing reports, you can edit the report to change the parameter configuration to multi-select.

Multi-select allows report viewers to select multiple options from a single report parameter to see the summary data. Example: Level is a multi-select parameter in a budget report. Report users can view a summary of the operational expenses for all levels that they select.

The **Allow multi-select** option is unavailable for parameters that aren't connected to filters.

Note: You can't use Explore Cell in reports when multiple report parameter options are selected. To use Explore Cell, clear the **Allow multi-select** option for report parameters.

See:

- [Concept: Matrix Report Parameters](#).
- [Enable Multi-Select for Report Parameters](#)

Select Multiple Filters in Dashboards

Release: 2023-09-09

You can now select multiple levels and dimension values with perspective context filters in dashboards. You can click on selected items to remove selections, or use the new Selected tab to view and remove selections. Data in charts aggregate and filter based on the multiple selections. You can also select multiple values when you use Dimension for a breakdown.

Note: You can't Explore Data in charts when multiple dashboard filters are selected. To use Explore Data, use dashboard filters with single options.

Perspective Context Filters in Dashboards

With 2023R2, you can now hide the time and currency perspective filters for any dashboard, helping you customize dashboards to display relevant filters.

Hide Time and Currency Perspective Filters

Release: 2023-09-09

We deliver the Hide Time and Hide Currency filter options in Appearance Settings for any dashboard. This helps you display the relevant perspective context filters for each dashboard.

Sheets on Dashboards

With 2023R2, we continue to improve sheets on dashboards, enabling more flexibility with performance.

Optimize Sheets on Dashboards

Release: 2023-09-09

We improve the Optimize Sheet option for sheets on dashboards. The Optimize Sheet option enables you to use a new version of sheets on dashboards that improves load times. For cube sheets with Optimize Sheet enabled, you can now:

- Resize columns.
- Enter, edit, and delete values.
- Copy and paste actions.
- Save changes made to the sheet.

For cube and modeled sheets with Optimize Sheet enabled, you can also add, edit, and delete cell notes.

Replace Mode for Standard Data Import in Planning Data Loaders

With this release, we introduce a replace mode for standard data import within planning data loaders. This improves import performance by only replacing existing data in the levels, general ledger accounts, custom accounts, or assumption accounts you select.

Replace Import Mode Settings

Release: 2023-10-13

When you select a standard sheet in the Data Source Settings, you can now select Enable Replace Mode to load data into:

- All levels in the sheet or specific levels you select as level parameters.
- The general ledger accounts, custom accounts, or assumption accounts you select as account parameters.

Note: Enabling replace mode hides the Erase Settings tab.

See [Create Planning Data Loaders](#).

Single Column Data Import

We now enable the ability to import data without the requiring Code and Name columns. This improves the user experience by removing the need for complicated translations in column headers and text fields in modeled sheets.

Note: You must contact your Named Support Contact to enable this feature.

Company Setting

Release: 2023-09-09

When you turn on Enable Single Column Data Import and Export for Display Names, we hide the Import Without Code and Name columns for display names setting within Integration > Import.

See [Reference: General Setup](#).

Single Column Data Import in Design Integrations

Release: 2023-09-09

When you turn on Enable Single Column Data Import and Export for Display Names, the Name column mapping becomes optional for metadata loaders.

See [Concept: Loaders](#).

Export Name and Display Name for Attributes

Release: 2023-09-09

With this release, we support exporting the name and display names of attribute tags for:

- exportLevels
- exportDimensions

- [exportAccounts](#)

To export the name and display names, set these optional Boolean attributes to true in the include element of requests:

- [includeAttributeValueNames](#)
- [includeAttributeValueDisplayNames](#)

Note: You must use API v37 and above.

See [exportLevels](#), [exportDimensions](#), [exportAccounts](#).

NetSuite Consumer Key and Secret Management

We now manage the NetSuite Consumer Key and Secret for any new NetSuite credentials or token-based authorizations you create. This simplifies the credential creation and maintenance experience for NetSuite Basic, and NetSuite data sources in Design Integrations.

This change does not affect existing NetSuite credentials or configurations.

Consumer Key and Secret

Release: 2023-08-05

You no longer need to copy and paste Consumer Key and Consumer Secret during NetSuite credential creation.

See [Enter NetSuite Keys for Token-Based Authentication, Steps: Set Up NetSuite Credentials](#).

Adaptive Planning - Miscellaneous Enhancements

Dashboard Calculations in Charts

Release: 2023-09-09

Calculations in charts on dashboards now match calculations in reports when calculating:

- Percentages over a range of time.
- Rollups over time ranges where the type of the account is cumulative.
- Metric accounts that use formulas to calculate values.

2023R1 Release Notes

2023R1 Service Pack Release Notes

Release: 2023-06-09

Adaptive Planning - Miscellaneous Enhancements:

- [Adaptive Planning - Miscellaneous Enhancements](#)

Release: 2023-05-12

Adaptive Planning Instance Usage Survey:

- [Adaptive Planning Instance Usage Survey](#)

Release: 2023-04-14

Reports Performance:

- [Reports Performance](#)

Adaptive Planning Instance Usage Survey

We now enable you to tell us how you use your Adaptive Planning instances and instance trees so that we can align your instances for future enhancements, streamlining enhancement implementations.

Instance Usage Survey

Release: 2023-03-11

We add a new Instance Usage Survey link in the System section of the Administration page, enabling you to tell us whether you use your instance or instance tree as either:

- Nonproduction/Sandbox, which you infrequently refresh from production and primarily use for development.
- Nonproduction/Sandbox, which you regularly refresh from production and primarily use for testing.
- Production, which you never refresh.

This enables us to align your instances and instance trees for future enhancements to refreshes and instance management.

Note: Complete this survey by 2023-05-08. If you don't respond by the due date, we assume instance usage for you

Extended Deadline for Instance Usage Survey

Release: 2023-05-12

We provide an extension for the Instance Usage Survey on the Administration page so that you can now answer the survey until 2023-06-09. If you use multiple instances, we recommend that you access each instance to complete the survey based on how your company uses the instance.

We also update the alert banner on the Administration page to reflect this new deadline.

Adaptive Planning User Experience

We continue to align the Workday Adaptive Planning interface with Workday to provide a more consistent user experience.

Reset Password Experience

Release: 2023-03-11

We provide a new look and feel adopting Workday design patterns for the reset password experience.

Welcome Page

Release: 2023-03-11

We provide a new look and feel adopting Workday design patterns for the Welcome page.

Visual Preferences Page

Release: 2023-03-11

With this update, we automatically enable new user interfaces by removing these check boxes from the Visual Preferences page in Administration:

- Dashboards Overview
- Matrix Report Viewer
- Workflow

See [Change Visual Preferences](#).

Sheets Overview

Release: 2023-03-11

To improve the user experience, we redesign the Sheets overview page. We provide a new:

- Add New button with the options Level Assigned Sheet and Assumption Sheet. The options open the existing new sheet workflow in modeling.
- More menu in each sheet row to Rename, Edit, and Delete the sheet. The Edit option opens the existing edit sheet workflow in modeling.

The new updates only display if you have the Model includes: sheets, accounts, dimensions, and formulas permission.

See [Concept: Sheets Quick Tour](#).

Matrix Reports

Release: 2023-03-11

To provide a more seamless user experience, we update matrix reports in Adaptive Planning by:

- Enabling you to expand or collapse all parameters in the report viewer. By default, the parameters display as expanded. The expanded or collapsed state of the parameters persists when you run or save the report.
- Providing a new look and feel for the report snapshot page.
- Providing a new report download page. From this page, you can navigate to the reports overview.
- Providing a new look and feel for the prompting parameters page for matrix reports and report books. From this page, you can now cancel out and return to the report page that you were last on.
- Refreshing the whole page in the matrix report viewer after you select Save As or change a report parameter. Refreshing the whole page instead of sections avoids stale data.

See [Concept: Matrix Reports](#).

Accessibility on Modeling

Release: 2023-03-11

We continue to improve accessibility to help support the Web Content Accessibility Guidelines 2.1.

We continue to deliver this assistive technology support with screen readers and magnifiers:

- Keyboard shortcuts.
- Screen navigation with logical tabbing and alt text for images.

We continue to provide this accessibility functionality on high-use pages in Modeling:

- Levels and Dimensions pages.
- Accounts pages.

Accessibility on Sheets

Release: 2023-03-11

We continue to improve accessibility on sheets to help support the Web Content Accessibility Guidelines 2.1.

We continue to deliver this assistive technology support with screen readers and magnifiers:

- High-contrast color.
- Keyboard shortcuts.
- Screen navigation with logical tabbing and alt text for images.

We continue to provide this accessibility functionality support with screen readers and magnifiers on high-use features in Sheets:

- Cell notes.
- Context menus.
- Sheet grid.

Display Cube Sheet Size

With this release, we enable you to view the percent of capacity that a cube sheet uses for each version. With this information, you can proactively monitor your cube sheet size and make more informed design decisions.

Watch the video: 2m 15s

Visibility to Cube Sheet Size

Release: 2023-03-11

We provide a new View Capacity button on the Sheet Summary of cube sheets in the Modeling area. With this button, we enable you to:

- View the percent of the capacity used per version.
- Link to the troubleshooting topic in the Help Center that can help you decrease the capacity and improve the sheet performance.

We remove all sheet size warning banners that we display on the Sheet Summary of cube sheets and recommend that you use the new button instead.

See:

- [View the Capacity of Cube Sheets.](#)
- [Troubleshooting: Decrease Cube Sheet Capacity.](#)

Version Availability for List Dimensions

With this release, we save you time and effort with improved functionality for managing the version availability of list dimension values.

Watch the video: 3m 13s

Import Dimension Value Availability

Release: 2023-03-11

For fast updates to list dimensions, you can now import version availability.

- In the spreadsheet export, we now enable you to update the version availability in the version columns.
- In the import template, we now enable you to add columns for each version name and make changes to the availability.

See:

- [Import Dimensions and Dimension Values.](#)

Ignore Version Availability in Dimension Imports

Release: 2023-03-11

To improve performance, we now provide a new check box on the Import Dimension Structure dialog for Update and Append. The new check box displays after you select the file to upload, and enables you to ignore the version availability in the import spreadsheet.

View Dependencies Enhancements for Custom Dimension Values

With this release, we improve the **View Dependencies** capability for custom dimension values. In the tabs, we now provide more comprehensive information to help you locate where the model uses and references dimension values. Knowing where to find the dimension values helps you complete required tasks so that you can delete dimension values.

Watch the video: 3m 38s

New View Dependencies Tabs in the Usage Dialog

Release: 2023-03-11

To help you prepare for the deletion of dimension values, we provide new Usage tabs when you click View Dependencies from the Dimension Value Details section in Modeling.

These new tabs offer information that you must resolve before deleting dimension values:

- **Standard Data:** We list the account, version, and level where dimension splits on standard sheets use the dimension value.
- **Modeled Data:** We list the name of modeled sheets that include rows with the dimension value. We also list the version and level.
- **Cube Data:** We list the account code, with the cube sheet prefix where you have associated data with the dimension value on cube sheets. We also list the version, and level.
- **Derived Dimensions:** We list the name of the derived dimension that refers to the dimension value. We also list the version and level.
- **Level Dimensions:** We list level names and level codes that are tagged with the dimension value.

These new tabs provide additional information that you don't need to resolve before deleting dimension values:

- **Transactions:** We list accounts and levels where transactional data has been tagged with the dimension value in all accounts that support transactional data.
- **Link Properties:** We list the account name and code of linked accounts that use the dimension value for Apply Dimension Value or Linked Filters prompts.

See [Resolve View Dependencies to Delete Dimension Values](#).

Updates to Existing Tabs in the Usage Dialog

Release: 2023-03-11

We update existing tabs to provide more information on how the model currently uses the dimension value.

In the **Reports** tab, we now list the username of the report builder. We also include reports that have the specific dimension value in the report builder canvas.

We now list the level code for these existing tabs:

- Shared Formulas
- Cube Entries
- Other Entries

We also change the Rules tab name to Allocation Rules.

See [Resolve View Dependencies to Delete Dimension Values](#).

View Dependencies Enhancements for Accounts, Levels, and Attributes

To help you locate where you use accounts, attributes, and levels in your model, we add new columns to the existing View Dependencies tabs.

Level Code Columns in the View Dependencies Tabs

Release: 2023-03-11

For accounts, levels, and attributes, we add Level Code columns to these existing tabs:

- Cube Entries.
- Other Entries.
- Shared Formulas.

New UserName Column in the Reports Tab

Release: 2023-03-11

We add a new column in the existing Reports tab called UserName. This column indicates the username of the person who created the report that uses the account, attribute, or level.

Plan Publishing Performance and User Experience Enhancements

With this release, we redesigned and improved the financial plan publishing experience. We increase performance by reducing the publishing payload size and optimizing the import process. The interface now includes more accurate error and status messages, and more publishing details.

Note: Your instance must have publishing financial plans already configured.

Publish Workforce Planning Action Removed from Publish Plans Page

Release: 2023-03-11

The original Publish Plans page allows publishing Workforce Planning Actions. The redesigned Publish Plans page disables publishing Workforce Planning Actions. You can still publish Workforce Planning Actions from the Workforce Planning roster modeled sheet.

The redesigned page continues to display new and previous publishing history details for Workforce Planning Actions.

Launch New Publish Task

Release: 2023-03-11

We replace the publish drop down menu in the Publish Plans page with the Launch New Publish Task link. Clicking the link enables you to publish by setting parameters for:

- Publish Type.
- Version.
- Plan.

Note: Parameters vary depending on your publish type.

Redesigned Publish Plans Page

Release: 2023-03-11

With this release, we:

- Shift the publish history to the left pane and populate the right pane with details when you select an item.
- Aggregate all messages across Workday Financials and Adaptive Planning in the redesigned publishing page.
- Enable filtering for publish status and type.

Status, Validation, and Progress Details for Financial Plan Publishing

Release: 2023-03-11

We enhance the Publish Plans history details when you publish financial plans to display:

- Publish parameters including Type, Version, and Plan.
- Overall publish status.
- Job steps in the publish.
- Streamlined validations and Planning contextual messages.

Financial Management Web Services for Plan Publishing

Release: 2023-03-11

With this update, we deliver these new Financial Management web services SOAP APIs in version 40.0 to support publishing financial plans from Adaptive Planning:

- Put Plan Publishing Info (secured to Set Up: Plan Publishing domain).
- Import Plan Publishing CSV File (secured to Set Up: Plan Publishing domain).
- Get Plan Publish Detail (secured to Set Up: Plan Publishing domain).
- Cancel Plan Publish (secured to Set Up: Plan Publishing domain).

Publish Financial Plans Time Span Limit

With this release, we only allow you to select plan structures for publishing that span less than 5 years. This improves publishing performance.

Note: You can use linked virtual parent and child structures that combine to more than 5 years for larger plans.

Select Financial Plan Structure

Release: 2023-04-14

We no longer display financial plan structures that span more than 5 years in the Plan prompt when you select plans to publish.

See [Publish Financial Plans from Adaptive Planning](#).

Workforce Planning Configuration Manager

With this release, we simplify the configuration of Adaptive Planning for workforce planning customers by enabling you to automatically create and maintain planning data and metadata from one location. This reduces implementation time while improving the user experience.

Note: This feature is only available to customers who are implementing Adaptive Planning for the Workforce for the first time. You must contact your Named Support Contact to enable this feature.

Watch the video: 3m 20s

Manage Workforce Planning Configuration Task

Release: 2023-03-11

We deliver a new Manage Workforce Planning Configuration task (secured to the Set Up: Adaptive Planning domain) that you can use to quickly create in Adaptive Planning:

- A level hierarchy.
- Dimensions and dimension values.
- Attributes and attribute values.
- A plan version.
- FTE, Headcount, Cost of Workforce modeled accounts.
- A personnel modeled sheet.
- Integration data sources.
- Integration metadata and data loaders.
- An orchestration task.
- Integration tasks with metadata and data refresh schedules.
- A Workday external system.

To make changes to what you created, unregister this manager, make the changes, and reregister the manager.

Register Workday Credentials for Orchestration

Release: 2023-03-11

We now enable you to register a Workday data source credential for orchestration from Design Integrations so that you can select it during the Select Instance and Activate step of the planning configuration manager.

Modeled Sheet Builder

Release: 2023-03-11

To ensure data integrity when you create a modeled sheet using a workforce planning configuration manager, we disable in the Adaptive Planning modeled sheet builder:

- General Properties options on the Columns and Levels page.
- The ability to add Data Entry, Dimensions, and Attributes columns on the Columns and Levels page.
- The ability to delete any columns generated by the planning configuration manager.
- The ability to edit properties for any columns generated by the planning configuration manager.

You can still create display and level currency columns for modeled sheets created by the planning configuration manager.

For these modeled sheets, we display a banner on the Columns and Levels page indicating that the modeled sheet was created by the workforce planning configuration manager.

Level Admin

Release: 2023-03-11

To ensure data integrity when you create levels using a workforce planning configuration manager, we disable in the Adaptive Planning level admin their:

- Name.
- Code.
- Level attribute value name.
- Level attribute value code.

Note: Level structure and level attribute imports will fail if they alter name and code mappings created by the planning configuration manager.

Dimension Admin

Release: 2023-03-11

To ensure data integrity when you create dimensions and their values using a workforce planning configuration manager, we disable in the Adaptive Planning dimension admin their:

- Name.
- Short name.
- Code.
- Dimension attribute value name.
- Dimension attribute value code.

Note: Note: Dimension structure imports will fail if they alter name and code mappings created by the planning configuration manager.

Attribute Admin

Release: 2023-03-11

To ensure data integrity when you create attributes and their values using a workforce planning configuration manager, we disable in the Adaptive Planning attribute admin their:

- Name.
- Short Name.
- Value Code.

- Value Name.

Note: Attribute structure imports will fail if they alter name and code mappings created by the planning configuration manager.

Account Admin

Release: 2023-03-11

To ensure data integrity when you create accounts using a workforce planning configuration manager, we disable in the Adaptive Planning account admin their:

- Code.
- Account attribute value name.
- Account attribute value code.

If you rename these 3 accounts created by the planning configuration manager, you must create new accounts with the same names:

- Headcount
- Cost of Workforce
- FTE

Note: Account structure imports will fail if they alter name and code mappings created by the planning configuration manager.

Modeled Sheet Rows and Data in Sheet Interface

Release: 2023-03-11

To ensure data integrity when you create a modeled sheet using a workforce planning configuration manager, in the sheet interface we disable your ability to:

- Add data and rows.
- Delete data and rows.
- Edit data and rows.

You can still view rows and data.

Headcount Planning Application

You can now perform bottom-up, position-level workforce planning with a more intuitive experience that also provides the data needed for financial planning. You can configure and initiate a decentralized planning process by dimension while maintaining a single plan. Your business users can quickly contribute to your plan through form entry, streamlining the process.

Note: To use this feature, we require you to configure the workforce planning configuration manager feature with the *Use Plan and Execute Tasks* option selected.

Headcount Planning Event Business Process

Release: 2024-03-09

Workday delivers a new *Headcount Planning Event* business process (secured to the Adaptive Planning for the Workforce functional area), enabling you to:

- Create a plan version in Adaptive Planning using the planned data from this task and copied actuals data from your personnel roster sheet. We also create and lock a baseline version.
- Initiate a decentralized planning process using the Headcount Planning Event business process so that your plan participants can securely and simultaneously contribute their parts of the headcount plan.

We automatically update this Adaptive Planning plan version based on your business users' submissions.

We also deliver a new **Configure Headcount Plan** task that we automatically configure as an initiating action on the new business process.

Note: You must set up the business process using the **Create Business Process Definition (Default Definition)** task before you can use it.

See [Steps: Set Up Headcount Planning](#).

Headcount Planning Tab on the Tenant Setup Report

Release: 2024-03-09

We add a new **Headcount Planning** tab on the **Adaptive Planning** tab of the **Tenant Setup** report, enabling you to specify which ISU to run the background jobs needed for headcount planning. After you create an ISU on the **Public APIs** tab, we automatically create this user in Adaptive Planning.

See [Steps: Set Up Headcount Planning Integration System User](#).

Headcount Planning Event Inbox Items

Release: 2024-03-09

When your *Headcount Plan Event* business process is in progress, plan process controllers can access a new Headcount Planning Event Inbox item (secured to the *Process: Headcount Planning* domain) to:

- Cancel the entire business process event to remove Inbox items and the associated version.
- Close business process events for selected plan participants and remove their Inbox items.
- Edit the headcount plan.
- Pull forward unsubmitted business process events for selected plan participants.

See [Manage Headcount Planning Events](#).

Headcount Planning Participant Detail Event Inbox Items

Release: 2024-03-09

When you configure a headcount plan, we create Inbox items for your plan participants based on:

- Access to the new *Participate: Headcount Planning* domain.
- How you configure the *Headcount Plan Event* business process.
- Their roles in your organization.

These new Headcount Planning Participant Detail Event Inbox items include links to a form-based headcount planning interface that plan participants can use to contribute to their parts of the plans.

Plan participants can:

- Add positions.
- Duplicate existing positions.
- Edit existing positions.
- Remove To Be Hired positions.
- View and refresh key performance indicator charts that display plan progress based on each action that plan participants can take.

See [Complete Headcount Planning Participant Detail Events](#).

View Headcount Planning Configuration Report

Release: 2024-03-09

We deliver a new **View Headcount Planning Configuration** report (secured to the *Process: Headcount Planning* domain), enabling you to easily view these items on the headcount plan:

- Business process.
- Column and form fields details.

- Plan reporting currency.
- Plan start and end date.
- Plan status.
- Supervisory organization.

Correction: This Release Note was inadvertently omitted at the 2023R1 release and is being included now.

Change Log

Headcount Planning Application

We update this release note to change the feature title from "Bottom-Up Workforce Planning" to "Headcount Planning Application."

Preview Date: 2025-02-03. Production Date: 2024-03-09.

User Preference Row Totals in Cube Sheets

You can now configure which visible row totals to display on your cube sheets, enabling you to only display the dimension row totals that matter to you.

Hide Row Totals Tab on Display Options

Release: 2023-03-11

We add a new Hide Row Totals tab on the Display Options menu of your cube sheets, enabling you to configure which visible row totals to display based on the selected dimensions. Row totals are visible based on which dimensions you display on your user view state, and we display those row totals based on your selections on this tab.

Note: We only support instances that don't enable Excel Interface for Planning.

See [Change Cube Sheet View](#).

Web Reports

We continue to enhance the web reports user experience by adding capabilities around linking, drilling, and report parameters.

Add Web Reports Links on Dashboards

Release: 2023-03-11

With this release, we enable you to add links to all web report types from dashboards.

By linking web reports from dashboards, you can both analyze and forecast your plans from a single location. The reports must be shared with you for view access.

See:

- [Add Text to Dashboards](#)
- [Concept: Reports Quick Tour](#)

Live Reports in Announcements Retirement

Release: 2023-03-11

We plan to retire the ability to include live reports as announcements in a future update. We recommend that you use report links on dashboards instead.

Also, we will now display a banner on the Announcements page informing that live reports will be deprecated in an upcoming update. Users can continue to create static HTML and text files as announcements.

Select Drill-Down Options for Matrix Reports

Release: 2023-03-11

With this release, we enable matrix report builders to select the drilling options for reports. Report users can then drill down on the report details using the options that produce valid results.

See [Specify Drilling Options for Reports](#).

Dot Icon for Notes and Contra Accounts

Release: 2023-03-11

We now display a new dot icon next to the contra account indicator when a report row includes:

- A parent contra account with note: The dot icon indicates the presence of notes in child accounts.
- A parent contra account with child contra accounts: The dot icon indicates the presence of child contra accounts.

Reports Performance

With this release, we improve the performance and scalability for large, multi-dimensional matrix reports with sparse data. Users can run matrix reports with more vertically stacked dimensions and larger possible cube intersections with faster load time.

Note: This functionality is now generally available.

Unsupported Features

Release: 2023-04-14

Currently, we don't support these modeling and reports features:

- Version Offset
- Repeating reports
- Display As
- Add Splits
- Alternate calendars
- Spread lookups
- Value lookups
- Text rollups
- Weighted average rollup
- Weighted average translation
- Matrix reports that include:
 - Element attributes in the rows with the **Suppress rows if all zeros or blank** option unselected.
 - Element attributes in the columns with the **Suppress columns if all zeros or blank** option unselected.

Unsupported Accounts

Release: 2023-04-14

To benefit from performance improvement:

- All reports must include at least 1 account.
- For matrix reports with multiple segments, each segment must include at least 1 account.

Currently, we don't support reports with these account types:

- Metric accounts

- System accounts including:
 - Allocations
 - Minority interest percent
 - Eliminations
 - Cumulative translation adjustment
- Model sheet assumption account

Effective Date Support in OfficeConnect for Financial Management

With this release, report creators in OfficeConnect for Financial Management can select an effective date, enabling them to report on dimensions as they were organized in hierarchies on that date. This helps to accurately report for the date in question, or for what-if scenarios.

Watch the video: 4m 57s

Effective Date in OfficeConnect

Release: 2023-03-11

Report creators can now select an effective date for reporting on the dimension hierarchies and values in the model as of that date. An effective date can include:

- Dynamic dates that change. Example: Current date.
- Static dates that the system provides. Example: Quarter end dates for the last two years.
- Static dates that the customer specifies. Example: Future dates or past dates.
- You can select a different effective date for each workbook. You can change the effective date in a workbook and then save it. When you next reopen the workbook, the effective date:
 - Persists if it is a static date.
 - Changes if it is a dynamic date.

See [Set Up the Financial Reporting Data Model](#).

Effective Date in the Financial Reporting Data Model

Release: 2023-03-11

Workday enhances effective dating in the financial reporting data model. Administrators can now specify custom dates that represent special dates to the org. Example: An org change that occurred on a specific date. In addition, the reporting model now includes additional options that are provided by default and cannot be changed.

See [Set Up the Financial Reporting Data Model](#).

Multiple Hierarchy Support in OfficeConnect for Financial Management

With this release, OfficeConnect for Financial Management can now include more than one hierarchy per dimension in the financial reporting data model, enabling report creators to choose from and use any of the available hierarchies in their report. This increases flexibility in reporting by enabling users to use different hierarchies in dimensions like companies, ledger accounts, and cost centers.

Watch the video: 4m 8s

Multiple Hierarchies in OfficeConnect

Release: 2023-03-11

Report creators can now select from and use alternate hierarchies available in the reporting data model. Alternate hierarchies enable users to present different views using the same elements organized differently in each hierarchy.

Example: You recently acquired a company and they're not in the consolidation hierarchy yet. Use alternate hierarchies to report on both:

- The global hierarchy that consolidates all companies.
- The hierarchy of the acquired company that's currently separate.

See [Report on Alternate Hierarchies](#).

Multiple Hierarchies in Financial Reporting Data Model

Release: 2023-03-11

Administrators can now select more than one top-level hierarchy per dimension in the reporting data model. We update the Set Up Financial Reporting and Analytics Data Model task with options to select alternate hierarchies to increase flexibility in reporting on dimensions like companies, ledger accounts, and cost centers.

Example: You recently acquired a company and they're not in the consolidation hierarchy yet. Set up alternate hierarchies to enable reporting on both:

- The global hierarchy that consolidates all companies.
- The hierarchy of the acquired company that's currently separate.

See [Set Up the Financial Reporting Data Model](#).

Dashboard Snapshots

With 2023R1, we now enable you to pause snapshot schedules, making it easier to manage snapshot schedules.

Pause Snapshot Schedules

Release: 2023-03-11

We now enable the option to pause and resume your snapshot schedules. We also add a new Status column to help identify if a schedule is paused or active.

See [Create Perspective Snapshots](#).

Scatter Chart on Dashboards

With 2023R1, we now enable you to use scatter charts in dashboards, giving you more ways to visualize your data.

Scatter Chart

Release: 2023-03-11

You can now add scatter charts to your dashboards in all Workday Adaptive Planning configurations. The Scatter chart is now in the list of available charts in edit mode.

See [Create a Scatter Chart](#).

Sheets on Dashboards

With 2023R1, we continue to improve sheets on dashboards, enabling more flexibility with performance.

Optimize Sheets on Dashboards

Release: 2023-03-11

We improve the Optimize Sheet option for sheets on dashboards. The Optimize Sheet option enables you to use a new version of sheets on dashboards that improves load times.

For modeled sheets with Optimize Sheet enabled, you can now:

- Enter, edit, and delete values.
- Copy and paste multiple rows.
- Add rows.
- Save changes made to the sheet.

For all types of sheets with Optimize Sheet enabled, you can also:

- Make column size changes and the changes save to your sheet view.
- View cell notes in a pop-up window.

Text on Dashboards

With 2023R1, you can now add web report links to text on dashboards, helping you add links to reports without leaving dashboards.

Add Web Report Links to Dashboards

Release: 2023-03-11

You can now use the Insert Link option in text on dashboards to add links to your shared reports. There is a new Link Type field with the options:

- Report. Displays the Shared Report field to browse shared reports.
- URL. Displays the Enter a URL field.

See [Add Text to Dashboards](#).

NetSuite Endpoint Upgrade

With this release, we support NetSuite Web Services 2022.1. This ensures continuity of NetSuite support.

Upgrade to NetSuite Web Services 2022.1

Release: 2023-03-11

We enable you to upgrade to 2022.1:

- By clicking a link in the actions pane for existing NetSuite data sources in Design Integrations.
- By accessing NetSuite Basic, without requiring interaction.

See [Upgrade NetSuite Data Sources](#).

NetSuite 2018.1 Support Removed

Release: 2023-03-11

We remove support for NetSuite 2018.1.

Specify Integration Task Order

We enable you to specify the order that loaders run within an integration task. This improves the user experience in Design Integrations, providing visibility and control of your integration loader sequence.

Order Loaders

Release: 2023-03-11

Click Manage Loader Run Order in an integration task to enable sequencing of loaders. The task grid then enables these buttons on each row for specifying the loader order:

- Top
- Up
- Down
- Bottom

Note: You can no longer schedule subtasks once you enable this feature.

See [Reorder Integration Tasks](#).

Loader Sequence Messages

Release: 2023-03-11

When you set a loader sequence, the progress monitor window and logs enumerate the loaders to help you troubleshoot integration task runs.

See [Reorder Integration Tasks](#).

Delta Replace Mode for Standard Data Import API

We introduce delta replace mode for the importStandardData API, making data imports more performant. You can load only the changes to existing data in Adaptive Planning by specifying a scope.

You must use API v36.

Scope for Replace Mode

Release: 2023-03-11

We introduce a scope element for replace mode that must contain:

- 1 time element.
- 1 accounts element.
- 1 levels element.

The scope limits what data is replaced.

See [importStandardData](#).

Import Standard Data Replace Mode API Erase Permission

Release: 2023-03-11

Users making importStandardData requests require Erase Data permissions for API v36 to support replace mode.

See [importStandardData](#).

JSON Formatted REST API Endpoints

We deliver new JSON formatted REST API endpoints, enabling you to create applications and integrations based on Adaptive Planning modeled sheets, currencies, exchange rate types, time, and versions.

Modeled Sheet Definition API

Release: 2023-03-11

If you want to define a modeled sheet in Adaptive Planning, you can now use the modeled sheet JSON formatted REST API endpoint. This API supports:

- PATCH
- DELETE

See [Modeled Sheet Definition](#).

Time API

Release: 2023-03-11

If you want to append, reload, or update your time structure you can now use the time JSON formatted REST API endpoint. This API supports:

- POST

See [Time](#).

Versions API

Release: 2023-03-11

If you want to create, update, or delete versions you can now use the versions JSON formatted REST API endpoint. This API supports:

- GET
- PATCH
- POST
- DELETE

See [Versions](#).

Currency API

Release: 2023-03-11

If you want to create, update, or delete currencies you can now use the currency JSON formatted REST API endpoint. This API supports:

- POST
- DELETE

See [Currency](#).

Exchange Rate Type API

Release: 2023-03-11

If you want to create, update, or delete versions you can now use the versions JSON formatted REST API endpoint. This API supports:

- GET
- POST
- DELETE

See [Exchange Rate Type](#).

Cube Sheet Data Replace Mode

With this release, we improve Replace Import Mode performance for cube sheet data in Planning Data Loaders, increasing the maximum payload size.

Larger Cube Data Payloads

Release: 2023-03-11

We no longer limit the Replace Import Mode payload size to 145 MB in Planning Data Loaders.

See [Create Planning Data Loaders](#).

Adaptive Planning Translations

We expand our local language support by adding French (Canada) and Italian to Adaptive Planning.

Adaptive Planning Translations

Release: 2023-03-11

We now provide translations for Adaptive Planning users in:

- French (Canada)
- Italian

See [Reference: Technology Requirements](#).

Prevent Locked Time Period Import to Modeled Sheets

With this release, we prevent Excel template imports to modeled sheets when the templates contain locked time periods. This ensures data integrity.

Error Message for Locked Time Periods

Release: 2023-04-14

Excel template imports to modeled sheets now fail with an error when their headers contain locked time periods. Before this release, an error only displayed if locked time period columns contained data.

Adaptive Planning - Miscellaneous Enhancements

Support CSV Format for Dimension Imports

Release: 2023-03-11

To support large data sets, we now enable you to import custom dimensions and values in CSV file format.

OfficeConnect Expand Capability

Release: 2023-03-11

You can now cancel the Expand process for parent elements while it's in progress. This enables you to cancel the process if you:

- Started the process accidentally.
- Want to run the process at a more convenient time.

See [Steps: Explore Reports Using Ad Hoc Analysis](#).

Currency Conversion Enhancement

Release: 2023-03-11

When cells in the Currency Exchange Rates sheet in Modeling are blank, the currency conversions throughout the model now return zero for the corresponding time periods.

Rollup Values in Reports with Level Attribute Filters

Release: 2023-03-11

For accounts with Weighted by Average time rollups, we now filter report values by the level attributes when the level has an attribute.

Clean Up Extraneous Audit Trail Data

Release: 2023-06-09

We remove extraneous audit trail data to reduce your data volume, making it easier for you to find the audit trail data you need.

We only remove audit entries generated by importing a preexisting value that resulted in no change in data.

2022R2 Release Notes

2022R2 Service Pack Releases

Release: 2022-11-18

- [Cancel Show Details](#)
- Export Configurable Model Data API:
 - [API Version 35](#)
 - [Request Raw Data In exportConfigurableModelData](#)
 - [Escape Double Quotes in String Values](#)
 - [Status Messages for Streaming exportConfigurableModelData](#)
 - [Prefix Removed from parentId in Data Output](#)

Release: 2022-11-11

- [Reset User Sync Mapping Between Workday and Adaptive Planning](#)

Release: 2022-10-14

- [Select Cells for Simple Calculations](#)
- [Schedule Publish Plans](#)

Adaptive Planning User Experience

We continue to align the Workday Adaptive Planning interface with Workday to provide a more consistent user experience.

Adaptive Planning Banner

Release: 2022-09-10

To improve the user experience, we update the Workday Adaptive Planning banner on all pages by:

- Adding a new header navigation icon.
- Displaying the full breadcrumb names, instead of truncating them.
- Enabling all users to access visual preferences and add a customer logo. Customer logos display next to the navigation icon.

See: [Concept: Navigation Quick Tour](#).

Adaptive Planning Footer

Release: 2022-09-10

To improve the user experience, we remove the Workday Adaptive Planning footer on all pages, except for sheets. On sheets, we update the current footer to display currency information and access to keyboard shortcut information.

See [Concept: Sheets Quick Tour](#).

Reload Replaces the Reload Entire Dimensions option

Release: 2022-09-10

To improve clarity for custom dimension imports, we rename the Reload Entire Dimension(s) import option to Reload.

See: [Import Dimensions and Dimension Values](#).

Accessibility on Sheets

Release: 2022-09-10

We improve accessibility on sheets to help support the Web Content Accessibility Guidelines 2.1.

We provide this assistive technology support with screen readers and magnifiers:

- High-contrast color.
- Keyboard shortcuts.
- Screen navigation with logical tabbing and alt text for images.

For all sheet types, we provide assistive technology support with screen readers and magnifiers in new drop-down menu trees on:

- Cell notes.
- Sheet notes.
- The Filter Rows tab on the Display Options.
- The toolbar at the top of your sheet.

For all sheet types, we also provide assistive technology support with screen readers and magnifiers on new drop-down menu trees when you:

- Apply a breakback method.
- Change dimensions.
- Copy downward or forward.
- Open and drill down on sparkline graphs.
- Right-click on a cell, row header, or column header.

Note: You can disable the new drop-down menu trees by unselecting the Apply New Drop-Down Lists on Sheets check box on the Visual Preferences page in administration.

See [Reference: Accessibility in Adaptive Planning](#).

Accessibility on Modeling and Administration

Release: 2022-09-10

We improve accessibility to help support the Web Content Accessibility Guidelines 2.1.

We deliver this assistive technology support with screen readers and magnifiers:

- Keyboard shortcuts.
- Screen navigation with logical tabbing and alt text for images.

We provide this accessibility functionality on high-use pages in Modeling:

- Currencies.
- Dimensions.
- Formula Validation.
- Modeling Overview.
- Level Assigned Sheets Overview.
- User Assigned Sheets Overview.
- Version Admin Page, except for the version list navigation tree.
- View Dependencies window, accessed from the General Ledger Accounts and Levels page.

We also provide this accessibility functionality on high-use pages in Administration:

- Administration Overview
- Profile and Preferences

Accessibility on Dashboards

Release: 2022-09-10

We improve accessibility on dashboards to help support the Web Content Accessibility Guidelines 2.1.

In dashboards edit mode, we provide assistive technology support with screen readers and magnifiers on all:

- Charts.
- Menus and drop-downs.
- Tabs and panels.

We also now add:

- A new actions menu for Text on dashboards that includes Copy and Delete options.
- Move Up and Move Down options in the conditional formatting action menus.
- Rename, Move Left, and Move Right options in the Dashboard actions menu.

New Chart Editing Icons on Dashboards

Release: 2022-09-10

We display these new icons when you add and edit charts on dashboards:

- Accounts
- Appearance Settings
- Charts
- Collapse
- Data Settings
- Expand
- Time Settings

New Version Button on Sheets with Sales Planning

Release: 2022-09-10

If you purchased and enabled Sales Planning, we now display a New Version button in the Versions drop-down menu on sheets.

Search Content in Matrix Reports

Release: 2022-09-10

For faster navigation and access to relevant content, we now enable you to search matrix report content including:

- Account names.
- Dimensions.
- Values.
- Notes.

You can only search for data that's visible on the report. We don't enable you to search for content in footnotes or content that requires drilling into the report.

The search only supports values where the sequence matches exactly. Example: To search for 16,767, the user must type it in with the comma delimiter.

Note: If you opted out of the new matrix report interface, we recommend that you start using it. Workday plans to remove the ability to opt out of the new matrix report interface in Workday 2023 Release 1.

Alternate Calendars

With this release, you can now use alternate calendars, enabling you to provide rollup structures for times that differ from your primary calendar.

Watch the video: 7m 58s

Import Alternate Calendars

Release: 2022-09-10

We now enable you to import up to 3 alternate calendars in the Time area of Modeling. You can now use the TimeStructure spreadsheet to:

- Add columns for the alternate calendars that map to the leaf strata from the default calendar.
- Add rows below your default calendar for each alternate calendar.
- Choose at least 1 common time strata to share with the default calendar. At minimum, the alternate calendars must share the smallest strata with the default calendar.
- Choose a fork strata for each alternate calendar. The last strata shared with default calendar is the fork strata.

We also provide a new Calendar prompt in the Time area of Modeling, which is separate from the Time Period prompt. The new Calendar prompt enables you to select different calendars so that you can review the alternate time structures and the Strata Rollup section.

See:

- [Setup Considerations: Alternate Calendars.](#)
- [Add Alternate Calendars.](#)
- [Concept: Adaptive Planning Time and Calendars .](#)
- [FAQ: Calendars.](#)

Change Calendar Names

Release: 2022-09-10

We provide a new Rename Calendar button in the Time area of Modeling, enabling you to change the names of your imported calendars. We also update the Delete prompt so that you can delete imported calendars.

Improved Visuals in Strata Rollup

Release: 2022-09-10

For added clarity, we now automatically update the Strata Rollup section when you select a calendar in the Calendar prompt in the Time area of Modeling.

We also remove the color indicators and instead display new icons and text as visual indicators, helping you better identify the Default and Fork strata of the calendar you select.

View Alternate Calendars on Reports

Release: 2022-09-10

We now enable you to use alternate calendars to report using time granularities that don't exist in the default calendar structure. For both OfficeConnect and matrix web reports, we display the default and alternate calendars in the Elements tab in Time.

Report builders can apply different time elements from alternate and default calendars to your reports. Report users can view the data rolled up differently from the default calendar.

See:

- [Display Alternate Calendars in Matrix Reports.](#)
- [Display Alternate Calendars in OfficeConnect Reports.](#)

View Rollups of Alternate Calendars on Dashboard

Release: 2022-09-10

We now support alternate calendars in dashboards. You can select between the default and alternate time calendars for chart time settings and time filters. We also now support alternate calendars and time rollups on dashboards.

Alternate Calendar Support for APIs

Release: 2022-09-10

To support alternate calendars, we:

- Deliver a new exportCalendar API that you can use to export default and alternate calendar information, and calendarIds.
- Update the exportTime API to enable you to export your time configuration by calendarId. We export the default calendar if you don't specify a calendarId.

Note: To use this functionality, you must use v33 or higher in the API requests.

See:

- [exportTime](#).
- [exportCalendar](#).

Alternate Calendar Support for Integrations

Release: 2022-09-10

We now enable alternate calendars in Adaptive Planning Integrations. You can select an aggregation stratum from any of your calendars within the Planning Data Source for:

- Cube sheet sources.
- Custom sources.

See [Steps: Set Up Planning Data Sources](#).

View Alternate Calendars on Sheets

Release: 2022-09-10

Workday now supports alternate calendars on sheets. We add a new Calendar prompt in the display options, enabling you to select up to 3 alternate calendars to display.

To maintain data integrity when you view your sheet using alternate calendars, we prevent you from:

- Adding a row.
- Copying a cell value and pasting.
- Copying a row and pasting.
- Drilling into transactions.
- Using Cell Explorer.

You can still save your alternate time selection as your user view state.

Note: We don't support alternate calendars with Excel Interface for Planning.

See:

- [Change Cube Sheet View](#).
- [Change Modeled Sheet View](#).
- [Change Standard Sheet View](#).
- [Reference: Sheet Toolbar](#).

Contra Accounts

With 2022R2, we now enable you to use contra accounts in Adaptive Planning, helping you better align your account hierarchy with source systems.

Watch the video: 4m 36s

Contra Accounts for Modeling

Release: 2022-09-10

With this update, you can now change the Balance Type account details on a general ledger account. When you change the balance type of an account to be different than the root account it rolls up to, the account becomes a contra account. Using contra accounts reduces rollup values while reducing the manual effort needed to enter negative numbers.

We also deliver these new columns when you export spreadsheets for your accounts:

- Balance Type, which you can use to change the account type to credit or debit.
- Contra Account, which indicates contra accounts in your account structure.

We also add the new Balance Type column to the template you can use for importing accounts.

See [Concept: Balance Types and Contra Accounts](#).

Contra Accounts for Standard and Cube Sheets

Release: 2022-09-10

For clarity, we now display an icon next to contra accounts and contra account rollups on:

- Sheet rows on standard and cube sheets.
- Sheet columns on cube sheets.
- The Explore Cell for accounts and contributing accounts on standard and cube sheets.

When you have a contra account on a sheet, you can also view these items in the printable view:

- Contra Account column on standard and cube sheets.
- Contra Account row on cube sheets.

On the printable view of a sheet, we also add a new Contra row on the Information about this Sheet tab when you:

- View by level or select an account on standard and cube sheets.
- Pin an account on cube sheets.

See [Reference: Colors and Notations in Sheets](#).

Support for Contra Accounts in APIs

Release: 2022-09-10

We now support contra accounts in `updateAccounts` and `createAccount` APIs to:

- Set the balance type for an account.
- View if an account is a contra account.

See:

- [updateAccounts](#).
- [createAccount](#).

Support for Contra Accounts in Adaptive Planning Integration

Release: 2022-09-10

With this update, you can now update the balance type for general ledger accounts using the Account loader in Adaptive Planning integrations.

See [Create Planning Account Loaders](#).

Ledger Account Normal Credit or Debit Balance Report Field

Release: 2022-09-10

We deliver a new Ledger Account Normal Credit or Debit Balance report field on the Plan Dimension business object (secured to the Public Reporting Items domain) that you can use in condition rules and custom reports to view whether a ledger account has a normal credit or debit balance.

Support for Contra Accounts in Dashboards

Release: 2022-09-10

We update dashboard charts by now indicating when an account is a contra account. When you include a contra account in a waterfall chart, we also now invert the breakdown to ensure that the sum of the waterfall steps equals the comparison value.

Contra Accounts for EIP

Release: 2022-09-10

To improve the user experience and support contra accounts, we update sheets by now indicating when an account is a contra account.

Contra Accounts for Matrix Reports

Release: 2022-09-10

In the matrix report viewer, we now indicate when an account is a contra account. Workday also now bases the Reverse Sign property in Difference calculation elements on the balance type, not root account.

Contra Accounts for OfficeConnect

Release: 2022-09-10

When you use contra accounts in OfficeConnect, we now enable you to indicate the accounts in the Microsoft Excel report. You can apply a new Account Contra Indicator label on your report to view the indicator, and we also display the indicator in the Review tab for cell, row, column, workbook, and worksheet nodes.

See [Reference: Report Label Types and Values](#).

Update and Append Attributes

With 2022R2, we enable you to add new account, level, and custom dimension attributes and attribute values as well as update attributes and attribute values with 1 import, saving you time and effort.

Watch the video: 2m 52s

Update and Append Attribute Structure

Release: 2022-09-10

We remove the Append option when you import attribute structures in the Modeling area for:

- Account Attributes
- Dimension Attributes
- Level Attributes

Instead, we deliver a new Update and Append option. This enables you to add new attributes and attribute values and update existing settings with 1 import.

See [Import Attributes and Attribute Values](#).

Reload Replaces the Reload Entire Structure Option

Release: 2022-09-10

To improve clarity for attribute imports, we rename the Reload Entire Structure import option to Reload.

See [Import Attributes and Attribute Values](#).

Improved Cube Account Settings and Imports

With 2022R2, we improve cube account settings and spreadsheet import capabilities.

Actuals By and Plan By Setting for Cube Accounts

Release: 2022-09-10

We now enable you to select options for the Actuals By and Plan By settings on cube sheet admin pages for these cumulative accounts:

- Cube-entered custom.
- Cube-entered general ledger.
- Cube calculated.

See [Reference: Settings for Cube-Entered Accounts](#).

Import More Settings for Cube-Entered Accounts

Release: 2022-09-10

For a more consistent experience, you can now import these settings for cube-entered general ledger and custom accounts using the cube sheet Accounts spreadsheet:

- Add Link Accounts
- Apply Dimension Value
- Change Sign +/-
- Decimal Places
- Default Formula
- Exchange Rate
- Link Filter

Replace Mode for Cube Data Import in Planning Data Loaders

With this release, we introduce replace mode for cube data import within planning data loaders. This improves import performance and enables imports to cube accounts hidden from the user.

Replace Mode Import Settings

Release: 2022-09-10

We deliver a new Enable Replace Mode when you select a cube sheet in the Data Source Settings. This enables you to load data into:

- All of the cube accounts on the cube sheet you select.
- Specific cube accounts based on an accounts parameter you set up.

Note: If you enable replace mode, we hide the Erase Settings tab.

See [Create Planning Data Loaders](#).

Sheets on Dashboards

With 2022R2, we continue to improve sheets on dashboards, enabling more flexibility with performance and options to view sheets.

Optimize Sheets on Dashboards

Release: 2022-09-10

We deliver a new Optimize Sheet option in Data Settings when you edit or create a sheet on dashboards. This enables you to use a new version of sheets on dashboards that improves load times.

When you enable the new option, you can:

- Only view data on the sheet. To add or edit data, you can maximize the sheet.
- Search and filter sheet data. All other toolbar options are only available in maximize view.

- Select dimension pickers on cube sheets. We grey out dimension pickers that match perspective context filters.

When you use the new option, we also:

- Refresh all sheets when you change perspective filters and automatically save your changes.
- Persist views between the default and maximize view.

Optimize Sheets on Dashboards

Release: 2022-09-10

You can now enable the Optimize Sheets on Dashboards feature using a new Optimize Sheets toggle for Dashboards check box in Visual Preferences.

Select Cells for Simple Calculations

Release: 2022-09-10

We now provide simple calculations when you select more than 1 cell to match the experience in standalone sheets. You can display the calculations for:

- Average
- Count
- Count Nums
- Max
- Min
- Sum

Select Cells for Simple Calculations

Release: 2022-10-14

We now provide simple calculations when you select more than 1 cell in sheets on dashboards when **Optimize Sheet** is enabled. You can display the calculations for:

- Average
- Count
- Count Nums
- Max
- Min
- Sum

Copy Charts and Dashboards

With this release, you can now copy charts and dashboards and paste to any dashboard or perspective, making it easier to build and create new dashboards.

Copy and Paste Charts on Dashboards

Release: 2022-09-10

In the More menu on charts, we rename the Duplicate chart option in edit mode to Copy, clarifying that you can now copy and paste charts to any dashboard or perspective. We include all of your configurations when you copy and paste a chart.

After you click the Copy chart option, we display a confirmation message when the chart is ready to paste on any dashboard or perspective. To paste the chart, you can right-click in the dashboard area or use the More menu of the dashboard tab.

Note: You can only copy 1 item at a time. If you delete the copied chart, you can no longer paste it.

See:

- [Example: Create KPIs for Variance Between Planned Product Revenue and Actuals.](#)
- [Example: Create Multiseries Column Charts for Product and Service Revenue.](#)

Copy Dashboards

Release: 2022-09-10

In the More menu on the dashboard tab, we rename the Duplicate dashboard option in edit mode to Copy, clarifying that you can now copy and paste dashboards to any perspective.

After you copy a dashboard, we display a confirmation message when the dashboard is ready to paste on any perspective.

We also add a new Add a Dashboard icon with these options:

- New Dashboard
- Paste Dashboard

To paste a dashboard, you can use the new Paste Dashboard option while in edit mode.

Note: You can only copy 1 item at a time. If you delete the copied dashboard, you can no longer paste it.

See: [Copy Dashboards](#).

Bulk Add Rows on Cube Sheets

We now enable you to add rows in bulk onto cube sheets and sheet dials on dashboards. You can multiselect the innermost values of your nested row structure when you add rows. This saves you time when entering cube sheet data and provides more support for multidimensional planning.

Multiselect on Add Row Dialog for New Rows

Release: 2022-09-10

When you add a row on your cube sheet, we now enable you to select up to 6 dimensions and create a row for each of the dimensions. You can only multiselect for the innermost values on your nested dimension structure.

See [Add Rows in Cube Sheets](#).

Streaming Data for the Planning Data Source

Note: We revert this functionality from Production tenants on 09-16-2022. We plan to redeliver it to Production in a future update.

With this release, we enable data streaming from the Planning Data Source in Adaptive Planning Integrations, improving export performance.

Planning Data Source

Released: 2022-09-10

The Planning Data Source now enables you to stream data. To stream data, you must use API v33 or higher.

See [Steps: Set Up Planning Data Sources](#).

Export Configurable Model Data API

With this release, we continue to improve the exportConfigurableModelData API. You can now specify the columns you want to export, increasing performance and efficiency. We also enable you to set the decimal precision of the data.

Columns Filters in exportConfigurableModelData

Release: 2022-09-10

With this update, you can specify which modeled sheet columns you retrieve by including those columns in the `exportConfigurableModelData` filters element.

If you don't specify columns, all of the modeled sheet columns return in the response.

Note: To use this functionality, you must update the API to v33 or above. This also requires you to set `isGetAllRows` to true for the modeled sheet element.

See: [exportConfigurableModelData](#).

API Version 35

Release: 2022-11-18

We now release API version 35.

[Adaptive Planning REST API](#)

Request Raw Data in exportConfigurableModelData

Release: 2022-11-18

You can now include `useActualData=true` in the modeled sheet element when you stream data, enabling you to ignore the account decimal precision. We export calculated accounts at 9-decimal precision.

Note: To use this functionality, you must use API v35 and not include `useAccountPrecision` in the request, or set it to false.

See: [exportConfigurableModelData](#).

Escape Double Quotes in String Values

Release: 2022-11-18

We now automatically escape double quotes in string fields for dimension values and text fields to make exports easier to process.

Note: You must use API v35 and set `isGetAllRows` to true.

See: [exportConfigurableModelData](#).

Status Messages for Streaming exportConfigurableModelData

Release: 2022-11-18

We now include this information in the response when you stream data from `exportConfigurableModelData`:

- A status tag with a Boolean success attribute.
- A total row count for the data tag.
- A row count sent in the status tag.

Note: You must use API v35 and set `isGetAllRows` to true.

See: [exportConfigurableModelData](#).

Prefix Removed from parentId in Data Output

Release: 2022-11-18

We no longer include the s prefix for parentId data output with API v35 when `useNumericIds=true`.

See: [exportConfigurableModelData](#).

Account Data Precision for exportConfigurableModelData

Release: 2022-09-10

We add a new `useAccountPrecision` attribute in the modeled sheet element on the `exportConfigurableModelData` API. When you set the new attribute true, we export data for accounts at the account decimal precision. When you set it to false or if you don't include the attribute, we export data at nine-decimal precision.

Note: To use this functionality, you must update the API to v33 or above. This also requires you to set `isGetAllRows` to true for the modeled sheet element.

See: [exportConfigurableModelData](#).

Security APIs for Adaptive Planning

We now enable all customers to use security APIs. You can use the APIs to set up custom integrations, saving you time and manual effort.

Note: You must contact your Service Executive or Named Support Contact to enable this feature. We only recommend that you use this feature if you have over 100 planning users.

Permission Set REST API

Release: 2022-09-10

We deliver a new Permission Set REST API endpoint. When you set up instance assignments, you can use the new endpoint to quickly assign Adaptive Planning permission sets to users.

See [Permission Sets](#).

Multiple Instance User Access REST API

Release: 2022-09-10

We deliver a new Multi-Instance User Access REST API endpoint. When you link multiple Adaptive Planning instances, you can use the new endpoint to assign a user to multiple instances and designate the default instance.

See [Instances](#).

importGroups API

Release: 2022-09-10

We deliver a new `importGroups` API that you can use to import Workday security groups and their associated users into Adaptive Planning. You can also use the new API to import user groups from external sources.

This enables you to use external user groups in planning security contexts, such as in processes, access rules, and version access.

See [importGroups](#).

View External User Groups

Release: 2022-09-10

For convenience, you can now view external user groups, such as Workday security groups, in the Global User Groups section on the Administration page.

Note: You can't edit external user groups on the tab. We recommend that you use the new `importGroups` API to update external user groups instead.

See [Create User Groups](#).

Schedule Publish Plans

You can now schedule when to publish financial plans from Adaptive Planning to Workday Financials. This automates the recurring ad-hoc process by enabling planners to publish during off-peak hours.

Create Publish Plan Tasks in Design Integrations

Release: 2022-09-10

We deliver a new Publish Plan integration task type that you can use to schedule publishing a plan to Workday Financials. You can configure the integration task to run:

- Hourly
- Daily
- Weekly, or
- Monthly

To schedule, you must have access to the Integration Operator and Data Designer permissions.

When you schedule, you receive a notification indicating scheduling success or failure. The publish history page indicates the publish status.

See [Schedule Publish Plans](#).

Create Publish Plan Tasks

Release: 2022-10-14

You no longer need to submit an Account Provisioning Ticket to request the Schedule Publishing Financial Plans feature.

To use this feature, you must either:

- Add the Financial Plan Type Segment and the Integration System Security Group (ISSG) to this segment-based security group: *Financial, Positions, and Award Plan Type Segment*.
- Add the Adaptive_Integration_Sys_Security_Group to the security policy of the *Plan Event* and the *Headcount Plan Event* business processes.

Then, you must add the:

- Integration System User (ISU) security group to the *Set Up: Plan Publishing* domain, and *Adaptive_Integration_System_User* to the *Adaptive Plan Publisher* security group.

Effective Date in Workday Data Sources from Workday Financials

We enable Report Effective Date/Time in Workday Data Sources from Workday Financials, improving the performance of data loads from Workday Financials into Adaptive Planning.

Filter by Effective Date

Release: 2022-09-10

When you edit a report for Workday Data Sources in Adaptive Planning Integration, you can select the report Effective Date as a parameter to filter the data and reduce load time.

See: [Select Workday Reports in Workday Data Sources for Adaptive Planning](#).

Adaptive Planning Permissions

We deliver new permissions to provide you with greater flexibility and control over user access.

Download Data to Excel from Sheets or Reports

Release: 2022-09-10

We deliver 2 new permissions that enable users to download:

- Report data to Excel.
- Sheets data to Excel

This enables you to secure access at a more granular level.

Note: We only display the Download button on sheets when the user has access to download data to Excel from sheets.

See [Reference: Available Permissions](#).

Create Personal Reports

Release: 2022-09-10

We add a new Create Personal Reports permission that enables users to both create and view personal reports. When you disable the new permission, users can only view shared reports.

See [Reference: Available Permissions](#).

View and Edit Permissions for Dashboards

Release: 2022-09-10

We update the Access Dashboards permission so that you can configure access at a more granular level. You can now use the permission to enable users to only view dashboards.

We also deliver 3 new dashboard permissions that enable users to:

- Create and Schedule Snapshots.
- Edit Dashboards.
- View Snapshots.

Note: We don't automatically update access permissions for users that already use dashboards.

See [Reference: Available Permissions](#).

Adaptive Planning Performance and Scalability

We now deliver performance and scalability improvements that enable you to model your business without compromising ease of use.

Assigned To Prompts on Process Overview Page

Release: 2022-09-10

We update the Assigned To prompt on the Processes Overview page to now display a compacted list, instead of a list of tiles, at the top of the page and when you:

- Create a new task.
- Reassign an existing task to someone else.

We also remove profile avatars from the Assigned To prompt and process tracker overview cards.

Note: You no longer need to contact your Named Support Contact to enable this feature.

OfficeConnect Ad Hoc Analysis

With this release, we continue to improve the OfficeConnect ad hoc analysis functionality for Adaptive Planning and Financials. We now enable users to exclude rows with no data, providing more focused dimensional analysis.

Exclude Rows with No Data

Release: 2022-09-10

Watch the video: 2m 8s

We now provide this new option that you can use to filter out blank rows from expansions: **Exclude rows with no data**. This enables users to focus on the data that they care about and also makes large expansions possible for larger models.

If you expand any new parent elements, OfficeConnect automatically selects the new option in the Expand dialog. You can unselect the option to display rows with no data. When you save a workbook, we persist the selection status of the new option for all expansions.

See [Steps: Explore Reports Using Ad Hoc Analysis](#).

User Defaults for New Expansions

Release: 2022-09-10

You can now configure these as defaults for new elements that you expand from your user settings:

- Expand row above or below.
- Expand columns left or right.
- Exclude uncategorized elements when expanding.
- Exclude eliminations elements when expanding (available only for Financials data source).

Also, we enable you to change those settings later without having to collapse and re-expand, saving you time.

See [Reference: User Settings Fields](#).

Expand Options

Release: 2022-09-10

We now provide this new user setting: **Always prompt for expand options**. When you enable the new user setting, we always display the Expand dialog with its settings if you expand a single parent element.

See: [Reference: User Settings Fields](#).

Modify Existing Expansions

Release: 2022-09-10

We now add a new **Modify Expansion** option that enables you to update existing expansions without recreating them. We add the new option in the:

- Expand group of options in the OfficeConnect tab.
- Expand options in the OfficeConnect context menu.

When you click **Expand** again for an existing expansion, it persists the settings from when you last modified the expansion.

Apply Row or Column Currency to Descendants

Release: 2022-09-10

We now enable you to apply the row or column currency to the descendant rows or columns when you expand. This enables you to report with rollups that add up using the same currency.

We only enable you to use the **Apply the Row/Column Currency to Descendants** option in the Expand dialog when:

- The workbook uses Level or Corporate currency.
- You apply a Level or Company element on the row or column.
- You don't select this option: **Exclude rows with no data**.

See [Steps: Explore Reports Using Ad Hoc Analysis](#).

Expand Multiple Parents Based on Element Type

Release: 2022-09-10

We now provide a cartesian of expanded element types, rather than of entities. When you expand a row with multiple parents, this ensures more concise results and provides a more intuitive experience when you view rollups.

Example: You expand a row with an Assets parent and a Liabilities parent. Both parents have the element type of Accounts. The resulting expansion now produces a flat list of the children under Assets and the children under Liabilities. We no longer display a cross-entity list of each Assets child and each Liabilities child.

Note: We automatically update your existing expansions that contain multiple parents to reflect the new behavior.

See [Example: Expand Report Elements for Ad Hoc Analysis](#).

Journal Line Details in OfficeConnect for Financial Management

We enhance OfficeConnect for Financial Management by improving how you report on journal lines. You can now drill down into journal line details and drill into Workday to view related journals and transactions.

Show Details for Report Cells

Release: 2022-09-10

Watch the video: 3m 27s

We now enable you to use the Show Details option for a report cell to display the contributing journal lines in a separate Excel worksheet. You can use the details on the worksheet to:

- Understand how data adds up for the cell.
- Confirm the validity of the data.

See [Display Journal Line Details for Report Cells](#).

Dimension Type Name Change

Release: 2022-09-10

We now rename the Uncategorized node for specific dimension types to (Uncategorized/Blanks). This clarifies that the nodes include intersections where the given dimension has no data.

Example: Cost Center (Uncategorized/Blanks) includes all journal lines where the cost center has no data or value.

Cancel Show Details

Release: 2022-11-18

You can now cancel the Show Details process while it's in progress. This enables you to cancel the process if you:

- Started the process accidentally.
- Want to run the process at a more convenient time.

We also enhance the overall performance of OfficeConnect. This enables both Adaptive Planning and Financial Management customers to refresh your reports faster.

Level, Dimension, and Attribute Codes for Display Names

We now automatically enable the ability to import data without Code and Name columns for dimension values, attributes values, and levels. This improves the user experience by removing the need to rename text fields in modeled sheets containing the reserved keywords of name and code in labels. It also simplifies importing for languages other than English.

Single Column Data Import in Adaptive Planning APIs

Release: 2022-09-10

We now support attribute and dimension tagging in API v34 and newer with a single property for value.

For API v34 and newer, we no longer support valueName and valueCode. You can use these instead:

- updateAccounts
- updateDimensions
- updateLevels
- exportAccounts
- exportDimensions
- exportLevels

Note: For API v34 and newer, we no longer support valueName and valueCode.

See:

- [updateAccounts](#).
- [updateDimension](#).
- [updateLevels](#).
- [exportAccounts](#).
- [exportDimensions](#).
- [exportLevels](#).

Chinese (Simplified) Language Support

We expand our language support by adding Chinese (Simplified) to Adaptive Planning.

Note: For details, see the Language Translations feature in the System functional area on the What's New in Workday Report.

Simplified Chinese Language Support

Release: 2022-09-10

We now support displaying all text in Chinese (Simplified) throughout Adaptive Planning.

Adaptive Planning - Miscellaneous Enhancements

User Experience for Managing User Profiles

Release: 2022-09-10

We improve how you manage user profiles in administration. On the Edit User page, when you select the Use Username as Email option, we now populate the username in the Email field and no longer enable you to edit it. To add an alternate email, you can select the second option that's next to the Email field.

When you add users using either the user interface or the createUser API, we automatically select the second option that's next to the Email field. You can then enter an alternate email in the field.

See [Create Users](#).

Download Search Cell Notes Results

Release: 2022-09-10

When you search cell notes on the Sheets Overview page, we display a new Download button that you can use to download the search results.

We only display the new button after you run your search. The download also only includes the data that we display in the search results.

Separate Session Timeouts

Release: 2022-09-10

We now enable Workday Adaptive Planning customers to manage the session timeout for their Adaptive Planning instances separately from Workday. This provides the flexibility to configure two individual session timeouts each for:

- Workday core applications
- Adaptive Planning applications

Note: You must contact your Named Support Contact to enable this functionality.

Attributes Support on Reports for Linked Accounts with Applied Dimensions

Release: 2022-09-10

We now enable you to report on the dimension attributes for linked general ledger and custom accounts with applied dimensions.

Dimensions Order on Cube Sheets

Release: 2022-09-10

For consistency, we now display your cube sheet dimensions in the order that you set them on the sheet builder on:

- Cube sheets.
- Cube sheets on dashboards.
- Printable view of cube sheets.

Initial Balance Columns on Cube Sheets

Release: 2022-09-10

We now prevent you from entering formulas on the initial balance columns of cube sheets. If any formulas already exist on initial balance columns on sheets, after you make a new change in the cell, we then prevent you from making additional changes in the cell.

If your cube sheet imports include formulas on the initial balance columns, we now:

- Enable the import to succeed when no other errors exist.
- Display a new error that instructs you to remove the formulas and use numbers instead.
- Don't import the initial balance columns.

Reset User Sync Mapping Between Workday and Adaptive Planning

Release: 2022-11-11

To maintain data integrity with user sync mapping, we deliver a new Reset User Sync Mapping with Adaptive Planning task (secured to the Security Administration domain).

You can use the task to clear the synced mapping for users in Workday. Then you can run these tasks to enable users to sign in to Adaptive Planning:

- Pre-sync: Sends user accounts from Adaptive Planning to Workday.
- Sync: Sends the Workday ID for each account from Workday to Adaptive Planning.

You can access those tasks from the Tenant Setup Report, Adaptive Planning tab, and then User Sync tab.

Note: This update is only available in Preview tenants. We don't plan to deliver this to Production tenants.

2022R1 Release Notes

2022R1 Service Pack Releases

Release: 2022-06-10

[Download Button on Modeled Sheets Toolbar](#)

Release: 2022-04-08

- [Adaptive Planning Sign-in Page](#)
- [Security APIs for Adaptive Planning](#)

Update and Append Structures for Imports

With 2022R1, we enable you to add new values and update existing account, level, and dimension structures with 1 import, saving you time and effort.

Watch the video: 2m 34s

Update and Append Account Structures

Release: 2022-03-12

We remove the Update option and the Append option when you import the account structure in the Accounts area of Modeling for these account types:

- Assumption.
- Custom.
- Cube: All types of accounts on cube sheets.
- General ledger.
- Metric.
- Modeled: All types of accounts on modeled sheets.

Instead, we deliver a new Update and Append option. When you use the new option, your import now includes all properties and metadata, such as multi-link accounts and account attributes. This enables you to add new accounts and update existing account settings with 1 import.

See [Import and Export Accounts](#).

Update and Append Level Structures

Release: 2022-03-12

We remove the Update option and the Append option when you import your level structure in the Level area of Modeling.

Instead, we deliver a new Update and Append option. When you use the new option, your import now includes all level properties and metadata, such as level attributes, enabling you to add new levels and update existing levels with 1 import.

See [Import and Export Levels](#).

Update and Append Custom Dimension Structures

Release: 2022-03-12

We remove the Update option and the Append option when you import your custom dimension structures in the Dimensions area of Modeling.

Instead, we deliver a new Update and Append option. When you use the new option, your import now includes all dimension and dimension value properties, such as dimension attributes. This enables you to add new dimension values and update existing values with 1 import.

See [Import Dimension Mappings](#).

Import and Export Availabilities in Sheets

We now enable you to import and export availabilities for quick updates to your cube and modeled sheets. You can also export a simple and scannable presentation of what's currently available on the sheet. This enables you to then make changes to the spreadsheet and import it.

Watch the video: 4m 19s

Cube Sheet Import and Export Availabilities

Release: 2022-03-12

In the Dimensions, Attributes and Levels section on the cube sheet building area in Modeling, we add new import and export links in the settings for the Level column and columns for accounts, attributes, and custom dimensions.

In each column type, we enable you to use a new template or your updated export to indicate the levels, accounts, or dimension and attribute values you want to appear on the sheet.

In the template for custom dimension values, we also enable you to confirm that you are deleting data when you remove custom dimension values.

See [Steps: Change Availabilities in Cube Sheets](#).

Modeled Sheet Import and Export Availabilities

Release: 2022-03-12

In the Columns and Levels section of the modeling sheet building area in Modeling, we provide new import and export links in the settings for the Level column and dimension columns.

In each column type, we enable you to use a new template for your updated export to indicate the levels or dimension values you want to appear on the sheet.

In the template for custom dimension values, we also enable you to indicate how to handle the data if you remove a dimension value from the sheet:

- Delete: Removes the data.
- Move to next available ancestor: Adds data to the rollup.
- Set to none: Adds the data to the uncategorized dimension value.

See [Change Availabilities in Modeled Sheets](#).

Sheet Availability API

Release: 2022-03-12

We deliver the new Sheet Availability JSON formatted REST API, enabling you to import and export sheet availabilities.

This new endpoint supports GET and POST, enabling query parameters for:

- sheetName
- columnName
- columnCode
- columnType
- instanceCode
- limit
- offset

See [Sheet Availability](#).

Adaptive Planning User Experience

We continue to align the Workday Adaptive Planning interface with Workday to provide a more consistent user experience. We update the layout of the matrix report viewer and dashboard overview. We also make Adaptive Planning easier to use by delivering several accessibility improvements to the matrix report viewer.

Watch the video: 4 min 30 s

Dashboards Overview

Release: 2022-03-12

We update the overview page for dashboards by providing a new:

- Action to **Open Checked Out Copy** from shared perspectives and **Open Shared Copy** from personal perspectives.
- Action to **Open Live Perspective** from snapshots and schedules.
- Created By column update enabling you to click on names to send emails.
- Navigation section enabling you to add new perspectives and access personal and shared perspective folders. We also enable you to collapse or expand the navigation section.
- Search field enabling you to find items based on file name.
- Status column that indicates if a perspective is locked or checked out.

We also:

- Add toast confirmation messages for actions like deleting, creating, and saving.
- Move the Snapshot Schedule in the perspective menu for easier access.
- Redesign the dialogue for Share Perspectives.

Also, when you check out a perspective from the Shared folder, the Personal folder now opens with the checked out version.

Note: To disable the new dashboards overview user interface, you must deselect the **Dashboards Overview** check box on the Visual Preferences page in Administration.

See [Concept: Dashboards](#).

Dashboards Viewer

Release: 2022-03-12

To improve the user experience, we redesign the viewer page for dashboards by providing new:

- Chart drill down updates that include a title for each chart and layout improvements.
- Looks for icons, hover text, dialogue boxes, and dashboard tabs.

Settings of the Consolidation Percentages Sheet

Release: 2022-03-12

In the Settings of the Consolidation Percentages Sheets in Modeling, we rename these fields:

- System Account to Minority Interest Account.
- Net Income Account to General Ledger Account.

We also update the tooltips to clarify the purpose of the fields.

See [Choose Consolidation Methods](#).

Matrix Reports

Release: 2022-03-12

To provide a more seamless user experience, we update matrix reports in Adaptive Planning by:

- Adding a new contextual menu that enables you to drill down and add notes.
- Delivering a new toolbar that combines all relevant options and actions.
- Enabling you to refresh the report without going back to the overview page.
- Providing support for multiple report parameters that appear within the report viewer context, instead of on a separate page.
- Removing the top panel and instead delivering an information panel on the right of the report.

Note: When you access matrix reports using Internet Explorer 11, we continue to display the old user interface even if you enable the latest user interface updates for Matrix Report Viewer from Visual Preferences. Microsoft plans to retire Internet Explorer 11 in June 2022.

See [Concept: Matrix Reports](#).

Accessibility

Release: 2022-03-12

We improve accessibility to help comply with the Web Content Accessibility Guidelines 2.1.

For assistive technology support with screen readers and magnifiers, we deliver:

- High-contrast color.
- Keyboard shortcuts.
- Screen navigation with logical tabbing and alt text for images.

On high-use pages, we deliver a:

- Matrix Report Viewer
- Dashboard Overview
- Dashboard Viewer
- Workflow

We also add new keyboard shortcuts to the Matrix Report Viewer to provide accessible navigation.

Note: The new dashboard viewer doesn't support the accessibility improvements in scorecards, sheets, dimension mappings, and crosstabs.

See [Reference: Accessibility in Adaptive Planning](#).

Remember Locations for Web Reports

Release: 2022-03-12

We now remember your locations when you navigate across the reports overview and reports pages. This includes:

- After you navigate to the Home page and then click the browser Back button.
- After you perform a search.
- The folder where you accessed the report.
- The paginated page you were on.

When you first sign in to reports, we automatically select the Favorites folder. Then, we select the report folder that you were last in.

Delay the New Interface Changes by Feature

Release: 2022-03-12

For convenience, we now enable you to delay the latest user interface changes by feature until the next release. This enables you to complete important business tasks in a familiar setting.

We deliver a new Apply Latest User Interface Updates check box on the Visual Preferences page in your general settings. We automatically select the new check box to enable these new features:

- Dashboard Overview
- Matrix Reports Viewer
- Workflow

When you deselect the new check box to delay a feature until the next release, we revert the user interface to the state prior to the current release.

See [Change Visual Preferences](#).

Workflow Page

Release: 2022-03-12

We update the Workflow page by:

- Delivering a new navigation section, enabling you to access either your levels or your sheets.
- Redesigning the user interface of the table that displays the levels, including new icons for every Workflow status.
- Removing the Search tab. Instead, we now display the search results in the levels and sheets table area when you use the search bar.

Depending on if you select a level or sheet, we rename the Details panel to either:

- Level Workflow Status
- Sheet Workflow Status

We also:

- Display links to email users on the Last Updated By column.
- Display toast messages to confirm if your action was completed when you try to save, submit, approve, reject, or reset a note.
- Provide a new look to the Level Workflow Status or Sheet Workflow Status panel, such as moving the Last Updated By field to the top. We also now display the panel only after you select a level or sheet.

Note: To disable the new Workflow user interface, you must deselect the Workflow check box on the Visual Preferences page in Administration.

Process Guide

Release: 2022-03-12

With this update, we redesign the user interface of the task section in your Process Guide for reports, dashboard, workflow, and perspective task types. We also add:

- More minimalistic Description and Notes tabs.
- Rounded buttons on all dialogs.

Easier Source Sheet Selection for Merged Cube Sheets

Release: 2022-03-12

We deliver new check boxes that you can use to select source sheets in the Settings on merged cube sheets.

Dimension Mapping Tables on Dashboards

Release: 2022-03-12

We improve the navigation and context for dimension mapping tables on dashboards by now:

- Paginating dimension mapping tables. Each page contains 50 rows.
- Opening the last page when you create a row.
- Taking you to the first page when there are errors.
- Displaying an error message when you encounter an error.

Remove What's New Carousel Page

Release: 2022-03-12

We now remove the What's New page in Adaptive Planning. We also no longer show the What's New page as the initial page after a new release.

We also remove the:

- Option to set the What's New page as a Home page. If the What's New page is set as your Home page, we automatically change your Home page to now display the Welcome page.
- What's New option from the main navigation menu in Support tab.

Instead, you can access What's New documentation in the Workday Adaptive Planning Help Center.

Adaptive Planning Sign-in Page

Release: 2022-04-08

To improve the user experience, we redesign the Workday Adaptive Planning sign-in page by providing:

- A new simplified layout.
- New field and button names.

We also remove customer service and support numbers. We recommend you use the Workday Customer Center for customer service and support.

Adaptive Planning - Miscellaneous Enhancements

customReportValues API Supports Calculation Elements

Release: 2022-03-12

We now support matrix report calculation elements in the customReportValues API. This enables you to build report-specific calculations based on column or row references to provide subtotals, variance, or other calculations.

See [customReportValues](#).

Easier to Read Access Rule Exports

Release: 2022-03-12

We add new alternating color indicators in access rule exports, making them easier to read.

Cookie Status

Release: 2022-03-12

Workday updates the default cookie status to secure SameSite=strict across the platform to help reduce cross-site cookie attacks. This change might affect custom iFrame integrations and embedded Salesforce integrations.

Note: For Salesforce integrations, we recommend that you refer to Salesforce documentation for custom tab considerations.

Master Formula Changes to Default Formula

Release: 2022-03-12

With this update, we rename the Master Formula label in account settings to Default Formula.

Download Button on Modeled Sheets Toolbar

Release: 2022-06-10

When you download a modeled sheet from its toolbar, you can now select from a new prompt to either directly download the sheet or have Workday display a printable view. We no longer enable you to automatically download a sheet by clicking the Download button in its toolbar.

OfficeConnect Availability for Financial Management

Workday introduces OfficeConnect availability for Workday Financial Management, enabling accounting, finance, and report writers to create reports with Workday data in Excel. You can use the OfficeConnect Excel Add-in to simplify how you perform ad hoc financial analysis and create financial-related reports on journal lines. With OfficeConnect you can connect directly to Workday, leveraging application security, dimensionality, and business rules such as consolidations and currency translations. Prism Analytics users can also enable additional capabilities.

You must meet certain requirements to use this feature.

Watch the video: 3 min 30 s

Enable OfficeConnect for Workday Financial Management

Release: 2022-03-12

We now enable you to set up an OfficeConnect connection to Workday Financial Management on the OfficeConnect tab of the Tenant Setup – Financials task. This generates the API client ID and URLs that you can use to create a tenant connection to the Financials data source.

When report users log in to OfficeConnect, they can select this connection to generate financial reports.

OfficeConnect Financial Data Source

Release: 2022-03-12

We deliver a new Access Workday Financials OfficeConnect domain in the System functional area, enabling you to configure permissions for Financials in OfficeConnect configuration. When you sign in to a Workday tenant from OfficeConnect, we also now enable you to select from the Financials data source.

Selecting a data source ensures that you use the correct data model for generating reports.

Set Up Financial Reporting Data Model

Release: 2022-03-12

We deliver a new Set Up Financial Reporting and Analytics Data Model task (secured to the new Set Up: Financial Reporting and Analytics Data Model domain) that you can use to define the financial reporting data model for OfficeConnect. When you complete this task, Workday prepares the Financials data source in OfficeConnect with your financials data according to configured dimensions.

The financial reporting data model:

- Is a curated subset of elements selected from the Workday Financial data model (FDM).
- Determines which information from the FDM, such as which company hierarchies, ledger account hierarchies, and dimensions, is available for analyzing and reporting on in OfficeConnect.

Tenant Name in OfficeConnect Reporting Pane

Release: 2022-03-12

We now display the data source in the Reporting task pane in OfficeConnect for both Adaptive Planning and Financial Management.

Also, in OfficeConnect for Financial Management only, we prefix the data model name with the description from the Manage Tenants dialog.

This clarifies the data source and what data model they're using in OfficeConnect.

See [Concept: OfficeConnect for Excel Interface Tour](#).

Administrator Guide Links

See:

- [Enable OfficeConnect for Workday Financial Management](#)
- [Concept: Reporting on the Financial Modeled Data Source](#)
- [Concept: The Financial Reporting Data Model](#)

OfficeConnect and Excel Interface for Planning Installations

We now include the Microsoft Edge web browser in the OfficeConnect and Excel Interface for Planning installations.

This web browser replaces Internet Explorer which Microsoft plans to retire in the near future.

New Web Browser for Login

Release: 2022-03-12

In preparation for Microsoft's plans to retire Internet Explorer, both OfficeConnect and EIP add-ins now transition to Microsoft Edge. The new web browser requires:

- WebView2 Runtime
- .Net 4.8

If you haven't already installed the new web browser requirements, you must have administrator permissions to upgrade to the latest version of the add-ins.

See [Reference: OfficeConnect Technical Requirements](#).

Level, Dimension, and Attribute Codes for Display Names

We continue to enhance level, dimension, and attribute codes for display names. We enable attribute tagging in APIs and Excel imports by attribute code and attribute name. We also support duplicate labels in older OfficeConnect reports.

Watch the video: 3m 44s

Attribute Tagging for Bulk APIs

Release: 2022-03-12

We now enable attribute tagging using both attribute code and name in API v32 for:

- exportAccounts responses.
- exportDimensions responses.
- exportLevels responses.
- updateAccounts requests and responses.
- updateLevels requests and responses.
- updateDimensions requests and responses.

See [API Changes by Release](#), [updateAccounts](#), [updateDimensions](#), [updateLevels](#), [exportAccounts](#), [exportDimensions](#),

Attribute Tagging for Excel Dimension Structure Imports

Release: 2022-03-12

We now enable attribute tagging for dimension Excel structure imports. We also now include columns in import templates for attribute code and attribute name.

See [Concept: Level, Dimension, and Attribute Codes for Display Names, Import Metadata Using Name and Code](#)

OfficeConnect Report Labels Support Display Names

Release: 2022-03-12

For all OfficeConnect report elements, we now provide the Display Name label type value in label definitions. This supports duplicate metadata names in Adaptive Planning.

Note: You can now use display names for instances that you enable for Excel Interface for Planning and for instances that include a modeled sheet that you set up to define anomaly thresholds.

Before enabling display names, you must submit all pending changes in saved workbooks. This ensures that you don't get a warning for each duplicate pending change.

See:

- [Concept: Level, Dimension, and Attribute Codes for Display Names](#)
- [Steps: Add Report Labels](#).

Display Names Automatically Available to All Adaptive Planning Customers

Release: 2022-03-12

We automatically enable Level, Dimension, and Attribute codes for Display Names for all Adaptive Planning customers.

Note: Anomaly detection thresholds in sheets will continue to function if you enter level codes instead of level names.

Level, Dimension, and Attribute Codes in Import Templates

Release: 2022-03-12

Import template formats and instructions within Integration > Import Data now indicate the need for codes as unique identifiers in imports for:

- Standard Data Import
- Cube Sheet Data Import
- Modeled Sheet Data Import
- Transaction Data Import

Any dimension columns split into 2 columns:

- Dimension Code
- Dimension Name

To automatically create new dimension values at import for a dimension, the Dimension Code and Dimension Name columns must be populated for the dimension value.

Levels column headers now indicate:

- Level Code

Accounts column headers now supports either of these as the label:

- Account Code
- Account

Note: Download new templates and follow the instructions in the first sheet. Templates downloaded before March 2022 may not work.

See [Spreadsheet Import](#), [Reference: Settings for Levels](#), [Create Attributes](#).

Check Box and Toggle Columns on Modeled Sheets

With 2022R1, we enable you to use check box and toggle columns on modeled sheets and in Excel Interface for Planning without having to purchase Sales Planning. We also improve how you use the columns in Excel Interface for Planning and data imports by only enabling you to enter 0 or 1, streamlining data entry and processing.

Check Box and Toggle Columns in Excel Interface for Planning without Sales Planning

Release: 2022-03-12

We now enable you to use check box and toggle columns in Excel Interface for Planning without having to purchase Sales Planning. When you add a Checkbox data entry column in Model Administration and configure it, we display the column on your Excel Interface for Planning sheet after you load the sheet.

Check Box Data Entry Column in Model Builder and Modeled Sheets without Sales Planning

Release: 2022-03-12

We now enable you to add a Checkbox data entry column on your modeled sheets without having to purchase Sales Planning. When you add a Checkbox data entry column in Model Administration and configure it, we display the column on your modeled sheet.

This enables you to enforce consistent values and create more dynamic models that drive calculations on whether or not you select the check box.

Example: You can create a formula where if(checkbox.column=1, use one calculation, and if checkbox.column=0, use another calculation). This enables the model to present different values on row details based on whether or not you select the check box.

See [Add Check Box Columns to Modeled Sheets](#).

Check Box and Toggle Columns in Excel Interface for Planning

Release: 2022-03-12

You can now only enter a 0 or 1 in check box and toggle columns on your Excel Interface for Planning sheets. You can either leave the cell blank or enter:

- 0 for off.
- 1 for on.

This enables you to enforce consistent values and create more dynamic models that drive calculations on whether or not you select this check box. Example: You can create a formula where if(checkbox.column=1, use one calculation, and if checkbox.column=0, use another calculation). This enables the model to present different values on row details based on whether or not you select the check box.

We don't automatically change any existing check box and toggle column values on your Excel Interface for Planning sheets. We continue to display your modeled reports whether or not your check box and toggle column values follow this new restriction.

Upload Modeled Sheets with Check Box and Toggle Columns

Release: 2022-03-12

When you upload modeled sheets in Model Administration, you can now only upload a 0 or 1 in check box and toggle columns. You can either leave the cell blank or upload:

- 0 for off.
- 1 for on.

This enables you to create enforce consistent values and more dynamic models that drive calculations on whether or not you select this check box. Example: You can create a formula where `if(checkbox.column=1, use one calculation, and if checkbox.column=0, use another calculation)`. This enables the model to present different values on row details based on whether or not you select the check box.

We don't automatically change any existing check box and toggle column values on your modeled sheets. We continue to display your modeled reports whether or not your check box and toggle column values follow this new restriction.

See [Spreadsheet Import](#).

Cell Explorer in Cube Sheets

With this release, we improve Explore Cell functionality in cube sheets. When you click a link in Cell Explorer to adjust data that's visible in another sheet, we now filter the target sheet by the same dimension you select on the first sheet, improving efficiency. We also now support Dimension values for enhanced flexibility.

Links to Cube Sheets from Explore Cell

Release: 2022-03-12

When you click on a cube sheet link from Cell Explorer to adjust data that's visible on that other sheet, we now automatically filter the target cube sheet by the same dimensions that you select on the first cube sheet.

We only automatically filter on the target cube sheet for all dimensions that the source and target sheets share. When the target cube sheet includes dimensions or dimension attributes that don't exist on the source sheet, we automatically select All on those dimension and dimension attribute filters.

Hide and Unhide Columns on Modeled Sheets

With this release, we enable you to hide or unhide columns on modeled sheets, making it faster and easier to find what you need.

Download Drop-Down Menu on Modeled Sheets

Release: 2022-03-12

We add a new Download drop-down menu on your modeled sheets toolbar, enabling you to download either:

- The printable view of your modeled sheet, which excludes all hidden values and respects your current view state, or
- Your modeled sheet and include all hidden values and codes.

See [Reference: Sheet Toolbar](#).

Copy and Paste for Hidden Columns

Release: 2022-03-12

When you copy a row on modeled sheets and the row contains hidden columns, we now include the hidden column values when you paste the row.

We continue to skip hidden values when you copy and paste a range.

See [Reference: Copy and Paste](#).

Hide Columns Section in Display Options of Modeled Sheets and Sheets on Dashboards

Release: 2022-03-12

We add a new Hide Columns section on the Display Options menu in modeled sheets, enabling sheets users to select which columns to hide. You can deselect the Hide Column check box for columns on a modeled sheet to prevent sheet users from hiding the columns.

Also, we display carat icons with tooltips in the column headers to indicate hidden columns.

We also display the new Hide Columns section, carat icons, and tooltips in sheets on dashboards.

When you hide columns on sheets or sheets on dashboards:

- We still enable you to filter the columns.
- We don't include any hidden column values when you copy and paste a data range or copy rows.
- If they're split columns and you copy the columns, we don't copy over the values from the hidden columns.
- We now restrict you from splitting an entire row when you hide all splittable columns.

See [Change Modeled Sheet View](#).

Allow users to hide columns in Display Options Check Box in Model Management

Release: 2022-03-12

We add a new Allow Users to Hide Columns in Display Options check box that you can use for these column types on your modeled sheets in Model Management:

- All Attributes.
- All Dimensions.
- All Display Columns.
- Only the following Data Entry Columns: Text, Number, Date, Initial Balance, and Checkbox.

This enables your sheets users to hide or unhide the columns when they view the modeled sheets.

You can't enable users to hide these column types:

- Level.
- Text Selector.
- Timespan.

You can only select the new check box when you deselect the Required Column check box. You can enable users to hide columns even if you also select the Read Only check box.

See [Steps: Build Modeled Sheets](#).

Hidden Columns on Dashboard Sheets

Release: 2022-03-12

We now enable you to configure a dashboards perspective with hidden columns, making it automatically display for all users you share the perspective with. Your users can still change their view state as well as hide or unhide columns.

Note: When you click the Reset to Default option, we revert the perspective back to the admin-set view state, which may contain hidden columns.

Filter Display Columns on Modeled Sheets

We enable you to filter modeled sheet rows using calculated account display columns for calculated accounts, making it faster and easier to find what you need.

Filter Calculated Account Display Columns

Release: 2022-03-12

We now enable you to filter rows using calculated account display columns on:

- The Display Options of your modeled sheets.

- Excel Interface for Planning sheets.

Workforce Planning Actions for Job Requisitions and Positions

We continue to streamline how you make changes to your workforce in HCM from an approved workforce plan in Adaptive Planning. If you use a job management staffing model or timespan to plan for new positions, you can now create job requisitions and positions in HCM when you publish your workforce plan.

Mappings for Create Job Requisition and Create Position

Release: 2022-03-12

We improve the mappings for the Create Job Requisitions and Create Positions tasks to include new mapping choices for the Number of Positions and Date fields.

For the Number of Positions field, you can map:

- Single Position when the headcount modeled sheet rows are configured to position-level details.
- Timespan to specify any whole number from 1 to 100 when the modeled sheet is configured with a Timespan.

For the Date Field, you can map:

- Timespan (Period Start Date).
- All date columns.

See [Publish Workforce Planning Actions from Adaptive Planning](#).

Recruiting Start Date for Create Job Requisition

Release: 2022-03-12

When you map fields for publishing with the Create Job Requisition task, we now require you to add a recruiting start date.

Note: If you don't enter a recruiting start date in Adaptive Planning, we use the date when it's published.

See [Publish Workforce Planning Actions from Adaptive Planning](#).

Number of Positions Column on View Publish Page

Release: 2022-03-12

We add a new Number of Positions column on the View Publish page, enabling you to view the number of positions that you create during the publish.

See [Concept: Publish Plans from Adaptive Planning](#).

Publish to Create Job Requisitions and Positions

Release: 2022-03-12

We now enable you to publish from a modeled sheet or the Publish page in Adaptive Planning to create job requisitions and positions when you create:

- Job requisitions using the job management staffing model and timespan, and plan for multiple openings per modeled sheet row.
- Job requisitions using the position management staffing model and timespan, and plan for 1 opening per modeled sheet row.
- Positions using the position management staffing model and timespan, and plan for multiple positions per modeled sheet row.
- Positions using the position management staffing model and timespan, and plan for 1 position per modeled sheet row.

Note: To create job requisitions, we only support expediting without review and require final submission through the Inbox item.

See [Publish Workforce Planning Actions from Adaptive Planning](#).

Number Columns on Review Workforce Planning Actions

Release: 2022-03-12

We add a new Number of Positions column in the Create Position section on the Review Workforce Planning Actions task, enabling you to view the number of planned positions that you can review and create.

We also add a new Number of Openings column in the Create Job Requisition section on the task, enabling you to view the number of planned job requisition openings that you can review and create.

See [Review Workforce Planning Actions](#).

Optimize Dashboard Loading

With this release we prompt to select a level filter and progressively load content in the viewable range to optimize dashboard loading.

Smart Dashboard Loading

Release: 2022-03-12

We now load dashboard content in the viewable range as you scroll. This helps to optimize performance by only loading the data you need.

Level Prompt

Release: 2022-03-12

We now display a warning when you don't select a perspective level filter. This helps to optimize load time and narrows the focus on your data.

We continue to automatically save your level filter selections in your browser.

API to Export Configurable Model Data

We update the `exportConfigurableModelData` API to now stream data for larger and more performant exports from modeled sheets.

Stream Data from Modeled Sheets

Release: 2022-02-04

We update the `exportConfigurableModelData` API to now stream data from modeled sheets. This enables:

- Increased export speed.
- Reduced restraints on the numbers of cells and rows for export.

To use this functionality, you must update your API to v32. If you don't want streamed data from `exportConfigurableModelData`, you can continue to use v31 or lower.

See [exportConfigurableModelData](#).

NetSuite Basic Endpoint Upgrade

We upgrade all NetSuite Basic customers to the NetSuite 2021.1 endpoint. This ensures continuity of NetSuite support.

NetSuite Basic

Release: 2022-03-12

We automatically upgrade all NetSuite Basic customers to the new NetSuite 2021.1 endpoint.

We also remove these unsupported NetSuite Basic setup fields:

- NetSuite Basic Legacy SSO Login.
- System Type.

See [Steps: Set Up NetSuite Basic Integration](#).

Access NetSuite File Cabinet Data

You can now access your NetSuite File Cabinet CSV files in NetSuite data sources in Workday Adaptive Planning Integrations. This simplifies the process of bringing data from your File Cabinet into tables in your NetSuite data sources.

Watch the video: 1 min 47 s

Manage File Cabinet

Release: 2022-03-12

You can now click Manage File Cabinet in the Actions pane of NetSuite data sources. This enables you to configure which files you pull in as data source tables, similar to our NetSuite Saved Searches interface. We provide File Cabinet configuration options to:

- Name
- Add
- Update
- Delete

Note: Manage File Cabinet only supports CSV files from your NetSuite File Cabinet.

See [Steps: Set Up NetSuite Data Sources, Select NetSuite File Cabinet Files for Import](#).

Publish From Metadata Mappings

We now enable publishing plans from only the metadata mappings and ignoring data mappings. This helps you prevent duplicate or invalid data mappings since metadata mappings point to unique Workday WID values.

Metadata Mappings in Workday External Systems

Release: 2022-03-12

You can enable a new Metadata Mappings Only option in the Workday External Systems in Adaptive Planning. This option:

- Prevents using mappings from Actuals in planning data loaders for publishing.
- Publishes using only the metadata mappings from metadata loaders.

Note: We don't automatically apply this change to your existing Workday External Systems, but you can update them to use metadata mappings only.

See [Set Up Workday External Systems for Adaptive Planning](#).

Report Partitioning in Workday Data Sources

You can now partition data retrieved from Workday reports in the Workday Data Sources in Adaptive Planning integrations. This saves you time and eliminates the need to manually join tables from multiple Workday reports.

Partition By Prompt Values and Default Partition Size

Release: 2022-03-12

When you select a report in Manage Reports, we enable these new fields:

- **Partition By:** For selecting Workday report prompt parameters to break up data from Workday reports.
- **Default Partition Size:** For selecting how many report prompt parameters to include in a partition.

Multi-instance objects populate 100 as the default partition size, which you can change. Single-instance objects or self-referencing objects populate 1 as the default partition size.

See [Select Workday Reports in Workday Data Sources for Adaptive Planning](#).

Targeted Publishing

We now enable you to publish a subset of a plan's periods, improving the user experience and increasing publishing performance.

Publish by Period Range for Financial Plans

Release: 2022-03-12

You can now select the Publish by Period Range option when publishing a financial plan, instead of publishing all of the plan's time periods. When you select the option, you can also use these options on the Publish Plans page:

- **From:** The starting period for your publish.
- **To:** The ending period for your publish.

Note: You must select contiguous time periods to use this functionality.

See [Concept: Publish Plans from Adaptive Planning](#)

Adaptive Data Agent for Virtual Clean Room

The Adaptive Planning Data Agent now supports installation in Virtual Clean Rooms.

Adaptive Planning Data Agent in Virtual Clean Rooms

Release: 2022-03-12

You can now install the Adaptive Planning Data Agent using Virtual Clean Rooms.

Adaptive Planning Performance and Scalability

We now deliver performance and scalability improvements that enable you to model your business without compromising ease of use.

Support for 900 Concurrent Users

Release: 2022-03-12

We now enable up to 900 users to perform view and edit actions at the same time when:

- A single user view and edit action takes less than 5 seconds.
- Less than 20% of the concurrent users perform edit actions at the same time.
- You exclude administrative actions that involve massive changes to the data model.

Note: You must contact your Named Support Contact to enable this functionality.

Security APIs for Adaptive Planning

We deliver new security APIs that you can use to set up custom integrations. This reduces the need for manual effort, saving you time.

Note: You must contact your Named Support Contact to submit a request to enable this feature. Currently this feature is only available to customers with over 100 users.

Permission Set REST API

Release: 2022-04-08

We deliver a new Permission Set REST API endpoint. When you set up instance assignments, you can use the new endpoint to quickly assign Adaptive Planning permission sets to users.

See [Permission Sets](#).

Multiple Instance User Access REST API

Release: 2022-04-08

We deliver a new Multi-Instance User Access REST API endpoint. When you link multiple Adaptive Planning instances, you can use the new endpoint to assign a user to multiple instances and designate the default instance.

See [Instances](#).

importGroups API

Release: 2022-04-08

We deliver a new importGroups API that you can use to import Workday security groups and their associated users into Adaptive Planning. You can also use the new API to import user groups from external sources.

This enables you to use external user groups in planning security contexts, such as in processes, access rules, and version access.

See [importGroups](#).

View External User Groups

Release: 2022-04-08

For convenience, you can now view external user groups, such as Workday security groups, in the Global User Groups section on the Administration page.

Note: You can't edit external user groups on the tab. We recommend that you use the new importGroups API to update external user groups instead.

See [Create User Groups](#)

Discovery Classic Retirement

We now retire Discovery Classic. We recommend that you use Workday Adaptive Planning Dashboards instead.

Retiring Discovery Classic

Release: 2022-03-31

We retire all discovery classic features on 2022-03-31.

2021R2 Release Notes

2021R2 Service Pack Releases

Release: 2022-02-11

[Adaptive Planning Support and Feedback](#)

Release: 2021-12-10

- [New Explore Cell Functionality Available for Consolidation](#)

Release: 2021-11-12

- [Level, Dimension, and Attribute Codes for Display Names](#)
- [Merged Cube Sheets](#)
- [OfficeConnect System Variable Label Change](#)
- [OfficeConnect and EIP Login Page Change for License Agreement](#)
- [View Modeled Sheet Required Columns in EIP](#)

Release: 2021-10-15

- [Improved User Interface for Explore Cell](#)
- [Level, Dimension, and Attribute Codes for Display Names](#)
- [Download and Upload Mappings for Metadata Loaders](#)
- [Levels on Cube Sheet Data Imports](#)

Release: 2021-10-08

- [Plan Publishing](#)

Workforce Planning Actions for Job Requisitions

We continue to streamline your ability to make changes to your workforce in HCM from an approved workforce plan in Adaptive Planning. You can now create job requisitions in HCM when you publish your workforce plan.

Import Workforce Planning Actions Web Service

Release: 2021-09-11

Workday updates the Import Workforce Planning Actions web service to now support creating job requisitions directly in HCM.

We automatically use the web service when you publish your workforce plans.

Job Requisition Report Fields

Release: 2021-09-11

You can now use these report fields on routing rules, condition rules, and custom reports in the Job Requisition business process:

- [Plan Version ID for Adaptive Planning Integration](#)
- [Publish Row ID](#)

Edit Tenant Setup - HCM

Release: 2021-09-11

We deliver a new Route Create Job Requisition Events setting on the Edit Tenant Setup – HCM task that you can use to select security groups for routing Create Job Requisition events that are initiated from Adaptive Planning.

You can only select security groups or roles that have a Supervisory Organization role usage. You can't select unconstrained role-based security groups.

Create Job Requisition Workforce Action in Adaptive Planning

Release: 2021-09-11

We deliver a new Create Job Requisition workforce action that you can use when you publish from a modeled sheet in Adaptive Planning. Each job requisition row that you publish from your modeled sheet creates a job requisition in HCM.

Note: This functionality only supports expediting without review, and requires final submission through the Inbox item.

Adaptive Planning Level Ownership

We improve security by consolidating where we display level owners and where you can assign level owners.

Level Owners on the Levels Page

Release: 2021-09-11

On the Levels page in Model Management, we remove the:

- Export Level Owners button on the main toolbar.
- Level Owners column on the level tree.
- Level Owners field on the Level Details section.

To view or change level ownership, you can continue to access level ownership on these pages in Administration:

- Associations
- Users

Level Owners Column on Level Structure Imports and Printable View

Release: 2021-09-11

We remove the Level Ownership column from the spreadsheet that you use to import level structures.

We also no longer display the Level Ownership column when you download a printable view.

Workforce Planning Actions for Positions

We continue to streamline your ability to make changes to your workforce in HCM from an approved workforce plan in Adaptive Planning. Now, we reduce the amount of manual effort by enabling you to use Org Studio to create many positions from 1 line.

Import Workforce Planning Actions Web Service

Release: 2021-09-11

We update the Import Workforce Planning Actions web service so that when you publish your workforce plan, we now support:

- Creating a new org design.
- Indicating the period start date for each of the distinct positions created in a plan period.

We automatically use the web service when you publish your workforce plans.

Improved User Interface for Explore Cell

Note: We reverted this feature from Preview and Production tenants on 2021-9-15 due to technical issues. We reinstate it on 2021-10-14.

We continue to improve Explore Cell functionality to provide a better user experience. We now enable you to hide irrelevant rows, enhancing usability. Also, you can now set the maximum number of contributing rows to display in cell explorer, providing better visibility into your data.

Opt Out of the New Interface for Explore Cell

Release: 2021-10-14

For convenience, we now enable you to opt out of the latest Explore Cell user interface changes and functionality until the next release. This enables you to complete important business tasks in a familiar setting.

We provide a new Apply Latest User Interface Updates to Explore Cell check box on the Visual Preferences page in general settings. We automatically enable the setting so that you can use the newest updates before making your decision. When you disable the setting, we revert the user interface and functionality of Explore Cell to the state prior to the current release.

Suppress Zeros and Blanks

Release: 2021-10-14

We now automatically suppress rows with zeros or blanks every time you launch Explore Cell for data driven by contributing details. This simplifies your view, enabling you to see only details from levels, dimensions, accounts, and attributes that actually contribute to the value you're exploring.

We also provide this new check box on the bottom-left corner of the Explore Cell window: Suppress Rows when all Zeros or Blanks. This enables you to display rows with zeros and blanks.

See [Concept: Explore Cell and Row Details](#).

User Interface Changes to Explore Cell

Release: 2021-10-14

To make it easier to find information, we move these details to the upper-left section in the Explore Cell window:

- Cell value.
- Links to audit trail and drill capabilities.
- Links to sheets that show the value.

Also, we move these details to the upper-right section in the Explore Cell window:

- Details about the account, level, time period.
- Arrows to click to the previous and next time period.

You can still find contributing details in the bottom of the window, such as source accounts, formulas, and sources of contributing values.

We now enable you to hover over the formula references to view the value or the value to view the formula reference.

See [Concept: Explore Cell and Row Details](#).

Set the Maximum Number of Contributing Rows

Release: 2021-10-14

We deliver a new Cell Explorer Contributing Rows Limit setting on the General Setup page, enabling you to set the maximum number of rows to display in Explore Cell. We automatically set the maximum to 2,000.

Note: If you revert the Explore Cell user interface, the Modeled Sheet First Page Size setting on the General Setup page continues to control Explore Cell maximum rows.

See [Reference: General Setup](#).

New Explore Cell Functionality Available for Consolidation

Release: 2021-12-10

You can now use the improved user interface and Explore Cell functionality in all tenants, including those with consolidation for values that have components like:

- Audit trail for journal entries.
- Consolidation ownership percentages.
- CTA accounts.
- Elimination rules.
- Journal entries.
- Minority interest.

You can also now suppress zeros for minority interest pages in cell explorer.

Change and Save Standard Sheet View

With this release, we automatically enable you to save more view options in sheets. This eliminates the need to change your view each time you open a sheet. You no longer must contact support to enable this capability.

View by Account or Level in Minimized View

Release: 2021-09-11

For convenience, in the minimized view on dashboards, you can now select to view by either:

- Account.
- Level.

Save Changes in Sheets and Dashboards

Release: 2021-09-11

We now enable you to save your sheet when you switch between the account and level views in:

- Maximized standard sheets on dashboards.
- Minimized standard sheets on dashboards.
- Standard sheets in the Sheets area.

In standard sheets, you can also now save changes that you make to:

- A pinned account or level.
- Your View By mode. We save your selection as your preferred view.

For convenience, we also persist your preferred view when you:

- Refresh or return to the page.
- Switch between the minimized and maximized views.

See [Change Standard Sheet View](#).

Required Columns on Modeled Sheets

We now automatically deliver the ability to use required columns in modeled sheets. You no longer need to request this functionality.

Note: You can't use this feature when you use the Excel Interface for Planning (EIP) functionality.

Required Columns Setting

Release: 2021-09-11

We deliver a new Required Column check box in all custom dimension column settings on the modeled sheet administration page.

See [Steps: Build Modeled Sheets](#).

Required Column Indicator in Modeled Sheets

Release: 2021-09-11

To make it easier to identify required columns, we now:

- Display a red asterisk in the header of required columns.
- Highlight the cell when it's missing data.

See [Reference: Colors and Notations in Sheets](#).

Modeled Sheet Data Import Required Columns

Release: 2021-09-11

When you mark a column as required, we now display the column in the mandatory columns section on the import file.

View Modeled Sheet Required Columns in EIP

Release: 2021-11-12

We now enable Excel Interface for Planning (EIP) users to view required columns in modeled sheets on both desktop and EIP. We also now display an asterisk in required columns on both desktop and EIP. This enables sheet viewers to know where they must enter data before saving the sheet.

When a user doesn't populate a required column, we display an error and navigate them to the specific column.

Calculated Accounts for Adaptive Planning

We continue to increase the flexibility of calculated accounts to help you preserve historical data when you add default formulas.

Watch the video: 4m 7s

Preserve Data When Adding Account Formulas

Release: 2021-09-11

We now enable you to preserve historical data when you add default formulas to general ledger and custom accounts. When you save new formulas, we provide a message that reminds you to click 1 of these options:

- Preserve, which creates data entry overrides for all existing versions, saving existing data, and also uses the default formula for all new versions. You can click None from the Override Formula Setting prompt to apply the formula to any existing version.
- Replace, which replaces all existing data, including data in locked versions, with the formula calculation.

See [Add or Change Account Formulas and Overrides](#).

Cube Sheet Performance

With 2021R2, we improve cube sheet performance by enabling you to hide rollup totals. We also enhance the performance of viewing and downloading printable cube sheets.

Hide Cube Sheet Rollup Totals

Release: 2021-09-11

We provide a new check box on the Settings tab in sheets properties, enabling you to hide rollup totals if rows or columns are hidden with display options or on the sheet definition. This decreases the time it takes to load the sheet.

We automatically enable the check box for new cube sheets. We don't automatically enable it for existing cube sheets.

Note: Since row and column totals are hidden when you enable the check box, you can't use break back or explore cell options in the total row or column.

See [Reference: Settings for Cube Sheets](#).

Export Performance for Cube Sheets

Release: 2021-09-11

We improve the export function of cube sheets by decreasing the time it takes to download the data.

Data in Sheets

We improve your interaction with data in sheets, enabling you to enter and analyze data more intuitively.

Limited Breakback Options

Release: 2021-09-11

We now only display the Proportionally breakback option when you suppress zeros and blanks on sheets. This helps to prevent unexpected data from populating into cells.

Remove Total Rows for Account Groups in Cube Sheet

Release: 2021-09-11

We remove the rows that display totals of account groups in cube sheets from all sheet display configurations.

Adaptive Planning User Experience

We continue to align the Workday Adaptive Planning interface with Workday. We update the layout of the Explore Cell window, sheets overview page, web reports overview, and the contextual help experience. We also provide pagination and search capabilities to improve heavy-content pages, such as the Associations page and the Access Rules page. We also make Adaptive Planning easier to use by delivering several accessibility improvements, such as keyboard navigation and screen reader support.

Watch the video: 2m 58s

Delay the New Interface Changes

Release: 2021-09-11

For convenience, we now enable you to delay the latest user interface changes of each release until the next release. This enables you to complete important business tasks in a familiar setting.

We provide a new Apply Latest User Interface Updates check box on the Visual Preferences page in general settings. We automatically enable the setting so that you can use the newest updates before making your decision. When you disable the setting, we revert the user interface to the state prior to the current release.

By the setting, we also display a list of features that are currently switched on or off. We update the list with each release.

See [Change Visual Preferences](#).

Explore Cell

Release: 2021-10-14

See [Improved User Interface for Explore Cell](#).

Sheets Overview

Release: 2021-09-11

We now provide:

- A new look to the Levels drop-down list, including a new icon for elimination levels.
- A new More icon in the toolbar where you can select Search Cell Notes or Search Audit Trail.
- A new navigation section, enabling you to access either level-assigned sheets or assumption sheets. We also enable you to collapse or expand the navigation section.
- A new search field, enabling you to enter keywords to find sheets.
- New sorting abilities, enabling you to sort the sheet names in descending or ascending alphabetical order.

See [Concept: Sheets Quick Tour](#).

Reports Overview

Release: 2021-09-11

To provide a more consistent user experience, we update the reports overview page by delivering a new:

- All option in the navigation, enabling you to access all your reports across all folders.
- Breadcrumb trail, making it easier to navigate the folder structure.
- Contextual search, making it easier to find reports within a folder.
- Icon that you can use to access the contextual menu for a report on each row.

Also, we add new arrow icons that enable you to reorder files in the Favorites folder.

We also update the the Add New menu by:

- Adding an option to create a new folder.
- Moving it to the left side of the page.

See [Concept: Reports Quick Tour](#).

Workflow Status Updates

Release: 2021-09-11

We provide a new interface for Workflow status updates on the Sheets Overview page. The Workflow Status section opens on the right of the screen. In the new section, we enable you to see who last updated the status, add a note, or change the status.

We enable you to open the Workflow Status section by clicking the:

- Status indicator next to the sheet name for assumption sheets.
- Workflow Status indicator from the toolbar for level-assigned sheets.

We also enable you to sort assumption sheets by Workflow status.

See [Steps: Use Workflow](#).

View Details on Associations

Release: 2021-09-11

When you click the View Details option on an association in Administration, we now display:

- A search bar.
- Pagination.

This improves performance, making it faster and easier to find what you need.

Associated Users Column on the Associations Page

Release: 2021-09-11

We remove the Associated Users column on the Associations page in administration. You can continue to access the associated users when you view details on the association.

Pagination on Access Rules Page

Release: 2021-09-11

We now display pagination on the Access Rules page in administration, improving performance by making it faster and easier to find what you need.

Accessibility

Release: 2021-09-11

We improve accessibility to help comply with the Web Content Accessibility Guidelines 2.1:

- Assistive technology support with screen readers and magnifiers.
- High contrast color.
- Keyboard shortcuts.
- Screen navigation with logical tabbing, alt text for images.

We provide these accessibility features on high-use pages:

- Explore Cell
- Login Page
- Reports Overview
- Sheets Overview
- Welcome Page

Note: You can't use the new Explore Cell user interface and related accessibility in instances with consolidation capabilities.

New Help Center and Contextual Help

Release: 2021-09-11

We provide a new documentation site to provide a more consistent user experience with the Workday Administrator Guide.

We update:

- Documentation links, including contextual help, to now direct you to the new documentation site.
- Links to the retired Workday Adaptive Planning Knowledge Center to now direct you to new Workday Adaptive Planning Help Center Home page.

Note: The Japanese localized content is not yet available. We plan to deliver it in a future update.

Japanese Localized Content in Help Center

Release: 2021-10-15

We now support Japanese localized content in the Adaptive Planning Help Center.

OfficeConnect Ad Hoc Analysis

With this release, we continue to improve the OfficeConnect ad hoc analysis functionality. We now enable users to quickly apply and expand elements, providing faster dimensional analysis.

Apply and Expand Elements

Release: 2021-09-11

We now enable you to apply and expand elements from the Elements pane in a single action. Previously, you had to first apply the element to your report and then expand it as separate actions.

You can use the Apply and Expand option from either areas:

- The right-click context menu in the Elements pane.
- The Elements group of buttons in the OfficeConnect tab.

Expand to Any Level

Release: 2021-09-11

We now enable you to expand a parent element to any level within its hierarchy. The default expansion displays only the elements at the hierarchy level you select.

To override the default, uncheck the option to exclude ancestors from the expansion.

Exclude Uncategorized Elements from an Expansion

Release: 2021-09-11

We now provide a new workbook property that enables you to exclude the uncategorized and Only elements from an expansion.

Example: You can exclude these uncategorized and Only elements when you expand the parent element:

- Product (Uncat)
- United States (Only)

Expand to Any Level with Multiple Parents

Release: 2021-09-11

We now enable you to expand a single parent element to any level within its hierarchy. The default expansion displays only the elements at the hierarchy level that you select.

To override the default option, you can unselect the option to exclude ancestors from the expansion. When multiple parent elements exist at the same location, you can select a single parent to expand in the Elements section.

See [Steps: Explore Reports Using Ad Hoc Analysis](#).

Perspective Context Filters

You can now mass apply multiple perspective filter changes in dashboards. This enables you to quickly correct data intersections and saves time by avoiding a refresh after each filter selection.

Save Perspective Filter Selections

Release: 2021-09-11

We now automatically save your dashboard perspective filters in your web browser when you change filter selections.

Perspective Context Bulk Filter Selection

Release: 2021-09-11

We now provide a new filter button in dashboards that enables you to change multiple perspective filters in bulk.

We also provide a new Reset to Default button from the new filter button in dashboards, enabling you to reset perspective filter settings to the last published state.

See [Change Perspective Filters in Bulk](#).

Erase Data in Adaptive Planning

With Workday 2021R2, we continue to enhance the Erase Data functionality. You can now erase plan or actuals data. This improves the user experience and provides more consistency with the user interface of the eraseData API and the Integration loaders.

Watch the video: 3m 43s

Note: Access rules don't apply to the Erase Data functionality. Any user with access to Erase Data can delete data for any level, version, account, and time intersection.

Erase Actuals Menu Renamed Erase Data

Release: 2021-09-11

We now enable you to erase plan data from general ledger, custom, and cube accounts based on the version and level you select. For consistency, we rename the Erase Actuals menu to Erase Data.

See [Erase Data from Integration Management](#).

Select Versions

Release: 2021-09-11

With this update, we enable you to select any non-virtual or plan version when you delete data from Adaptive Planning using the Erase Data main navigation menu.

See [Erase Data from Integration Management](#).

Select Accounts

Release: 2021-09-11

We now enable you to delete the GL, custom, or cube account data. When you choose a rollup account, we delete the data in its child accounts.

We also enable you to erase plan data from calculated accounts with a data entry override. When you erase plan data from a calculated account that:

- Contains data, we delete all data from the calculated account.
- Is an aggregation of a source account, then we don't delete any data.

See [Erase Data from Integration Management](#).

Select Levels

Release: 2021-09-11

With this update, we enable you to select the levels you want to delete data from. When you select a parent level, we automatically select its child levels.

We also add a new Select All Levels option that you can use to delete data from all levels.

See [Erase Data from Integration Management](#).

Erase Data Permission

Release: 2021-09-11

For consistency, we rename the Erase Actuals permission to Erase Data in the Permission Sets admin page. If a user already had Erase Actuals permissions, we automatically add them to the Erase Data permission.

Note: Users must have access to the Import to All Locations permission before you can add them to the Erase Data permission.

See [Reference: Available Permissions](#).

Enable Erase Data in General Setup

Release: 2021-09-11

You can now enable the Erase Data tab for your Planning Data Loaders from Administration > General Setup by clicking Enable Integration Loaders – Erase Data in the Enable Features section.

See [Reference: General Setup](#).

Data Agents

With this release, we continue to improve Data Agents. You can now access the Data Agent using your Workday credentials without requesting additional permissions.

Data Agents Use ISU Users

Release: 2021-09-11

You can now access Data Agents without requesting the Adaptive Planning API Access domain when user sync is enabled.

See [Log In to the Data Agent and Script Editor with Workday Credentials](#)

Salesforce Integration

You can now upgrade your Salesforce Integration to use the latest version 51 Salesforce endpoint.

See [Steps: Set Up Salesforce Data Sources](#).

Upgrade Salesforce Data Sources

Release: 2021-09-11

We add a new Upgrade to v51 menu in the Actions pane for Salesforce data sources that use version 32 and older.

Compare Table Structures

Release: 2021-09-11

To support the new Upgrade to v51 menu, we now enable you to compare new tables with existing table structures. When you change new structures, we now provide a report with these details:

- Schema change summary.
- Dependency check details of items using the changed structures.

Adaptive Planning - Miscellaneous Enhancements

User Administration Interface

Release: 2021-09-11

We enhance the user pages in the Administration section, providing faster navigation, search, and usability.

We now:

- Enable you to search for users by name so that it's faster to create users and export user permissions.
- Enable you to export permissions data for all users, instead of only the listed users.
- Use pagination when the list includes more than 25 users.
- Display an error when search returns no results.

We also rename the:

- Printable View button on the All Users page to Export User List.

- Email field on the Permission Sets pages to Login.

See [Create Users](#), [Concept: Permission Sets](#).

Sync Workday Users to Adaptive Planning

Release: 2021-09-11

We continue to enhance the syncing of Workday users to Adaptive Planning. We now enable you to:

- Edit any mismatched users in Adaptive Planning after you first run and then re-run user sync.
- View the time zone alignment between Workday and Adaptive Planning after user sync.

See [Sync Users with Adaptive Planning](#).

Drill into Transactions from Cube Standard Accounts

Release: 2021-09-11

We now provide the Drill into Transaction link when you launch Explore Cell from cube standard accounts. We also now provide the Drill into Transaction option when you right-click on cells of cube standard accounts.

See [Concept: Drill Down and Drill Through](#).

Journal Entries Replace Reclassification Rules

Release: 2021-09-11

You can no longer enable reclassification rules for instances. If you currently use reclassification rules, you can continue using it, but we recommend that you use journal entries to manage reclassifications instead.

You can use journal entries to:

- Post reclassification entries as journal entries or as a journal entry subversion of the actuals version.
- Reclassify any portion of an account.
- Replace reclassifications rules and create automation using recurring journal entries.
- Retain the specific level for the reclassification.

See [Create a Journal Entry](#).

Dimension Value Renamed to Dimension Value Code in Users Associations Import

Release: 2021-09-11

We rename the Dimension Value column in the Import User Associations template file to Dimension Value Code. This helps to clarify that the import remains backward compatible for template files that use Dimension Value as the column name.

Unicode White Space Characters Disallowed in Name or Short Name

Release: 2021-09-11

You can no longer enter Unicode white space characters in name and short name when using:

- Level, Dimension, and Attribute admin pages.
- `updateLevels`, `updateDimensions`, and `updateAttributes` for API v30.
- Excel import for Level/Dimension/Attribute structures.

A space character is allowed between words. Refer to [https://docs.oracle.com/javase/7/docs/api/java/lang/Character.html#isWhitespace\(char\)](https://docs.oracle.com/javase/7/docs/api/java/lang/Character.html#isWhitespace(char)) for the complete list of Unicode white space characters.

See [updateLevels](#), [updateDimensions](#), [updateAttributes](#).

Dimension and Attribute Values in Excel Structure Imports

Release: 2021-09-11

You can no longer enter a dimension value or attribute value in the same row as its dimension or attribute in Excel structure imports. A row in the template can't contain:

- Both the dimension and dimension value information.
- Both the dimension attribute and dimension attribute value information.

Enter dimension value and attribute value information in the rows below their dimension or attribute.

Download Web Reports from Main Navigation

Release: 2021-09-11

We enhance the downloading experience for web reports in Excel and PDF formats. We now open an Excel or PDF report from the main navigation menu in a new browser tab.

See [Concept: Web Reports](#).

OfficeConnect User Setting for Multiple Tenants

Release: 2021-09-11

We deliver a new Connections option on the user settings page. When you select the option, we display a prompt on the login page that enables OfficeConnect users to select a tenant before they log in and authenticate.

Note: This only applies to users with single sign-on (SSO) where the identity provider automatically logs in the user.

See [Sign in to OfficeConnect with Workday Credentials](#).

Add Notes After Changing Any Report Parameter Value

We expand collaboration capabilities for report users. After a user changes any parameter value on a report, we now enable you to add notes without moving the report back to an unsaved status.

See [Add Report Notes](#) and [Add Line Notes to Reports](#).

OfficeConnect System Variable Label Change

Release: 2021-11-12

We rename the Book Name system variable label in OfficeConnect for Adaptive Planning to Workbook Name. This makes it easier to distinguish the system variable label from the Book dimension in OfficeConnect for Workday Financials.

See [Reference: Report Label Types and Values](#).

OfficeConnect and EIP Login Page Change for License Agreement

Release: 2021-11-12

We deliver a new license term link that now also supports planning and analytics as well as financials customers. New OfficeConnect and Excel Interface for Planning (EIP) users can use the link to view license agreement terms.

Note: This change doesn't apply to existing customers.

Metadata Loader Column Mapping

We renamed the Column Mapping columns in the Level, Attribute, Association, and Dimension loaders to make mapping easier.

Renamed Columns in Column Mapping

Release: 2021-09-11

When you map columns in the Column Mapping tab for Level, Attribute, Association, and Dimension loaders:

- The Source Id Column becomes the Source Column.
- Level, Dimension, Association, and Attribute Display Name columns become Level, Dimension, Association, and Attribute Name rows.

Note: The Source Display Name column was removed from Level, Association, Attribute, and Dimension loaders to split Source Display Name into multiple rows.

See [Create Planning Attribute Loaders](#), [Create Planning Dimension Loaders](#), [Create Planning Level Loaders](#).

Traditional Chinese Language Support

We expand our local language support by adding Traditional Chinese to Adaptive Planning.

Note: Note: For details, see the Language Translations feature in the System functional area on the What's New in Workday report.

Traditional Chinese Language Support

Release: 2021-09-11

We now support displaying all text in Traditional Chinese throughout Adaptive Planning.

Plan Publishing

We improve the plan publishing process to provide a better user experience. You can now include or exclude dimension values and general ledger accounts in your plan structure. We also enhance the performance of publishing high-volume headcount and financial plans by now segmenting them into periods during publish. We also now enable you to publish zero full-time equivalent (FTE), providing greater flexibility.

Select Dimensions to Include or Exclude

Release: 2021-09-11

You can now indicate the dimension values to include or exclude in your Workday Plan Structure.

See [Concept: Publish Plans from Adaptive Planning](#).

Import Headcount Plan Web Service

Release: 2021-10-08

We update the Import Headcount Plan web service to now support rows with zero full-time equivalent (FTE) when you use FTE as a statistic type on your headcount plan template. This enables you to include rows with zero FTE when you publish headcount plans.

Note: Workday automatically uses the web service when you publish headcount plans.

Import Multiple Account Links

We update the import template so that you can add multiple source accounts to linked accounts, saving you time and effort.

Watch the video: 3m 10s

Account Import Template Supports Multi-Links

Release: 2021-09-11

We update the account import templates, enabling you to import link settings. The Linked Account column now supports more than one source account.

We also add new columns to support the link settings:

- Applied Dimension
- Applied Dimension Values
- Change Sign +/-

See [Import and Export Accounts](#).

Plan Publishing by Period

We improve the performance of publishing large Headcount and Financial plans by segmenting them into periods during publish. This publishes the plan faster and enables more fine-grained plan troubleshooting.

Publish Plan by Period

When you publish a plan, the Publish History in Adaptive Planning now includes expandable and collapsible rows containing links for each period submitted to the Workday Process Monitor.

See [Concept: Publish Plans from Adaptive Planning](#).

Request the Excel Interface for Planning Add-In

We now enable you to request the Excel Interface for Planning (EIP) add-in. You can use the add-in to streamline the planning process.

Access Excel Interface for Planning

Release: 2021-09-11

We now enable additional customers to request the Excel Interface for Planning (EIP) add-in.

If you haven't used this functionality within the past 4 months, you must open a provisioning case in the Workday Customer Center to enable it for your instance.

See [Concept: Excel Interface for Planning](#).

Level, Dimension, and Attribute Codes for Display Names

With this release, you can now synchronize dimension hierarchies that contain duplicate labels. This provides a more seamless experience when loading metadata from Workday Core into Adaptive Planning.

Display names are not available for instances:

- Enabled for Excel Interface for Planning.
- That include a modeled sheet set up to define anomaly thresholds.

Code and Display Name for Dimension Values, Attribute Values, and Levels

Release: 2021-11-12

We add these new fields on Admin pages for dimensions, levels, and attributes:

- Code, which is a unique identifier that's required for each dimension value, attribute value, and level in Adaptive Planning.
- Display Name, which displays for each dimension value, attribute value, or level in Adaptive Planning

Note: We automatically populate the Name value in the:

- Code field for dimension values, attribute values, or levels that existed in Adaptive Planning prior to 2021-11-12.
- Display Name Field.

You can also edit the Code and Name fields on the Admin pages.

See [Concept: Level, Dimension, and Attribute Codes for Display Names](#)

Metadata APIs Include Code and ID

Release: 2021-11-12

We update these bulk APIs to now support code when you enable display names that all use ID as a key:

- updateAttributes
- updateDimensions
- updateLevels
- exportLevels
- exportDimensions
- exportDimensionMapping
- importDimensionMapping

We also update these data APIs to support code when you enable display name elements:

- eraseData
- exportConfigurableModelData
- exportData
- importConfigurableModelData
- importStandardData
- importCubeData
- importTransactions

We also deliver a new `displayNameEnabled` property that you can enable for display names in these APIs. You must enable the `displayNameEnabled` property in each call.

See [Concept: Level, Dimension, and Attribute Codes for Display Names](#)

Configure Display Name

Release: 2021-11-12

We enable you to configure the format of the new Display Name field on the Admin pages for dimension values, attribute values, and levels. You can use 1 of these formats:

- Code
- [Code] Name
- Name
- Name [Code]

Note: When you change the format or a component of the display name, we re-sort the elements in Admin pages based on the new format or changed component, even when you've enabled the Keep Sorted option.

See [Concept: Level, Dimension, and Attribute Codes for Display Names](#)

Display Name Elements in Adaptive Planning Integration

Release: 2021-11-12

In Adaptive Planning Integration loaders for dimensions, attributes, and levels, you can now load metadata elements that use the same label. The loaders automatically use the value in the Code field as the unique identifier. You can select to automatically map levels, dimension, and attributes based on the Code field using the Planning Data Loader.

Note: For the dimension, level, and attribute loaders to run, you must map the Code field in your column mappings.

See [Concept: Level, Dimension, and Attribute Codes for Display Names](#)

Dimension Structure Excel Import

Release: 2021-11-12

We deliver these new columns in import templates for dimension structures:

- Dimension Short Name.
- Dimension Description.
- Display Name Format.
- Dimension Value Code.
- Dimension Value Name.
- Dimension Value Display Name.

Note: We strongly recommend that you download a new import template each time you import.

See [Concept: Level, Dimension, and Attribute Codes for Display Names](#)

Attribute Structure Excel Import

Release: 2021-11-12

With this update, we add these new columns in import templates for level attribute, account attribute, and dimension attribute structures:

- Attribute Description.
- Attribute Short Name.
- Attribute Value Code.
- Attribute Value Name.
- Display Name Format.

Note: We strongly recommend that you download a new import template each time you import.

See [Concept: Level, Dimension, and Attribute Codes for Display Names](#)

Level Structure Excel Import

Release: 2021-11-12

We deliver these new columns for level structures:

- Code.
- Description.
- Dimension Code.
- Dimension Name.
- Attribute Code.
- Attribute Name.

Note: We strongly recommend that you download a new import template each time you import.

See [Concept: Level, Dimension, and Attribute Codes for Display Names](#)

Code and Display Name Formula Support

Release: 2021-11-12

We now enable you to copy and paste the Code or Display Name value for levels, dimension values, and attribute values in these fields:

- Shared Formulas Menu
- General Ledger leaf account Specify Default Formula – Formula Assistant
- General Ledger leaf account Formula – Formula Assistant
- General Ledger leaf account Default Formula – Formula Assistant
- Consolidation Rules Formula Assistant

See [Concept: Level, Dimension, and Attribute Codes for Display Names](#)

Planning Data Source Support for Code

Release: 2021-11-12

We update the Planning Data Source with a new Include Codes check box to support custom, cube, and modeled sheet sources. We automatically select the new check box on new Planning Data Sources. You can deselect the check box for integrations that don't require code.

See [Concept: Level, Dimension, and Attribute Codes for Display Names](#)

Download Options for Sheets

Release: 2021-11-12

To support duplicate member names, we change the behavior of the Download button in the sheets toolbar.

On modeled sheets, we remove the Download button and instead deliver a new drop-down menu that contains these 2 options:

- Download, which opens an Excel file with new columns containing the codes for levels, dimension values, and attribute values. The codes enable you to import this spreadsheet.
- Printable View which opens an Excel file with columns containing your configurable display names for levels, dimension values, and attribute values. We also keep your current display options of the sheet intact with the printable view. You cannot import this spreadsheet.

On modeled sheets on dashboards, in the More menu:

- You can continue to use the Download option. We update the Excel file to now include the codes for levels, dimension values, and attribute values. This enables you to import the spreadsheet.
- We add the new Printable View option, enabling you to open an Excel file with the configurable display names for levels, dimension values, and attributes. This also keeps your current display options of the sheet intact. You can't import this spreadsheet.

Note: In cube and standard sheets, you can continue to use the Download button in the toolbar.

See [Concept: Level, Dimension, and Attribute Codes for Display Names](#)

Dimension Mapping Excel Import

Release: 2021-11-12

We update the dimension mapping import template to now use the dimension value code instead of the name.

Note: We strongly recommend that you download a new import template each time you import.

See [Concept: Level, Dimension, and Attribute Codes for Display Names](#)

Display Name in Dimension Mappings on Dashboards

Release: 2021-11-12

In dimension mappings on dashboards, we rename the Name label to Display Name. This ensures that we don't display duplicate values for levels and dimensions.

Also, we update filter results to now highlight any values that contain the filter query, instead of only an exact match.

See [Concept: Level, Dimension, and Attribute Codes for Display Names](#)

Download and Upload Mappings for Metadata Loaders

You can now download, view, and upload external system mappings for metadata loaders, enabling you to quickly resolve any mapping issues you might experience.

Download Mappings and Upload Mappings Links

Release: 2021-10-15

You can click Download Mappings and Upload Mappings links in the Actions pane for:

- Dimension Loaders
- Level Loaders
- Account Loaders
- Attribute Loaders

The new Download Mappings link enables you to download in XLSX file format.

The new Upload Mappings link enables you to upload 1 sheet of mappings in XLSX file format. When you upload mappings, we:

- Replace all of your existing mappings with the one you upload.
- Evaluate each row in your mappings for duplicates or missing elements in Adaptive Planning. Any errors automatically cancel the entire payload.

Note: If you upload more than 1 sheet of mappings, we only upload the first sheet.

Levels on Cube Sheet Data Imports

We improve the user interface of the Import Cube Sheet page to now only display levels associated with the cube sheet, making it faster and easier to import your data.

Hide Unavailable Levels on Import Data Page

Release: 2021-10-15

We now hide levels that aren't associated with the cube sheet on the Level Mapping section of the Import Data page, preventing you from importing rows using levels that aren't on your cube sheet.

Merged Cube Sheets

Release: 2021-11-12

With this release, we continue to enhance merged cube sheets functionality for improved usability.

We now automatically enable you to use the merged cube option for all tenants when you build new cube sheets. We no longer require you to submit a provisioning ticket.

See [Concept: Merged Cube Sheets](#).

Adaptive Planning Support and Feedback

With this update, we provide access to the Workday Resource Center, which includes the Workday Community, Workday Customer Center, and Workday Learning Center. As part of our continued integration of Adaptive Planning with Workday, these changes are designed to help you get the most from Workday, while providing an exceptional customer experience and stronger security protocols.

See [Reference: Contact Us](#)

Watch the video: 2 min 38 s

Access to Workday Community

Release: 2022-02-11

We now provide all Adaptive Planning customers access to the Workday Community. The Community provides a centralized platform for resources, support, and engaging conversations on all Workday products, including Workday Adaptive Planning. The Community hosts:

- Brainstorms: Submitting feature enhancement suggestions to Workday product management.

- Product Innovation Experience events: Find information on new features, fixes, and content.
- Workday Adaptive Planning product roadmap: See what's coming up in future releases.

We enable you to request access to Community from the Community login page. Your designated Community Organization Administrator is responsible for approving requests.

Workday Customer Center Replaces Customer Support Portal and Contacts

Release: 2022-02-11

We replace the Customer Support Portal with the Workday Customer Center. We enable your Named Support Contact to access the Workday Customer Center when they click Support > Submit a Request from the nav menu of Adaptive Planning. Once your initial NSC has access to the Workday Customer Center, they can add additional NSCs and manage other roles through the Contacts Management functionality.

Only Named Support Contacts can sign in to the Workday Customer Center to create cases. If you think you should be an NSC and you don't have access to the Customer Center, request it from the Login page. Your existing NSC approves your request.

We also retire the existing case management tool, Support email addresses, and Support phone numbers.

Brainstorm Replaces Product Feedback

Release: 2022-02-11

Brainstorm in Community is the new space where you can provide product feedback and suggestions. We change the nav menu label and the Welcome page tile from Product Feedback to Product Suggestions. Both links take you to Brainstorm in Community.

We enable you to request access to Community from the Community login page. Your designated Community Organization Administrator is responsible for approving requests.

Community Replaces Customer Engagement

Release: 2022-02-11

We replace the Customer Engagement tile on the Welcome page with a new Community tile. This tile routes directly to the Workday Community login page.

We enable you to request access to Community from the Community login page. Your designated Community Organization Administrator is responsible for approving requests.

Adaptive Training Moves to Workday Learning Center

Release: 2022-02-11

We migrate all Adaptive Planning Training Center to the Workday Learning Center. We also migrate training record completions and create Workday Learning Center accounts for all users who have signed into the Adaptive Planning Training Center since November 1, 2019.

Your designated Training Coordinator manages training approvals and assignments for the rest of your team.

Torchbearers Platform Retires

Release: 2022-02-11

We retire all access to the Torchbearers discussion forums, challenge activities, and rewards redemptions.

Office Hours Replaces Customer Enablement

Release: 2022-02-11

We change how you contact the customer enablement team. We now provide Office Hours, which Named Support Contacts can purchase and schedule from the Workday Customer Center.

Related Information

Concepts

[Community: Introducing Workday Adaptive Planning to the Workday Community](#)

[Community: Customer Support FAQ for Adaptive Planning](#)

[Community: Customer Training - Helpful Information and FAQ](#)

[Community: Office Hours](#)

Prior Releases

2021R1 Release Notes

2021R1 Release Notes

[2021R1 Feature Overview - General Availability Recorded Session](#)

2021R1 Service Pack Releases

Release: 2021-06-11

- [Removed Unused Dimension Values in Bulk](#)

Release: 2021-05-14

- [Add Formulas to Cube-Entered Accounts](#)
- [CCDS and CCL Column Order](#)
- [Change and Save Standard Sheet View](#)
- [Data Entry Overrides through Planning Data Loaders](#)
- [Drill Down Into Workday With Matrix Reports](#)
- [Import and Export Formula Overrides](#)
- [Linked Accounts](#)
- [Merged Cube Sheets Available in Production Instances](#)
- [NetSuite Embedded](#)

Release: 2021-04-09

- [Additional User Attributes for createUser and updateUser APIs](#)
- [Anomaly Thresholds Modeled Sheet CCDS Default Memory Limit](#)
- [Decimal Precision for Publishing Financial Plans](#)
- [Delete Associations](#)
- [Planning Association Loader Replace Mode](#)
- [Prediction Version Type](#)
- [Skip Unmapped Metadata in Planning Association Loader](#)

Release: 2021-04-05

- [Access Rules for All New Adaptive Planning Instances](#)

Adaptive Planning Dashboard Charts

With this release, we continue to improve dashboard charts. You can now hide all data points with a value of zero or null in dashboard charts, enabling you to display all relevant data.

Suppress Zeros

Release: 2021-03-12

You can now suppress zeros to focus your visualizations on relevant data points when you break down your charts by dimension. This also suppresses null values.

We add a Suppress Zeros toggle for all the charts when you break down by dimension in Appearance Settings > Breakdown. This enables you to suppress zeros for:

- Crosstabs in Data Settings > Columns.
- Scorecards in Appearance Settings > General.

You can't use suppress zeros functionality:

- For geo maps.
- When you breakdown your charts by time.

See [Reference: Data Breakdown](#)

Adaptive Planning Miscellaneous Enhancements

Column Limit for Matrix Reports

Release: 2021-03-12

You can no longer include more than 16,384 columns in a matrix report.

Cutting and Pasting in Modeled Sheets

Release: 2021-03-12

We improve the performance of modeled sheets when you cut, copy, and paste data.

New Version Button Updates for Sales Planning

Release: 2021-03-12

For a more consistent user experience, we update the New Version button for the version prompt across all areas. When you create a new version, we rename the Baseline field to Copy from Version.

Upgrade OfficeConnect and Excel Interface for Planning

Release: 2021-03-12

If you are using both OfficeConnect and Excel Interface for Planning, upgrade both add-ins to their latest versions for compatibility.

See [Product Downloads](#).

CCDS Default Memory Limit

Release: 2021-04-09

We increase the default memory limit for CCDS from 100 MB to 800 MB and the CCDS default page size to 10000 rows

See [Concept: Design](#)

Adaptive Planning User Security

We continue to provide a more consistent user experience by improving user security for Adaptive Planning. Also, if you use user sync functionality, you can now enable proxy users to sign in to Adaptive Planning in non-Production tenants.

Proxy Users

Release: 2021-03-12

If you use SAML SSO with user sync, you can now configure proxy user access in non-Production tenants.

See [Steps: Set Up Proxy User Access to Adaptive Planning](#)

Create User Without Password

Release: 2021-03-12

If you previously enabled SAML SSO, we now enable you to create a Workday Adaptive Planning user without specifying a password, saving you time and effort.

Rename Adaptive Planning Role

Release: 2021-03-12

In the Adaptive Planning user interface, APIs, and documentation, we rename the term "Role" to "Permission Set" for consistency.

Additional User Attributes for createUser and updateUser APIs

Release: 2021-04-09

We deliver these new attributes that you can use in the createUser and updateUser APIs:

- alternateEmail, enabling you to add an alternate email, which we automatically select as the user's email in the User Details section. This eliminates the need to manually update the Email field.
- samlFedId, enabling you to include the SAML federation ID for the user for single sign-on.

See [createUser](#) and [updateUser](#).

Anomaly Detection and Outlier Reporting

We continue to make improvements to intelligent planning to help you create more robust and accurate models. Anomaly detection and outlier reporting enable you to identify outliers in general ledger accounts on standard sheets. They also enable you to analyze comparisons between machine learning predictions and your plans and budgets.

Watch the video: 4m 45s

Self-Service Setup

Release: 2021-03-12

We now provide anomaly detection and outlier reporting to all Adaptive Planning instances enabling you to create more accurate plans with machine learning.

We also add a new Intelligent Planning section to Modeling, enabling you to generate the predictions after creating a special prediction version.

See [Steps: Set Up Intelligent Planning](#).

Generate Predictions

Release: 2021-03-12

We provide a new ML Predictions page that you can access from a new Intelligent Planning section on the Model Management page. On the new page, we also add a new Generate Predictions button that you can click to generate and display prediction information, helping you validate your intelligent planning setup.

See [Generate Intelligent Planning Predictions](#).

Anomalies in Cumulative Accounts

Release: 2021-03-12

We remove cumulative accounts from the prediction version so that they no longer show anomalies, improving the accuracy of the algorithm.

Anomaly Thresholds Modeled Sheet

Release: 2021-04-09

To provide greater flexibility, we now enable you to define anomaly thresholds in modeled sheets. You can define thresholds for the upper and lower bounds either globally or for each account, level, and version.

To use this functionality, you must:

- Name the modeled sheet AIML-THRESHOLD.
- Select only 1 leaf level.
- Use these columns: ad_level, ad_account, ad_version, upper, and lower.

See [Define Anomaly Thresholds](#).

Prediction Version Type

Release: 2021-04-09

We now provide a new Prediction Versions plan version type, enabling you to use any name for the machine learning prediction version. Now, you no longer must use AIML-FORECAST as the name of your prediction version.

To support the new plan version type, we display a new drop-down when you click the Create New Plan Version button. In the drop-down, we display these options:

- Create plan version.
- Create prediction version.

Note: When you generate predictions, we:

- Enable you to copy the consolidation percentages and exchange rates from another plan version.
- Use the date you select in the Start of Plan setting as the start date for the prediction.

See [Create Prediction Versions for Intelligent Planning](#).

Associate Users with Levels and Dimensions

With this release, we improve how you associate users to levels and dimensions, saving you time and manual effort. Also, you can now use associations when you configure dynamic access rules.

Watch the video: 4m 19s

Associations Menu Option

Release: 2021-03-12

We provide a new Associations page when you go to Administration > Users and Roles and click Associations. We display a table with level ownership and other associations listed as separate rows.

Also, you can now review an association by user or by the associated dimension by clicking the View Details option.

In the associations toolbar, we also provide new buttons to export associations and to import new or updated associations.

See [Concept: Associations](#).

Level Ownership as an Association

Release: 2021-03-12

Now, level ownership is an association. This enables you see all level owners and their levels in 1 place. You can also now use the Association template, API, or loader to create or update level owners.

See [Concept: Level Ownership](#).

Association Codes

Release: 2021-03-12

We now enable you to use association codes, which are unique to the associated dimension. You can add the codes to your import template.

You can also use the codes as a dynamic reference, instead of either levels or custom dimensions in the access rule template. This grants the user access to the levels or custom dimensions listed in the association for the user. You can then update the associations without having to update the access rules.

Note: We require an association code for additional level associations and custom dimension associations. You can't add association codes for level ownership. Instead, those rules contain level ownership associations.

See [Concept: Associations](#).

Association Import Template

Release: 2021-03-12

We provide a new Associations Template that you can access from the toolbar, enabling you to import associations.

See [Import Associations](#).

Integration Loaders

Release: 2021-03-12

We provide a new loader for level and dimension associations that enables you to indicate a user's levels and dimensions associations. This automates the process of assigning levels and dimensions to users, saving you time and effort. This also makes it easier to manage user access after user sync from Workday.

See [Create Planning Association Loaders](#).

updateAssociations API

Release: 2021-03-12

You can now update users level associations and ownership, as well as dimension associations with a new updateAssociations API. This helps to reduce manual effort, minimize error, and simplify user association maintenance.

See [updateAssociations](#).

Workday Assignable Role Report Fields

Release: 2021-03-12

We deliver these new report fields on the Plan Dimension business object (secured to the Public Reporting Items domain) that you can use in condition rules and custom reports:

- Adaptive Planning System Users for Assignable Role
- Assignable Role
- Assignable Role Reference ID

When you use these fields in custom reports, you can load the assignable roles for users into Adaptive Planning.

See [Load Associations After User Sync](#).

Skip Unmapped Metadata in Planning Association Loader

Release: 2021-04-09

We update the Planning Association Loader to no longer return an error for unmapped metadata. Instead, the Planning Association Loader now skips unmapped metadata, displays a warning, and continues processing.

See [Create Planning Association Loaders](#).

Planning Association Loader Replace Mode

Release: 2021-04-09

We now enable you to select these modes in the Planning Association Loader:

- Update, enabling you to only add users.
- Replace, enabling you to delete all of the users and replace them.

See [Create Planning Association Loaders](#).

Delete Associations

Release: 2021-04-09

We provide a new Remove option in the import associations process, enabling you to delete associations using the Associations template.

See [Import Associations](#).

Bulk Select Context Filters

Contains preview content available only to customers invited to test a new offering or capability. Do not share.

Release: 2021-03-12

You can now group and apply multiple perspective filters on your dashboards. Group Filter Selection on Dashboards saves time and enables you to quickly correct data intersection by avoiding a refresh after each filter selection.

1. Click the Filter icon on the perspective toolbar.
2. Select Time, Level, Currency, Market Segment, and Country from the Filters dialog and Apply. This will update the perspective filters and refresh your dashboard widgets.

The default values are the ones set in the perspective toolbar. Selecting Reset to Default will revert your changes to the default filter values.

Filters affect each other the same way they do in the perspective toolbar. Example: Dashboard update in response to level/attribute changes.

Your settings are saved and will persist till you apply different filters.

Calculated Accounts for Adaptive Planning

With 2021R1, we offer more flexibility for calculated accounts, enabling you to fine-tune account data for each version. You can set versions to use default formulas, override formulas, or data entry.

Also, you can now override the formulas of calculated accounts so that users can enter or import data for specific versions without affecting the calculations for other versions.

Watch the video: 4m 9s

Data Entry Override Setting

Release: 2021-03-12

In account settings, we provide a new *Data Entry* formula override setting. You can use the new setting to remove the calculations from the account, enabling you to either import data or enter data in sheets for specific versions without affecting locked versions.

You can use the new setting for:

- Calculated cube accounts.
- Custom accounts with formulas.
- General ledger accounts with master formulas.

See [Change Account Formulas and Override Formulas](#) and [Concept: Account Formulas and Overrides](#).

Disable Formula Override Setting

Release: 2021-03-12

We add a new Disable Version-Specific Formula Setting check box in account settings, enabling you to quickly delete the override formulas for the account. This enables the account to use the default formula for all versions instead, including locked versions.

See [Change Account Formulas and Override Formulas](#) and [Concept: Account Formulas and Overrides](#).

Copy All Override Formulas for Clone Versions

Release: 2021-03-12

In version settings, we deliver a new Copy All Override Formulas check box when you clone versions. This enables you to indicate if you want to copy all the overrides or only the default formulas.

See [Create Plan Versions](#).

Rename Version Setting

Release: 2021-03-12

When you create new plan versions, we rename the Copy Formulas and Rules check box on the New Version Options section in the version settings to Copy Shared Formula and Rules. This makes it easier to differentiate the check box from the Copy All Override Formulas check box.

See [Create Plan Versions](#).

Data Entry Overrides through Planning Data Loaders

Release: 2021-05-14

We now enable you to map and load data into calculated accounts with data entry override using Planning Data Loaders.

Note: You must import data to your calculated accounts in the version specified for data entry overrides. If not, the import fails.

See [Create Planning Data Loaders](#)

Add Formulas to Cube-Entered Accounts

Release: 2021-05-14

We update the cube account administrator page. You can now take these actions for cube-entered custom and general ledger accounts:

- Add formulas on the accounts.
- Create formula and data entry overrides on the accounts.

Note: You must first add the account to the cube sheet before adding the formula.

See Concept: [Cube-Entered Accounts](#) and [Concept: Calculated Accounts](#).

CCDS and CCL Column Order

You can import data with Custom Cloud Data Sources (CCDS) or Custom Cloud Loader (CCL) scripts and retain your column order after changing column types.

CCDS API Changes

Release: 2021-05-14

You can now specify the Column Ids in the `getRowset(columnIds)` method.

- `getRowset(columnIds)` - Returns the Rowset object that rows are added to using your specified column order.

Example: `context.getRowset([ 'NAME', 'ID' ])`

See [Adaptive Planning Functions](#)

CCL API Changes

Release: 2021-05-14

You can now specify the Column Ids in the `createTableReader(columnIds)` method.

- `context.createTableReader(columnIds)` - The `ReadRow()` method returns data in the order of specified column Ids when you input an array of column Ids as parameters in the `createTableReader(columnIds)` method.

Example: `context.createTableReader([ 'NAME', 'ID' ])`;

Change and Save Standard Sheet View

With this release, we enable you to save more view options in sheets. This eliminates the need to change your view each time you open a sheet.

Note: You must submit an account provisioning request to enable this functionality.

View by Account or Level in Minimized View

Release: 2021-05-14

For convenience, in the minimized view on dashboards, you can now select to view by either the account or level.

Save Changes in Sheets and Dashboards

Release: 2021-05-14

We now enable you to save your sheet when you switch between the account and levels views in:

- Standard sheets in the Sheets area.
- Maximized standard sheets on dashboards.
- Minimized standard sheets on dashboards.

In standard sheets, you can now save changes that you make to:

- A pinned account or level.
- Your View By mode.

On dashboards, when you select to view by account or level, we now automatically save your selection as your preferred view. For convenience, we persist your preferred view when you:

- Refresh or return to the page.
- Switch between the minimized and maximized views.

See [Change Standard Sheet View](#).

Cube-Entered Accounts

We bring more flexibility to cube-entered accounts, enabling you to build cube sheets that better align with your business needs. You can build multi-dimension profit and loss sheets that fully leverage custom dimensions, attributes, and linked accounts.

Watch the video: 3m 25s

Reordered Cube-Entered Accounts

Release: 2021-03-12

We provide a new option in the cube sheet settings that enables you to incorporate general ledger and custom accounts into the cube account list. This provides you with more control over how the sheet displays all the accounts.

See [Steps: Remove the Cube Root Account](#).

Dashboard View Settings for Adaptive Planning

We expand dashboard view settings to provide you and your users with more visibility into the data. You can now change the default level and time for perspectives, enabling you to share dashboards that open with the specified levels and time periods that you configure.

Default Level and Time

Release: 2021-03-12

You can now override the default level and time perspective context filters by adding a new Override Default option for level and time in the Data Settings section.

See [Change Default Level and Time Perspective Filters](#).

Decimal Precision for Publishing Financial Plans

When you publish financial plans from Adaptive Planning, we now round the currency values up based on the decimal precision in Workday Financials. This streamlines the process, saving you time and effort.

Currency Evaluation Rounding

Release: 2021-04-09

If a currency value contains precision of more than 2 decimal places, we now round up the value when you publish from Adaptive Planning to Workday Financials. We round up to .10 for values of .05 or greater.

Note: We highly recommend that you set currency precision in Workday Adaptive Planning to match the precision in Workday Financials.

See [Concept: Publish Plans from Adaptive Planning](#).

Derived Dimension Values on Modeled Sheet Rows

We continue to improve derived dimension values on modeled sheet rows, saving you time and effort. We make it easier to build and maintain mapping rules when you have a large level hierarchy. We also improve the dimension mapping on dashboards experience.

Watch the video: 5m 30s

Level Inheritance for Derived Dimensions

Release: 2021-03-12

We now automatically apply your derived dimension rules at a parent level to all child levels.

You can override inherited rules by creating dimension mapping rules at a child level with the same mapping dimension combination as the parent level. You can't update mappings for specific levels without also updating child levels.

Note: You must contact support if you require dimension mapping rules to only impact an individual level rather than all child levels.

See [Steps: Set Up Derived Dimensions](#).

Derived Dimensions on Dashboards

Release: 2021-03-12

When you edit dashboards, we now save the column size changes to dimension mapping tables on dashboards. We also update the perspective context attribute filters to now filter dimension mapping tables on dashboards.

See [Add Dimension Mapping Tables in Dashboards](#).

Drill Down Into Workday Sources from Cube Sheets

You can now drill down into Workday actuals data from Adaptive Planning cube sheets, providing you with more visibility into your data.

Watch the video: 2m 52s

Drill Through Option in Cube Sheet Cells

Release: 2021-03-12

In Adaptive Planning, we deliver a new Drill Through option in cube sheet cells on the:

- Cell explorer.
- Context menu.

When you click the new option, we direct you to Workday so that you can view a summary of the underlying journal entries, enabling you to drill down into the data. We use the parameters from the cube intersection to generate the report in Workday.

See [Drill Down and Drill Through](#).

Drill Down Into Workday With Matrix Reports

With this release, we continue to enhance the ability to drill into Workday using matrix reports. This improves usability by providing functionality more similar to sheets.

Drill Down Using Dimensions

Release: 2021-05-14

We now enable you to drill down into Workday from matrix reports with dimension filters. You can automatically ignore the root dimension when you drill down into Workday.

When you filter the report for all or top of the dimension, we ignore the dimension filter. When you filter the report for a specific dimension, we pass the dimension filter.

See [Drill Down and Drill Through](#).

Erase Data on Planning Data Loader

With Workday 2021R1, we continue to enhance the Erase Data functionality of the Planning Data Loader. You can now erase plan or actuals data independent of the data being loaded. You can also choose to erase data for specific time periods, versions, levels or accounts.

Prerequisites

Required Permissions: Import Capabilities > Erase Actuals. Erasing actuals is a superuser permission that enables erasing actuals or plan data across Adaptive Planning, including in locked levels. Erase Actuals overrides Access Rules and level ownership restrictions. Watch the video: 3m 17s

Define Dataset

Release: 2021-04-09

We add an Erase Settings tab on the Planning Data Loader. You can now select a version parameter, period parameter, account, and level to erase data and optionally include cell notes in the Erase Settings tab. You can also link your account, period, and version parameters in the Erase Settings tab to the Data Source Settings tab of your planning data loader.

Also, we remove the Erase Actuals section from the Data Source Settings tab. Instead, we add all erase configurations in the Erase Settings tab.

To erase data with the Planning Data Loader:

1. Select your loader from the Component Library.
2. Navigate to the Erase Settings tab.
3. Select the Enable Data Erase check box to erase data.
4. Select Edit Parameters in the Actions pane and create Version and Period parameters. You can also choose to use the Version or Period parameters specified in the Data Source Settings tab.
5. Select the accounts you want to erase data from. You can include All GL Accounts, All Custom Accounts, Cube Accounts on sheet or create a new account parameter to erase specific accounts. You can also select a combination of all the available account options.
6. Specify levels for erasing data. You can select all levels or create a new level parameter for specific levels.
7. Run the loader manually using Erase Manually in the Actions pane or schedule the loader to run as a part of a task. If there is more than one planning loader within a task, then each of the erase options are available for each included loader. The options are tagged with the name of the loader to help identify the source of the erase option.

Erase Manually

Release: 2021-03-12

We add a new Erase Manually option in the Actions section on the Planning Data Loader, enabling you to erase data without running the loader.

Explore Cell Details

We update the Explore Cell functionality to provide you with more relevant data as you analyze your plans.

View Splits and Drill into Transactions

Release: 2021-03-12

For instances with access rules, we now enable you to view supporting details when you access the Explore Cell window from:

- Charts in Dashboards
- OfficeConnect
- Reports

In the Explore Cell window, we now provide:

- A Drill into Transaction link (secured to the Access Transaction permission), which you can only use in Adaptive Planning instances with the transactions module.
- Splits in standard accounts.

Example: You can split data in the Expense account by vendor. If you have access to only 1 vendor, when you launch the Explore Cell window, you can now see only the split data entered for the vendor you have access to. Also, if the data has associated transactions, you can click the Drill into Transaction link to view supporting data that you have access to.

See [Drill Down and Drill Through](#).

External Systems in Adaptive Planning Integration

We improve External Systems in Adaptive Planning Integration. You can now reorder tuple concatenations for Workday and NetSuite external systems, making it faster and easier to configure tuples that match how your reports deliver data.

Reorder Tuples in External Systems

Release: 2021-03-12

You no longer need to alphabetically order tuple concatenations for accounts, levels, and dimensions. Instead, we now enable you to reorder the columns to match the configurations of your Workday or NetSuite data sources.

Note: If you reorder concatenations, the new order must match the configurations of your Workday or NetSuite data sources.

See [Set Up a NetSuite External System for Drill Through](#), [Set Up Workday External Systems for Adaptive Planning](#).

Import and Export Formula Overrides

To save you time and manual effort, we now enable you to mass import and export formula overrides for calculated accounts in the Modeling area.

Import Formula Overrides

Release: 2021-05-14

We update the Import button in the toolbar on the admin pages for:

- Cube accounts.
- Custom accounts.
- General ledger accounts.
- Metric accounts.
- Modeled accounts.

When you select the button, we now display a drop-down list that contains:

- A new *Import Override Formulas* option, enabling you to mass update and append formula overrides.

- The *Import Account Structure* option.

We also deliver a new Override Formula Import template, which you can download when you import formula overrides.

See [Import and Export Accounts](#).

Export Formula Overrides

Release: 2021-05-14

We update the Generate Printable View button in the toolbar on the admin pages for:

- Cube accounts.
- Custom accounts.
- General ledger accounts.
- Metric accounts.
- Modeled accounts.

When you select the button, we now display a drop-down list that contains:

- A new *Export Override Formulas* option, enabling you to download all formula overrides so that you can mass review and import changes.
- The *Export Account Structure* option in the new drop-down list.

See [Import and Export Accounts](#).

Import Cube and Modeled Accounts

With this release, you can now import and update cube and modeled accounts, saving you time and manual effort.

Watch the video: 4m 30s

Import Account Structure

Release: 2021-03-12

We deliver a new Import account structure button in the cube and modeled sheet builders, enabling you to:

- Append cube and modeled accounts.
- Download a template file.
- Choose a file to upload.
- Update cube and modeled accounts.

See [Import and Export Accounts](#).

Korean Language Support

We expand our local language support by adding Korean to Adaptive Planning.

Korean Language Support

Release: 2021-03-12

We now support displaying all text in Korean throughout:

- Planning
- Dashboards
- Knowledge Center

To enable this functionality, you must update your browser language to Korean.

See [Technology Requirements](#).

Linked Accounts

With this release, we update linked accounts to provide greater flexibility and to support cube sheets for multi-dimensional profit and loss (P&L).

Watch the video: 6m 48s

Note: We only provide these new capabilities in the account administration pages of Modeling. We do not update related APIs, spreadsheet imports, or the import templates.

Link to Multiple Source Accounts

Release: 2021-05-14

You can now add multiple source accounts to linked accounts. This enables you to combine data gathered from multiple sheets, simplifying your account hierarchies.

To support adding multiple source accounts, we remove the Links To prompts in the Account Details section. Instead, we deliver a new field that enables you to easily maintain a list of source accounts.

Also, we now enable you to:

- Add or change a filter for a source account when you add a new link or when you select a source account in the new field.
- View link filters for a source account when you select a source account in the new field.

See:

- [Add Links or Link Overrides to Accounts](#) .
- [Example: Multi-Source Linked Accounts with Applied Dimensions](#).

Links to multiple source accounts are not supported on NetSuite Basic (OEM) enabled instances.

Flip the Sign of Source Data

Release: 2021-05-14

On linked accounts, we add a new Change Sign +/- check box for linked account sources in the Account Details section, enabling you to change between credits and debits for the destination account.

You can use the Change Signs +/- check box when you:

- Add a new source account.
- Select the account in the new Links To field.

Example: You plan for an accumulated depreciation account as a positive value in a modeled sheet. In the general ledger account that you link to the modeled account, you can use the Change Signs +/- check box to pull the modeled sheet data into the general ledger account as a negative.

See .

Cube Entered Account Links

Release: 2021-05-14

We now enable you to add linked general ledger and custom accounts to cube sheets. In the settings for the general ledger and custom accounts, you can now select both of these options:

- *Cube* for the Data Entry Sheet Type setting.
- *Link* for the Type setting.

Also, you can now use the *Link* type for general ledger and custom accounts that you previously added to cube sheets. This enables you to change general ledger or custom accounts into link accounts in the cube sheet account settings.

We also automatically update your cube sheet account settings with the same settings you configure for linked accounts, enabling you to:

- Add a dimension tag.
- Create the links to source accounts.
- Filter the links by dimensions.

See:

- [Concept: Cube-Entered Accounts](#)
- [Reference: Cube-Entered Account Settings](#)

Apply Dimension Values to Linked Accounts

Release: 2021-05-14

Workday now enables you to add a dimension value to a linked account and apply that value to the linked data. You can select the dimension value for a linked account in the Account Details section. This increases flexibility by enabling you to apply dimensionality to uncategorized linked data.

See:

- [Add Links or Link Overrides to Accounts](#) .
- [Example: Multi-Source Linked Accounts with Applied Dimensions](#).

Maintain and Calculate Access Rules

We continue to improve access rule functionality. You can now use account and dimension attributes to create dynamic access rules, making it easier to manage your access rules. We also provide a new tool to calculate user access based on existing rules.

Watch the video: 3m 44s

Use Attributes for Access Rules

Release: 2021-03-12

With this update, we rename the Add Dimensions button in the access rule toolbar to Add.

When you click the button, we update the popup window to now include attributes under their dimensions, enabling you to include attributes in the access rules. You can use attributes to grant access only to the values tagged with attributes.

This enables you to then update attribute tagging without having to update the access rules.

See [Create Dynamic Access Rules](#).

User Access Calculator

Release: 2021-03-12

We deliver a new User Access Calculator page that you can access from the Users and Roles section on the Administration page. This enables you to select a user and then calculate the user's access, making it easier to audit, troubleshoot, and understand the affects of access rules on each user.

On the new page, we display a new:

- Single Coordinate option, enabling you to check the user's access to a specific intersection.
- Single Dimension option, enabling you to see if the user has access to the specific dimension at some intersections.

See [Calculate the Access of Users](#).

Access Rules for All New Adaptive Planning Instances

Release: 2021-04-05

We update the access rule security structure for all new instances of Adaptive Planning for finance, sales, and workforce planning.

Now, when you create a new model, we provide you with at least:

- 1 user: [admin@instancecode.com](#). We automatically assign the user ownership of all available levels.
- 1 permission set: Full Seat, which comes with most of the available permissions. We automatically assign the permission set to the admin user.
- 1 user group: Level Owners.
- 2 access rules: 1 rule grants the Level Owners with group access to all owned levels. The other rule grants the admin user with access to all data in the model.

You can add more users to the group to give them access to all their owned levels, or you can create groups and rules for other users.

See [Access Rule Security](#), [Create Access Rules](#) and [Concept: Access Rules](#).

Maintain Dimension and Attribute Values

We make it easier to maintain custom dimensions and dimension values, improving the user experience.

Add Dimension and Attribute Value Options in Cube Sheet Builder

Release: 2021-03-12

We add a new cube sheet setting for dimensions and attributes, enabling you control how newly added dimension and attribute values affect the cube sheet.

For each dimension and attribute on the cube sheet, you can choose when the cube sheet treats newly added dimension and attribute values:

- *Unavailable in sheet*
- *Immediately available in sheet*
- *Only available when the parent's available in sheet*

See [Reference: Column Properties for Cube Sheets](#).

Remove Unused Dimension Values in Bulk

Release: 2021-06-11

You can now select a new Remove option when you import a dimension structure in the Dimension Admin page. The Remove option only deletes unused dimension values in your import file. You must contact support to enable the Remove option.

Note: You can't remove a parent dimension value that currently has a child dimension value in use.

See [Import Attributes](#), [Custom Dimensions](#), and [Dimension Mappings](#).

Merged Cube Sheets

Important: We revert this functionality from production on 2021-05-28. We plan to redeliver it in a future update. If you already enabled this feature, you can continue using it.

With this release, we enable you to merge up to 3 modeled or cube sheets, saving you time and manual effort. When you merge the sheets, we automatically initiate cube calculations based on the presence information for the source sheet.

Watch the video: 5m 5s

Create Merged Cube Sheets

Release: 2021-03-12

Now, when you create cube sheets, we provide a new Create as Merged Cube check box.

Also, in the Settings tab on the sheet properties, we now display selection boxes for source sheets, enabling you to choose from available modeled sheets and cube sheets. You can choose up to 3 sheets.

See:

- [Concept: Merged Cube Sheets](#)
- [Steps: Build Cube and Merged Cube Sheets.](#)
- [Example Steps: Build a Merged Cube Sheet for Revenue by Product and Customer](#)

Merged Cube Sheet Dimensions

Release: 2021-03-12

We now filter the available custom dimensions to include only those already added to the source sheets. We also add the attributes of the available custom dimensions.

We automatically add any common dimensions to the canvas. Example: When all sheets contain the same dimension, we add that dimension to the canvas as a required dimension.

See:

- [Concept: Merged Cube Sheets](#)
- [Steps: Build Cube and Merged Cube Sheets](#)
- [Example Steps: Build a Merged Cube Sheet for Revenue by Product and Customer](#)

Merged Cube Sheet Accounts

Release: 2021-03-12

You can add these accounts to merged cube sheets:

- Cube calculated. You must select at least 1.
- Cube metric.
- Cube account groups.

The formulas of cube calculated accounts in a merged cube sheet must no longer evaluate to zero when the other accounts of the cube are zero. Instead, the data presence in the source sheets determines the intersections for the calculations.

See:

- [Concept: Merged Cube Sheets](#)
- [Steps: Build Cube and Merged Cube Sheets](#)
- [Example Steps: Build a Merged Cube Sheet for Revenue by Product and Customer](#)

Available in Production Instances

Release: 2021-05-14

You can now request to enable merged cube sheets in your production instances.

NetSuite 2020.1 Web Services

NetSuite 2020.1 Web Services Support

Release: 2021-03-12

We add a new Upgrade to 2020.1 link in the Actions pane, and remove the Upgrade to 2018.1 link. This enables you to select an existing token based credential from the Components library or create a new token based credential during the upgrade process. This update helps enforce Token Based Authentication (TBA) for all NetSuite users, maintaining our Built For NetSuite (BFN) certification.

This update is not automatic for existing NetSuite data sources. You must manually upgrade your existing NetSuite Data Sources to 2020.1.

You must use a web service version that is less than 3 years old to ensure Workday and NetSuite are able to provide optimal support.

Use the HMAC-SHA256 signature with NetSuite 2021.2

Release: 2021-03-12

With NetSuite 2021.2, any integrations that use the Token-based Authentication (TBA) feature with HMAC-SHA1 as a signature method will stop working. With the Workday 2021 R1, we now support the HMAC-SHA256 signature for Token Based Authentication.

Ensure you use the latest version of the NetSuite Data Source (NetSuite 2020.1). This applies to all integrations you create, as well as integrations from the third-party solution providers.

NetSuite targets its 2021.2 release upgrade between August and October of 2021. If you use any integrations provided by a third party, inform the third party that the HMAC-SHA1 will no longer be supported as a signature method for TBA in NetSuite. The third party must provide you with an updated solution before the NetSuite 2021.2 release.

Upcoming Changes for Improved User Experience

We will enhance the Netsuite-Workday Adaptive Planning user experience in an upcoming release by opening the planning application in a new browser tab, so users can take advantage of the full-browser experience.

Note: Your browser pop-up blocker may prevent this page from loading. Enable pop-ups for this page and try again. If a new tab does not open, try re-launching Workday Adaptive Planning

NetSuite Embedded

Improved User Experience

Release Date: 2021-05-14

We enhance the Netsuite-Workday Adaptive Planning user experience when using the NetSuite Financial Planning tab, by opening the planning application in a new browser tab. This allows users to take advantage of the full-browser experience.

Note: Your browser pop-up blocker may prevent this page from loading. Enable pop-ups for this page and try again. If a new tab does not open, try re-launching Workday Adaptive Planning

OfficeConnect Ad Hoc Analysis

With this release, we improve OfficeConnect ad hoc analysis functionality. We enable users to quickly analyze reporting data by viewing the details using different expansion options. Also, users can apply and expand custom dimensions and attributes in reports.

Watch the video: 4m 20s

Apply and Expand Custom Dimensions and Attributes

Release: 2021-03-12

You can now apply and expand all parent custom dimensions and attributes.

See [Steps: Explore Reports Using Ad Hoc Analysis](#).

Select the Direction for Expanding Parent Elements

Release: 2021-03-12

We now enable you to take these actions on parent elements for all reports or a single report:

- Expand columns to the left or right of the parent.
- Expand rows above or below the parent.

See [Steps: Explore Reports Using Ad Hoc Analysis](#).

Expand All or Expand to Leaf Level

Release: 2021-03-12

You can now expand all parent elements including all descendants. We also enable you to expand all parent elements to the leaf level only. This makes it easier to access the rows where you need to enter data.

See [Steps: Explore Reports Using Ad Hoc Analysis](#).

Focus on Parts of an Expansion

Release: 2021-03-12

We now enable you to focus on specific rows or columns of an expansion by hiding the other rows or columns. You can select specific rows or columns that are part of an expansion and then select the:

- Keep Only option to show only the selection and remove other parts of the expansion.
- Remove Only option to remove the selection from the expansion.

Note: When you use either option, we shift the data so that the remaining rows or columns are no longer an expansion.

See [Steps: Explore Reports Using Ad Hoc Analysis](#).

Planning Data Source

We update the Planning data source to save you time and effort. We now enable you to add new dimension and version filters, access local parameters during run time for loaders and tasks, and specify the external version values to be used at runtime while importing data. Also, you can use the data source to automatically authorize the current user.

Include Roll up Data

Release: 2021-03-12

You can now include account and level rollups for custom and cube sheets source in Manage Sources > Settings by selecting:

- Include Account Rollups
- Include Level Rollups

Account rollups are enabled by default for any preexisting or new Planning Data Sources. Level rollups are disabled by default.

See [Set Up Adaptive Planning as a Data Source](#).

Additional Filters

Release: 2021-03-12

You can now add an optional dimension parameter to your Dimension source using the Manage Sources in Actions section.

When you select the dimension filter parameter, the import dimension data only returns the filtered dimensions based on the dimension filter. You can:

- Only select the External Dimension parameter if your Planning credential is connected to an external instance.
- Select the Shared Dimension parameter if your Planning credential is connected to a self instance.

When you select the version filter parameter, the import dimension data only returns the filtered dimensions based on the version filter. You can:

- Only select the External Version parameter if your Planning credential is connected to external instance.
- Select the Shared Actuals Version parameter or shared Plan Version if your Planning credential is connected to self instance.

Note: We don't automatically select any dimension parameters.

See [Set Up Adaptive Planning as a Data Source](#).

Shared Parameters

Release: 2021-03-12

You can now select shared parameters when your planning credential is connected to your local instance. This enables you to reuse the available shared parameters for other data sources.

See [Set Up Adaptive Planning as a Data Source](#).

Automatically Authorize Users

Release: 2021-03-12

You can now enable Workday to authorize the current user for the Planning Data Source credential, saving them time by no longer requiring them to enter their information twice.

Note: To enable this functionality, you must select the Use Currently Logged in User option in the Adaptive credential setup.

See [Set Up Adaptive Planning as a Data Source](#).

Runtime Parameters

Release: 2021-03-12

You can now change the External Version parameter at runtime to return filtered data and run Import Data with the updated filter value.

Example: When you set the Version filter for a Sheet source to be an External Version parameter and run Import Data, we populate the Plan Version drop down list with versions that were available during the external version configuration.

See [Set Up Adaptive Planning as a Data Source](#).

Import Data

Release: 2021-03-12

We update the Planning data source to no longer import the structure when you run the Import Data integration. If you change the structure, we return an error when you run the Import Data integration.

To update the structure, you must run the Import Structure integration before you run the Import Data integration.

See [Set Up Adaptive Planning as a Data Source](#).

Planning Data Source Stratum

You can now aggregate transactional data by time stratum in your Planning Data Source.

Aggregate Data by Stratum

Release: 2021-03-12

You can now configure time stratum aggregation for cube sheets or custom sources. Select Aggregation Stratum in Manage Sources > Settings from your current instance and aggregate data by any time stratum available in the current instance. If you don't select a stratum, your data source will behave the same as before.

If your selected stratum is no longer available or your Planning time strata changed, an error occurs during run time when you select Import Data or Run Manually from the loader or as a part of a task.

Redesign for Sheets Overview and Explore Cell

Contains preview content available only to customers invited to test a new offering or capability. Do not share.

Sheets Overview

Release: 2021-03-12

We've made some changes to the Sheets Overview.

Navigation Section	Access either level-assigned sheets or user-assigned sheets from the new navigation section on the left. Click the arrow to collapse or expand the section.
Search and Sort	- Type keywords in the new Search field to find sheets. - Click the Name header to sort the list of sheets in descending alphabetical order. Click again to switch to ascending, and click again to revert to the order set by your admin.
Level Drop-Down	It looks a bit different, but works the same. If you use elimination levels, you'll notice the new elimination level icon.
Search Cell Notes and Audit Trail	Click the More icon from the toolbar on the right to select <i>Search Cell Notes</i> <i>Search Audit Trail</i>
Change Workflow Status	For models with Workflow and users with Workflow permissions we provide a new interface for Workflow status updates: For level-assigned sheets, click the status from the toolbar. The Level Workflow Status section opens on the right.

	- For user-assigned sheets, click the status next to sheet name. The Sheet Workflow Status opens on the right. - For user-assigned sheets, you can also sort by Workflow status: click the Workflow Status header. From the Level and Sheet Workflow Status section, you can: - See who last updated the status. - Add a note. - Change the status (if you have the permissions).
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Explore Cell

Release: 2021-03-12

We've rearranged the information to make it easier to find the details.

Upper Left	- The cell value. - Links to the sheets that show the value. - Links to audit trail and drill capabilities.
Upper Right	Details about: - Account - Levels - Time - Arrows to click to the previous and next time period
Bottom Half	The bottom half contains the contributing details, including source accounts, formulas, and sources of contributing values.

Required Columns on Modeled Sheets

We now enable you to require specific columns on modeled sheets, helping to ensure that the plans contain all the data you need to accurately budget and forecast.

Note: To enable required dimension column you must submit an Account provisioning ticket.

Required Column Check Box

Release: 2021-03-12

We provide a new Required Column check box in the General Properties section of custom dimension columns when you maintain modeled sheets, enabling you to configure which columns are required.

Also, when you use the sheet in the Sheets section, we highlight rows containing an empty required field. For Excel Interface for Planning, we don't:

- Highlight rows that contain an empty required field.
- Require columns when you add new rows.

We also don't require columns for manual imports and integrations.

See [Steps: Build Modeled Sheets](#).

Required Modeled Sheet Columns in APIs

Release: 2021-03-12

A new `requiredColumn` attribute for Dimension tags indicates when a modeled sheet column requires a dimension value selection before users can save the sheet. This attribute becomes available in API v27 for:

- `importModeledSheet`
- `exportModeledSheet`

See [importModeledSheet](#), [exportModeledSheet](#).

Retain Metadata Order in Adaptive Planning Integration

When you import elements using integrations, we now enable you to retain the order of the metadata in Adaptive Planning. This improves the user experience when managing accounts, attributes, dimensions, and levels.

Maintain Existing Order in Loaders

Release: 03-12-2021

We now enable you to maintain the sort order of Adaptive Planning when you use the Planning Account and Level Loaders. We add a new Maintain Existing Order in Planning check box on the Data Source Settings tab in the loaders.

We automatically select the new check box for new loaders. To preserve the behavior of any existing account and level loaders, we recommend that you don't select the new check box.

See [Create Planning Level Loaders](#), [Create Planning Account Loaders](#).

Retain Existing Order in APIs

Release: 03-12-2021

We deliver a new `retainExistingOrder` attribute for these metadata bulk APIs:

- `updateAccounts`
- `updateDimensions`
- `updateAttributes`
- `updateLevels`

This enables you to import metadata elements without altering how Adaptive Planning already sorts the order.

See [updateAccounts](#), [updateDimensions](#), [updateAttributes](#), [updateLevels](#).

Sheets on Dashboard

We improve usability of sheets on dashboards by delivering a more consistent user experience and enabling quicker access to data.

Maximize Sheets on Dashboard

Release: 2021-03-12

You can now use the perspective toolbar when you maximize sheets on dashboards, persisting all your context filter selections.

In the maximized mode, filters common to both perspective toolbar and the sheet are disabled in the sheet and in the Change Dimensions section. You can change these filters only in the perspective toolbar.

Workday Data Source for Adaptive Planning

Import Multi Instance Objects

Release: 2021-03-12

When you select reports from Workday in the Workday Data Source, you can now update multi-instance field behavior to flatten and unpivot the data for consumption by Adaptive Planning.

We recommend that you do this for reports that contain 1 multi-instance object. For multiple multi-instance objects you must create Extract Single Instance calculations.

See [Select Workday Reports for Workday Data Sources in Adaptive Planning](#).

Workforce Planning Actions

We continue to streamline your ability to create positions in HCM from an approved workforce action plan in Adaptive Planning. Now, we enable you to immediately create positions in HCM when you publish your workforce action plan, reducing the amount of manual effort. You can also publish directly from the filtered rows of a modeled sheet in Adaptive Planning so that you can view your plan as you publish.

See [Steps: Publish Workforce Planning Actions from Adaptive Planning](#).

Publish Workforce Actions

Release: 2021-03-12

When you publish a workforce plan, we now enable you to either:

- Manually review and edit the proposed new positions in HCM.
- Skip manual review.

To skip manual review, you can initiate the Create Position business process from a workforce plan by selecting the Expedite Workforce Action option when you publish the plan.

We also add a new Publish action on the modeled sheet that you can use to view which modeled rows you are about to publish.

Note: You can configure Workforce Action mapping in the modeled sheet setup.

See [Publish Workforce Planning Actions from Adaptive Planning](#).

Review Workforce Planning Actions Task

Release: 2021-03-12

We deliver a new Review Workforce Planning Actions task (secured to the Process: Workforce Action Plan domain) that you can use to enter the information needed to create the planned positions in your organizations.

Note: To use the new task, you must also be part of a security group that's assigned to the initiating action on the business process security policy for the Create Position business process.

See [Review Workforce Planning Actions](#).

Workforce Planning Action Event Business Process

Release: 2021-03-12

We add a new Workforce Planning Action Event business process (secured to the Adaptive Planning for Headcount Plans functional area).

We also deliver a new Import Workforce Planning Actions web service (secured to the Adaptive Planning for Headcount Plans functional area) as an initiating action on the new business process. When you

publish workforce planning action plans from a modeled sheet in Adaptive Planning, we automatically initiate the new web service.

Note: You must set up the business process using the Create Business Process Definition (Default Definition) task before you can use it. If you plan to publish using the Skip Review button, we recommend that you set up this business process with a routing rule condition for processes initiated from Adaptive Planning.

See [Steps: Set Up Security for Adaptive Planning](#).

View Workforce Planning Actions Report

Release: 2021-03-12

We deliver a new View Workforce Planning Actions report (secured to the Reports: Workforce Action Plan domain), enabling you to review the workforce planning actions that you publish from your modeled sheet in Adaptive Planning for your organizations. You can access the report for each publish from a publish history link in Adaptive Planning.

See [Steps: Publish Workforce Planning Actions from Adaptive Planning](#).

Plan Dimensions/Hierarchies Report

Release: 2021-03-12

On the Plan Dimensions/Hierarchies Report, we add these new options in the Non Worktag Plan Dimension Type prompt category on the Dimension Type prompt that you can use to load the dimensions for your workforce action plans:

- Difficulty to Fill
- Reason
- Worker Sub-Type

See [Steps: Publish Workforce Planning Actions from Adaptive Planning](#).

Workforce Planning Action Event Report Field

Release: 2021-03-12

We deliver a new Workforce Planning Action Event report field on a new Workforce Action Event business object (secured to the Public Reporting Items domain) that you can use in condition rules and custom reports to identify which positions were created from a published workforce action plan.

Reports: Headcount Plan (Adaptive Planning) Domain

Release: 2021-03-12

With this update, we deliver a new Reports: Headcount Plan (Adaptive Planning) domain that you can use to secure access to reports about Adaptive Planning headcount plans. This provides a more secure way to grant access to headcount plan reports and workforce planning reports.

Note: Workday automatically converts the security groups on the Reports: Workforce Action Plan domain and adds them on the new Reports: Headcount Plan (Adaptive Planning) domain.

See [Steps: Set Up Security for Adaptive Planning](#).

Headcount Planning (Adaptive Planning) Subreports

Release: 2021-03-12

For consistency, we now secure these reports to the new Reports: Headcount Plan (Adaptive Planning) domain, instead of to the Reports: Workforce Action Plan domain:

- Plan Report Sub Report for Cost of Workforce

- Plan Report Sub Report for FTE Cost
- Plan Report Sub Report for HC Cost
- Plan Report Sub Report for HCM and Planning

See [Steps: Set Up Security for Adaptive Planning](#).

Headcount Plan Lines for Organization Report Data Source Filter

Release: 2021-03-12

For consistency, we now secure the Headcount Plan Lines for Organization report data source filter to the new Reports: Headcount Plan (Adaptive Planning) domain, instead of to the Reports: Workforce Action Plan domain.

See [Steps: Set Up Security for Adaptive Planning](#).

Plan Lines for Financial Reporting Report Data Source

Release: 2021-03-12

For consistency, we now secure the Plan Lines for Financial Reporting report data source to the new Reports: Headcount Plan (Adaptive Planning) domain in addition to its existing domain.

See [Steps: Set Up Security for Adaptive Planning](#).

Approved New Positions Report

Release: 2021-03-12

In preparation for its retirement in a future update, we append (Do Not Use) to the name of the Approved New Positions report.

2020R2 Release Notes

2020R2 Release Notes

[2020R2 Feature Overview - General Availability Recorded Session](#)

Introducing Intelligent Planning

With this release, we introduce intelligent planning for anomaly detection and outlier reporting. This enables you to quickly identify outliers by general ledger accounts in standard sheets. This also enables you to compare the machine learning predictions against your plans and budgets to analyze and create more robust and accurate models.

Watch the video: 6m 19s

See [Steps: Set Up Intelligent Planning](#) and [FAQ: Intelligent Planning](#).

Machine Learning Prediction Version

Release: 2020-09-11

You can now enable machine learning for anomaly detection and outlier reporting.

Note: To enable this functionality, you must:

- Create a forecast version with the name AIML-FORECAST, which holds the predictive values, and then
- Submit a support ticket to request anomaly detection and outlier reporting.

See [Create Prediction Versions for Intelligent Planning](#).

Anomaly Detection in Sheets

Release: 2020-09-11

To enable you to detect outliers and unexpected data, we deliver a new Detect Anomalies button on standard sheets. When you use the button, we compare this data against the predictions:

- General ledger and custom account data.
- Standard sheets.
- Plan versions.
- Web sheets, not Excel Interface for Planning sheets.

If a value falls outside of the predicted range, we highlight the cell to alert you to a possible anomaly.

Note: We don't detect anomalies for individual splits, or rollups for time, levels, or dimension.

See [Detect Anomalies in Sheets](#).

Outlier Reporting

Release: 2020-09-11

We now enable you to quickly analyze variances between your plan data and the predicted version. You can create a matrix report with the prediction version and 1 or more plan versions. You can also use report calculations to display the variance and then define your own outliers with conditional formatting.

See [Steps: Build Outlier Reports](#).

Workforce Planning: Create Positions from Plans for HCM

Release Date: 2020-09-11

You can now publish the information you gathered in the Positions modeled sheet of your workforce planning instance to Workday HCM.

- Use the new Workforce Action publishing option to select the Positions sheet.
- Find the published data in the Workday Approved New Positions report.
- Generate a workbook where you can modify details and approve each planned position.
- Submit the workbook to mass produce the positions in HCM.

Creating positions updates the Approved New Positions report with a status for each row and a Position ID for each created position. Use the Adaptive Planning data loaders to import data from the updated report back to the modeled sheet. The loaders update only the appropriate rows, syncing HCM positions details with the Adaptive Planning Positions sheet.

See [Concept: Publish Plans from Adaptive Planning](#)

Workforce Planning: Drill into Position Detail from Modeled Sheets

Release: 2020-09-11

You can now drill into positions from modeled sheets with mapped dimensions. Click the related actions icon in the Cell Explorer or right-click context menu in the sheet to navigate to the Convenience view.

See [Drill Down and Through](#)

Adaptive Planning User Experience

We continue to update Adaptive Planning to provide a more consistent user experience with Workday.

Adaptive Planning

Release: 2020-09-11

We rename the Adaptive Insights product to Adaptive Planning.

Knowledge Center

Release: 2020-09-11

We rename the Knowledge Center to Workday Adaptive Planning.

Changes to User Interface

Release: 2020-09-11

To provide a more consistent user experience, we update the Adaptive Planning user interface by now:

- Displaying the Workday logo in the upper left corner, which you can click to open the navigation menu.
- Updating the login page, Welcome page, Home page, and email notifications to more closely resemble the Workday user interface.
- Updating the user interface with cleaner lines in the top menu bar, including the breadcrumbs, version selector, profile icons, and help icons.

Set Your Adaptive Planning Home Page

Release: 2020-09-11

You can no longer access the Adaptive Planning Home page from the Welcome page. Instead, you can now access the Home page from your profile and the navigation menu.

Profile Menu

Release: 2020-09-11

We reorganize and rename the options that display when you click your profile avatar in the top menu.

We update these to provide a cleaner user experience:

- Active Users icons (available for stand-alone Adaptive Planning customers).
- Product Documentation links.

We rename the:

- Settings button to View Profile.
- Logout button to Sign Out.

Upload Company Logo

Release: 2020-09-11

If you use Adaptive Planning and other Workday products, you can no longer upload your company logo using the Visual Preferences.

Version Icons

Release: 2020-09-11

We update the version icons in the version drop-down for all areas of a model. You can also view the new icons when you access the version list by selecting Modeling > Versions.

User Experience: Reporting Dashboards

Release: 2020-09-11

With this release, we update reporting dashboard functionality to provide a more intuitive user experience.

You can now access your existing reporting dashboards from the Announcements option on the main navigation menu by selecting Modeling > Model Management > Others > Announcement Pages.

This helps to more clearly differentiate the reporting dashboard functionality from the Dashboards capability.

User Experience: Share Adaptive Planning Reports

Release: 2020-09-11

We enhance sharing functionality for reports in Adaptive Planning. For better usability, we now enable you to share web reports with specific users or user groups. You can still continue to share reports by level access.

Also, your users can now view empty reports that you share with them. When they run an empty report, we don't display any data.

See [Share Reports](#).

Dashboards: Geo Map Conditional Formatting

Intended Release: 2020-10-09

You can now use conditional formatting to override the color of data points that meet certain conditions. For each rule, you can create a conditional formatting expression and associate a data series.

See:

[Create Geo Maps](#)

[Concept: Conditional Formatting for Charts](#)

[Reference: Operators and Functions for Conditional Formatting](#)

Dashboards: Personal Sheet Preferences on Dashboards

Watch the video: 5m 2s

You can now save your view preferences for individual sheets on dashboards. For a better user experience, we also improve the perspective context filters

Save View Preferences for Sheets on Dashboards

Release: 2020-09-11

Customize and save your view preferences for each individual sheet on a dashboard. Before you could only make temporary view changes that revert when you navigate away from the page or make changes at the perspective level. Now any view change including column size and swap columns and rows save when you:

- Update Display Options.
- Change Dimensions in cube sheets.
- Save after data entry.

Set the default sheet view for all users when you share or publish perspectives. Users can then modify their sheet view preferences and even save a new default view from Display Options. When you publish a perspective you revert all custom view changes made by users to the current view.

See [Concept: Sheet Views](#).

Perspective Context Filter Behavior Changes

Release: 2020-09-11

Perspective context filters are now visible when you maximize all charts except sheets, and filter options react to element selections. When you select a level attribute or dimension attribute context filter, the

available levels and dimension context filters only show selections relevant to the element filter. Cube and modeled sheets now react to level and dimension attribute perspective filter changes.

OfficeConnect: Ad Hoc Analysis

Watch the video: 4m 25s

We enable you to expand the parent elements in a report, enabling you to view and analyze the underlying child elements in context. You can also now collapse the expanded elements to view the roll-up. You can now expand and collapse the rows and columns in your reports to see or hide the underlying children for multiple parent elements.

Also, we now enable you to view the details while you maintain the column or row structure and the Excel formulas.

Example: You can expand the Revenue account and the U.S. level to analyze how the subcategories of revenue compare across the different U.S. levels.

Release: 2020-09-11

See [Ad Hoc Analysis](#)

Example: [Expand Report Elements for Ad Hoc Analysis](#)

OfficeConnect: Manage Element Groups

Watch the video: 3m 51s

We improve how you maintain element groups by now enabling you to view and edit them in a single location.

We add a new Manage Groups option that you can use to view, navigate, and edit all element groups in your reports.

To enable us to display the changes on your reports, when you select the Refresh option, we now also automatically select the Update Groups option. This reduces clicks to save you time and effort.

Also, you can now create element groups from the elements already applied on your reports.

Release: 2020-9-11

See [Create and Manage Element Groups](#)

Example: [Use Element Groups to Update Reports](#)

Data Access: Create Dynamic Access Rules

When you create dynamic access rules, the rules update automatically as you update your model. Leverage new capabilities to save time.

Watch the video: 4m 30s

Level-Ownership for Access Rules

Release: 2020-09-11

When you create access rules using owned levels, the rules now dynamically update when you change the level ownership of users. You can also use the shortcut as a single main access rule that still provides level-differentiated access, or as a base to create more-simply defined rules for groups and users.

Note: In your list of access rules, a tilde indicates that the rule is based on level ownership.

See [Create Dynamic Access Rules](#).

Updated Access Rule Template

Release: 2020-09-11

You can now enter a tilde in the Level (Grant) column on the access rule template. This enables a user, or all users in the group, access to the levels they own, automatically including the level's child levels. When you update a user's owned levels, we also automatically update their rules.

See [Create Dynamic Access Rules](#).

Level Attributes for Access Rules

Release: 2020-11-13

Now you can add level attributes to your secured dimensions. Then use them to create access rules. The rules that grant access to level attributes dynamically update when you add or update the level attribute values in your model.

As an example, you can grant view access to all owned levels. Then grant edit access to specific level attribute values. The user can only edit owned levels that are also tagged with the attribute values.

Note: Note: Using level attributes in rules does not protect level attribute values. All users can view and select level attributes in sheets, reports, and charts. Using level attributes in rules is a way to simplify rule creation and fine-tune level access.

See [Create Dynamic Access Rules](#).

Change Add Dimensions Button to Add

Release: 2020-11-13

In the access rule toolbar, we change the Add Dimension button to Add.

Updated Access Rule Template

Release: 2020-11-13

If you choose to secure level attributes, the template now includes (Grant) and (Grant All Except) columns for level attributes. You can list the attribute values in either column, but not both. The attribute value can only give access to levels tagged with the attribute value if the user also has access to the level.

See [Create Dynamic Access Rules](#).

Modeling: Version-Specific Account Formulas

With 2020R2, you can add account settings that save different account formulas for each version. You can also override the default and lock the version data for the account. This helps to protect data in locked versions as well as remove the need for version references in account formulas.

Watch the video: 6m 19s

Formula Version Selector and Override Option

Release: 2020-09-11

We add a new Formula Version selector and a new Override option in the account settings, enabling you to create an override account formula for a specific version without affecting other versions and their data.

Also, when you lock a version, we convert all account formulas to override formulas.

See [Edit Account Formulas and Override Formulas](#).

Override Checkbox Update

Release: 2020-10-09

To make it easier to maintain account settings, we remove the Override check box from the Data Type section. Instead, we deliver a new Override Formula Setting dropdown.

From the new dropdown, when you select:

- Override Formula, you can add, edit or delete the override for all unlocked versions.
- None, you can add, edit, or delete the default formula for all unlocked versions.

See [Edit Account Formulas and Override Formulas](#).

Modeling: Maintain Shared Formulas

With 2020R2, we deliver more import options that you can use to mass create and edit shared formulas, saving you time and effort. We also improve exported files for greater usability.

Watch the video: 2m 37s

Update and Append Import Option

Release: 2020-09-11

When the level and account match the existing formula, you can use a new Update and Append option that enables you to:

- Delete shared formulas if you leave the formula column blank.
- Replace shared formulas if you enter a new formula.

You can also use the option to add shared formulas when the level and account don't match the existing formula and you enter a formula.

See [Import and Export Shared Formulas](#).

Export to CVS File

Release: 2020-09-11

We now automatically download the formulas a CSV file on your local drive when the rows exceed 1 million. This helps to improve performance by preventing Excel failures.

Modeling: Derived Dimension Values on Modeled Sheet Rows

Watch the video: 5m 28s

Release: 2020-09-11

Derived dimension values let you dynamically group data based on user-defined multi-dimensional lookup rules. Dimension values in modeled sheet rows are returned based on your rules.

Derived dimension values help you plan at a high-level with aggregate data, while giving you the flexibility to make adjustments at the individual item level.

You can now use derived dimension values to dynamically group data based on user-defined, multi-dimensional lookup rules. This enables you to analyze possible impacts when planning key performance indicators based on new groupings. To save you time and effort, we also populate the derived dimension values on modeled sheets based on the rules you configure.

See:

- [Enable Dimension Mapping for Custom Dimensions](#).
- [Add Dimension Mapping Tables in Dashboards](#).
- [Add Mapping Rules for Derived Dimensions](#).

Small but Noteworthy

Release: 2020-09-11

Update for sales planning customers that use derived dimensions.

- Search in dimension mapping tables on dashboards.
- Dimension mapping tables react to perspective context filters.
- Move mapping values between rows in your dimension mapping table.
- Derived dimensions can now be secured with access rules.
- Import and export dimension mapping rules and download the template.

Workday Using Adaptive Planning: Publish Financial Plans

Release: 2020-09-11

You can now publish financial plan versions from Adaptive Planning to Workday. This enables you to preview plans in Workday, generate management reporting, and execute budgetary control. This also minimizes the need to manually synchronize data between Adaptive Planning and Workday. You can also create import and export mapping to match values across planning and financial hierarchies.

We recommend that you contact your Customer Success Manager to use this functionality.

See [Concept: Publish Plans from Adaptive Planning](#)

Integration: Design Integrations with PGP Encryption

Release: 2020-09-11

You can now use PGP to decrypt and encrypt files in Custom Cloud Data Source (CCDS) and Custom Cloud Loader scripts. Create a PGP public and private key pair in the Credentials area of the Component Library. Then reference this key pair in your scripts when decrypting or encrypting a file. You must have integration for Adaptive Planning.

See: [Set up PGP Encryption](#)

Integration: Union Tables in Design Integrations

Watch the video: 2m 9s

Release: 2020-09-11

You can now create union tables in Design Integrations to combine the results of any two data source tables into one. Unions help when combining the same type of data from reports in multiple locations. Must have integration for Adaptive Planning.

See: [Set Up a Union Table](#)

Integration: Design Integrations with Secure FTP (SFTP)

Watch the video: 2m 20s

Release: 2020-09-11

You can now access Secure FTP (SFTP) data in Custom Cloud Data Source (CCDS) and Custom Cloud Loader scripts. You must have integration for Adaptive Planning.

See: [Set Up and Configure an SFTP](#)

Integration for Adaptive Planning

Update Only Existing Rows in the Planning Data Loader

Release: 2020-05-14

You can now select an option to update only existing rows when you import to a modeled sheet with the Planning Data Loader. This lets you avoid appending new rows when you import updated rows.

See [Create a Planning Data Loader](#)

Use the eraseData API to Erase Actuals or Plan Data

Release: 2020-09-11

The new eraseData method provides the same capabilities as eraseActuals but also includes the ability to erase Plan data, with additional control over specific account-plan combinations that are targets. Cell notes matching the criteria will also be deleted.

See [eraseData](#)

Use More Options with the exportData API

Release: 2020-09-11

We improved the exportData API to make exporting more efficient and flexible.

- Use markBlanks=true in the exportData API to prevent the output of rows containing only blanks or a combination of blanks and zeroes.
- in API v25 and above, the includeRollups attribute is replaced with includeRollupAccounts and includeRollupLevels for including rollups in your output. You must have an Account or Level filter to use includeRollupAccounts or includeRollupLevels.

See [exportData](#)

Use the Enhanced Planning Data Source

Release: 2020-09-11

We enhanced the Planning Data Source to make it more flexible.

- Import Structure now requires a manual user action, and won't automatically run when you select Import Data.

See [Set Up Adaptive Planning as a Data Source](#)

Support for Sage Intacct Non-Posting Dimensions

Release: 2020-11-13

We added a new option for Sage Intacct data sources that lets you include active non-posting dimensions in your results. This option supports the November 2020 change Sage Intacct made to parent/child logic for Class, Location, and Department dimensions.

See [Steps: Set Up SAGE Intacct Data Sources](#)

Unpivot Workday Multi-instance Objects

Release: 2020-11-13

When you select reports from Workday in the Workday Data Source, you get a new option for multi-instance field behavior. Choose flatten to unpivot the data for consumption by Adaptive Planning. This option closely mimics how Workday export to Microsoft Excel handles multiple multi-instance objects and works best for reports that contain 1 multi-instance object. Ask your implementer to make this option available in your instance.

See [Select Workday Reports in Workday Data Sources for Adaptive Planning](#)

Clear Mappings for Metadata Loaders

Release: 2020-12-10

You can now clear mappings from metadata loaders without deleting and recreating the loader.

See [Create Planning Attribute Loaders](#)

[Create Planning Account Loaders](#)

[Create Planning Dimension Loaders](#)

[Create Planning Level Loaders](#)

Dashboard View Settings

Multi-Select Filters

Release: 2021-01-15

Note: Contact your Named Support Contact to enable this Limited Availability feature. See [Reference: Contact Us](#).

You can now select multiple levels and dimension values with dashboard context filters. Use the Selected tab to view and remove selections. Dimension mapping and sheets on dashboards are not supported.

Encrypt SAML Assertions from Identity Providers

Release: 2020-09-11

To improve the security and privacy of your user information, we now enable you to encrypt the SAML assertion that your identity provider sends to Adaptive Planning by using an official public key certificate. During SAML SSO, Adaptive Planning decrypts the SAML assertion with a private key and validates the signature. After successful validation and authentication, users log in to Adaptive Planning.

See [Configure Your IDP for Encrypted SAML Assertion](#)

Filters and Views for Adaptive Planning Sheets

We make it easier to get to the data you need in your sheets. We add filter options to modeled sheets and we improve your ability to save your view preferences in standard sheets.

Modeled Sheet Filter Options

Release: 2020-09-11

We deliver these new filter display options, making it easier to find specific modeled sheet rows:

- Is Empty. You can't use this for levels and text selectors.
- Is Not Empty. You can't use this for levels and text selectors.
- Uncategorized. You can only use this for custom dimension columns.

See [Suppress Zeros and Blanks on Modeled Sheets](#) and [Change Modeled Sheet View](#).

Filters for Adaptive Planning Reports

Release: 2020-09-11

We deliver filter functionality to make it easier for you to find the data you need in your reports, saving you time and effort. We deliver a new Uncategorized filter as a display option, making it easier to find specific modeled report rows. You can only use the new filter for custom dimension columns.

Process Guide Navigation

Release: 2020-09-11

We make it easier for your users to access their process guides by providing improved navigation on the process overview page.

We deliver a new Go to Process Guide link on the process overview that your users can click to view and complete all assigned tasks, making it easier for them to find their assigned tasks. When a user clicks a specific task assignment on the process overview, Workday directs them to the task in the process guide.

Also, your users can now click the process name in the process guide to easily navigate back to the process overview.

See [Complete Tasks in a Process](#).

Sales Planning: Territory Planning Reference Solution

Release: 2020-09-11

We deliver a new reference solution that supports territory planning and operational flow. The solution includes data models and a set of dashboards, and enables you to:

- Assign teams based on role.
- Change data capture for incremental export.
- Create a change request for an account transfer, and submit it for approval.
- Recommend territory.
- Segment accounts and carve territory.
- Use geo dimensions with data for countries and data for the US down to zip codes.

See [Example: Territory Planning Solution](#)

Modeling: Plan Version Rates for Virtual Versions

You can now configure virtual versions to use the plan rate for the exchange rate version, even when the exchange rate version has actuals overlay. This provides constant currency reporting by removing the variances due to different exchange rates between versions.

Enable Constant Currency Reporting

Release: 2020-11-13

We deliver a new Enable Constant Currency Reporting check box on the virtual version configuration page. This enables the virtual version to use the exchange rate of the plan for periods with actuals overlay.

Retire Report Charts For Adaptive Planning

Release: 2020-9-11

We now retire the charting functionality within Matrix reports since it is no longer needed. We recommend that you use the Dashboards capabilities in the Adaptive Planning product instead.

Note: If you haven't enabled the Dashboards functionality in Adaptive Planning, we recommend that you contact your Customer Success Manager.

Miscellaneous: Small but Noteworthy

Publish Plan

Release: 2020-9-11

- Publish data from linked levels to Workday HCM and Workday Financials.

See [Concept: Publish Plans from Adaptive Planning](#).

OfficeConnect Reports

Release: 2020-9-11

You can now specify a regional gateway when it becomes available to you. This allows you to maintain your data sovereignty requirements.

When authentication options become available in different regions, use the **Regional Settings** option to configure OfficeConnect to use an authentication located in the same region as your company.

See [Set Up OfficeConnect with Regional Settings](#).

Web Reports

Release: 2020-9-11

- The `this.timeper.positionof()` formula now works with the Display As > Custom report element at leaf levels in Matrix reports. Previously when you applied this element to time related functions such as `fiscalmonth(this)`, the result was always a zero (0). Now leaf-level time periods such months resolve correctly. Calculations for rolled up periods such as years still result in a zero with the Display As > Custom element.
- Previously, an error message sometimes incorrectly displayed stating that no accounts matched the given attributes if the following conditions applied to a matrix report:
 - Includes account attributes, version, time, and level
 - Rows with zeros and blanks are suppressed
 - An associated account has no value for a specific intersection

The incorrect error message no longer displays for the above conditions.

- Data now displays correctly for all rows in a matrix report that includes all of the following:
 - Rollup() functions for levels and dimensions
 - More than four tiers of data
 - Rollups suppression
- The Share Reports button and associated permission has now been renamed to Send Notifications for matrix reports.

OfficeConnect and Web Reports

Release: 2020-9-11

The attribute value for a GL account linking to a cube account now calculates correctly when used with multiple levels in the filters for:

- OfficeConnect reports
- Matrix reports in Adaptive Planning

Previously, the account attribute value returned a zero.

Data Import to Locked Levels in Sheets

Release: 2020-9-11

When importing data into any sheet for a specific version, the data import for rows associated with a locked level can fail. Based on their permissions and level access, users can receive an error message for the following Workflow statuses:

- Submitted for Review
- Approved
- Approved and Locked

The import in general succeeds but ignores updating the locked rows. Super users with the *Import To All Locations* permission can continue to import data to all sheets regardless of Workflow status.

See [Steps: Use Workflow](#).

Cube Sheets

Release: 2020-9-11

We corrected evaluator logic used in some cases for calculated cube accounts containing a conditional formula that:

1. References another account within the same cube sheet.
2. Contains formula logic that checks if the account matches account attributes AND level attributes.

In some situations, this logic was evaluating incorrectly to check if the account matches account attributes OR level attributes. Cube accounts like this now correctly evaluate the conditional statement to check if the account matches account attributes AND level attributes to proceed.

Modeled Sheet Timespan Accounts

Release: 2020-11-13

You can now select **Planned by Balance** for cumulative timespan accounts in modeled sheets.

See [Reference: Settings for Custom Accounts](#).

updateDimensions API enhancements

Release: 2020-12-11

New line characters for dimension values in the payload of an `updateDimensions` request get replaced with a blank space character.

We now handle multiple renames of the same entity in the same `updateDimensions` call. This helps resolve an issue when names swap more than once in a remote system between synchronizations into Adaptive Planning.

See [updateDimensions](#).

SAML SSO Tile for Workday Adaptive Planning

Release: 2020-12-11

You can update the tile image you use in your IDP to match our rebranding to Workday Adaptive Planning.

See [Reference: SAML SSO Settings](#).

2020R1 Release Notes

2020R1 Release Notes

Watch: [Recording of the Adaptive Insights 2020R1 release overview and Q&A](#)

Integration

Bulk Update Modeled Sheet Rows

Watch the video: 3m 2s

You now get additional options when you import data to modeled sheets.

Update Rows by Uploading a Spreadsheet

When you import into a modeled sheet you get two options to update existing rows:

- Update existing rows.
- Update existing rows and add new rows.

Indicate the dimension or level your upload should use as the import key, and matching rows throughout the sheet update. When a single row in the import matches multiple rows in the modeled sheet, all matching rows get updated.

For importing modeled sheet data, you may get an error if the sheet has duplicate column names, even if the template does not. To correct, remove duplicate column names from the sheet.

Best Practice: Download your modeled sheet data, then create a version from the sheet version selector or in the Version Admin. Test your update in the new version to verify you get the results you want.

See [Spreadsheet Import](#).

Update Rows Using a Planning Data Loader

When you create a Planning Data Loader, select the modeled sheet to update and indicate the dimension or level column to use as the key for row matching.

See [Create a Planning Data Loader](#).

Update Rows by Making an API Request

Use the `importConfigurableModelData` API to update. Set the level column or dimension column as the import key for rows you want updated. You get two options for how the update works:

- Update: Only matching modeled sheet rows update. Get a warning when matching rows aren't found.
- Update and add new rows: Create new rows when the import key doesn't find matching rows to update.

See [importConfigurableModelData](#).

Export Groups Using APIs

Available in API v23+

Use the new `exportGroups` API to export the user groups in an instance. Both `exportUsers` and `exportLevels` APIs now indicate `groupIds` to show what groups a user or a level belongs to.

See [exportGroups](#) and [exportLevels](#).

Modeling and Access Rules

Protect Modeled Accounts with Access Rules

You can now use access rules to define the modeled accounts your team can view and edit. In the access rule template, choose to list the modeled sheet name, which controls all the accounts on the sheet, or list each account code with the sheet prefix. You can use:

- Initial Balance accounts (example: `Personnel.Payrate`).
- The Timespan account (example: `Personnel.Timespan`).
- Any account in the sheet, including those used as display columns (example: `Personnel.Salary`).

Access rules work throughout your model:

- Sheets
- Reports
- Dashboard charts
- OfficeConnect
- Excel Interface for Planning

See [Concept: Access Rules](#) and [Access Rules and Your Model](#).

Quick View of Cube Account Types

The cube sheet's account list now includes a column with differentiating account types, like standard, metric, assumption, calculated, or linked. The type, *Cube*, is listed for the root account and groups.

See [Cube Sheet Overview](#).

Import and Export Shared Formulas

Watch the video: 2m 56s

Manage shared formula updates faster with the new Export Formulas and Import Formulas buttons.

- Export all the shared formulas for a single account and version.
- Or export all the shared formulas for the entire version in all accounts.
- Use the export to audit and update the formulas. Then import the updates in bulk.
- Export the formulas from one instance or version and import to another.

See [Shared Formulas Overview](#) and [Import and Export Shared Formulas](#).

Eliminations with Minority Interest Trading Partners

Before, elimination rules accounted for the consolidation percent of only one of the trading partners. Unbalanced eliminations due to consolidation percentages calculated remainders in the difference account.

Now, the elimination calculation accounts for the consolidation percent of both trading partners. The elimination uses the smaller consolidation percentage of the the trading partners. For example, if an elimination level owns 75% of Trading Partner A and 100% of Trading Partner B, the percent applied to the elimination entry is 75%. The remaining 25% is left in the intercompany accounts rather than in the difference account.

Process Tracker

Watch the video: 5m 0s

Create Group Tasks

As a process owner, you can create and assign a task to an existing user group. Depending on what condition you set for the group task completion, either any user or all users in the group can complete the task. The process overview provides an overall status of group tasks with a link to details. The process guide lets task assignees track and manage their group task assignments. Group tasks eliminate the need to create multiple tasks that require the same action from individual assignees.

See [Create Processes and Process Tasks](#).

Link Tasks to Dashboards

When creating a process task, as the process owner, you can select a specific perspective or dashboard to link to from a task. Based on access rights, the task assignee can navigate to the linked perspective or dashboard that provides context relevant to the process and task. Assignees don't need to search through all dashboards they can access to arrive at a specific dashboard.

See [Create Processes and Process Tasks](#).

Collapsible Task List

Intended Release: General Availability March 6, 2020.

You can now expand or collapse the task list in your process guide to increase or decrease your workspace.

See [Complete Tasks in a Process](#).

Reporting and Analysis

Dashboards

Watch the videos: 6m 36s

Interactive Dashboards	Sheets are now available on dashboards. Collaborate, enter data, add text, and view charts without leaving your dashboard. Use sheets on dashboards to simplify your planning experience and create rapid what-if analysis scenarios. See Add Sheets on Dashboards. • Save changes to instantly update dependent charts and sheets without having to navigate out of your dashboard. • Create multiple sheets with different display configurations based on the same underlying sheet.
Dashboards as a Landing Page	As an administrator or a user, you can now select a specific perspective or a dashboard as a landing page when you select Dashboards for the Home page option. Administrators can set this for a user in the Edit User page. Users can set this in their profile page. Based on their access, users can then view either the Dashboards overview or a specific perspective or a dashboard as their home page. See Change Your Profile, Home Page, and Email Groups.
Geo Map	Visualize data on a map with circles with the new geo map. The geo map shows data based on the geography region's latitude and longitude. • Compare and contrast values across different regions with circle size, color scale, or both. • Navigate the geography hierarchy down to the zip code level. See Create Geo Maps.
Share Dashboards with User Groups	Share dashboards with many users at once. You can now share perspectives with user groups. See Share Perspectives.

Web Reporting

Suppress Columns with Zeros or Blanks	For matrix reports, a new data visibility option is now available in the report properties. Select Suppress columns if all zeros or blanks to hide columns from your report that either have all zeros as values or are all blanks. This capability is not selected by default.
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	See Change Element and Report Properties.
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OfficeConnect

Dynamically Update Rows and Columns	Watch the video: 6m 37s Create and apply element groups to your report rows and columns. An element group includes all immediate children or selected siblings of a parent. For example, the Operating Expenses group includes all children expenses of this parent account. Whenever you add, remove, or reorder the children in a group, update the group to update the report with these changes. See Create and Manage Element Groups.
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Sales Planning

Derive Dimension Values on Modeled Sheets

Important: Contact your Customer Success Manager to get started.

Watch the video: 5m 49s

Derived dimension values let you dynamically group data based on user-defined multi-dimensional lookup rules. Derived dimension values can help simplify your planning process by allowing you to:

- Plan at a high-level with aggregate data.
- Make adjustments at the individual item level.

For example, you can perform dynamic customer segmentation based on the customer demographic attributes geo location, industry, and company size during territory planning. Create a derived dimension to have values on modeled sheets to be automatically populated based on user-defined dimension value mapping rules. Use the new dimension mapping dashboard table to view, update, delete, and create new dimension value mapping rules.

See [Steps: Set Up Derived Dimensions](#).

Enhanced Experience with Sheets

Watch the video: 4m 5s

Visual and usability enhancements for standalone sheets and sheets on dashboards.

Sheets on dashboards

- You can select custom dimensions in the perspective to filter modeled sheets.
- Cube sheets now display dimension pickers. Maximize cube sheets to edit dimension pickers.
- The search field now remains expanded to indicate applied filters.
- Modeled sheet Display Options is now highlighted when a filter is applied.
- You can now add rows on cube sheets.
- Formula assistant is now available only in expanded mode.

See [Add Sheets on Dashboards](#).

Geo Map Sample Data

Start creating geo maps with sample datasets that includes latitude and longitude coordinate data.

See [Import Custom Property Values to Dimension Values](#).

User Experience

More Improvements in Sheets

Dialog Boxes with Clear Prompts and Labels	Clarified labels and prompts in the Breakback Method, Copy Forward and Delete Splits dialog boxes: Apply Breakback Method Distribute the rollup value 555 to contributing cells ☒ Proportionally ☐ Proportionally using prior year's values ☐ Evenly ☐ Weighted 4-4-5 ☐ Weighted 5-4-4 ☐ Weighted 4-5-4 ☐ Choose an assumption Assumption 1 Copy Forward VALUE 8000 COPY THROUGH End COPY OPTIONS No Change Enter Value ☐ Stop at zero
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See: [Copy Forward and Downward](#).

Workday Brand Alignment

It's a subtle change that aligns Adaptive Planning more closely to the Workday brand. You'll notice a different shade of blue throughout your instancein the toolbars, buttons, and links.

Knowledge Center Search Filters

The icon carousel in the search results got replaced with a side panel.

Filter Results	
Location	
Classification	
Include attachments	

Searching in [All results](#)
About 636 results

[Accounts](#)
<https://knowledge.adaptiveplanning.>
Product documentation for man

[Accounts](#)
<https://knowledge.adaptiveplanning.>

Workday Using Adaptive Planning

Important: You must work with a Workday-certified implementer. If you don't have access with an implementer, contact your Customer Success Manager to engage professional services.

Some links in this article go to the Workday Community. If you don't have a Community account, [request one](#).

Watch the videos: 16m 22s

Synchronize User Accounts

You can now access Adaptive Planning from Workday using the same user account for more unified security. Adaptive Planning user accounts synchronize with user accounts in Workday. Adaptive Planning administrators can then assign users the appropriate role and level permissions in Adaptive Planning.

- If your organization has multi-instances of Adaptive Planning, you can now access them from Workday. See [Access Multi-Instances from Workday](#).
- You can now easily manage and switch between multiple Workday tenant connections for OfficeConnect and Excel Interface for Planning. See [Set up OfficeConnect and Excel Interface for Planning with Workday Credentials](#).

Access OfficeConnect and Excel Interface for Planning from Workday

Watch the video: 4m 44s

If your instance is set up with Workday and your user accounts are centrally managed from Workday, your IT admin can set up your OfficeConnect users to log in with their Workday credentials. Once setup, any users with OfficeConnect or Excel Interface for Planning can log in using their Workday credentials.

See [Set Up OfficeConnect for Workday SSO](#).

See [Sync Users with Adaptive Insights](#)

Publish Headcount Plans

You can now publish plan versions from Adaptive Planning to Workday. This enables you to preview plans in Workday, generate management reporting, and support downstream actions, such as position creation, streamlining your plan to execute process. This also helps minimize the need to manually synchronize data between Workday and Adaptive Planning.

To set up, you'll need to define a user group and give the group the Publish access type. Members of this group will get an additional main navigation link for Publish Plan. This link will let you:

- See a detailed history of what published
- Review publication status
- Publish plans
- Take action on messages

See [Concept: Publish Plans from Adaptive Planning](#).

Important: To publish plans, the Workday credential for your Workday data source must use JWT Bearer for Client Grant Type. See [Switch to JWT Client Grant Type in Adaptive Planning](#).

Adaptive Planning Notifications in Workday

You can now access your Adaptive Insights alerts directly in Workday, providing a central location for all notifications. You can also access direct links in these notifications that gets viewers directly to the appropriate location in Adaptive Planning where applicable. This makes it faster and easier for you to find the items that you need to take action on.

These Adaptive Planning alerts are available as Workday notifications:

- Processes
- Workflow
- Reports
- Dashboards
- Integration

Use Adaptive Planning APIs with Workday Credentials

Workday-synchronized users can access the Adaptive Planning public APIs with their Workday credentials. An administrator in Workday first configures the Adaptive Insights API task and API timeout for the users who need to run the APIs. Requests for Adaptive Planning APIs from Workday-synchronized users replace the username and password in the `credentials` element with a `ticket` that functions as an access token.

See [Making Adaptive Insights API Requests with Workday Credentials](#).

Multi-Instance Support for Workday

If your organization uses multi-instances, you can now access multiple Adaptive Planning instances from Workday.

Set Up OfficeConnect and Excel Interface for Planning with Multiple Tenant Associations in Workday

When configuring OfficeConnect and Excel Interface for Planning for Workday login, you can now save multiple Workday tenant associations using user-friendly names. Users with multiple tenants in Workday can connect to multiple instances in Adaptive Planning. For example, a production Adaptive Planning instance connected to a production Workday tenant and a sandbox Adaptive Planning instance connected to a sandbox Workday tenant. When OfficeConnect and Excel Interface for Planning users log in using their Workday credentials, they can switch between the instances using the Switch Tenant option on the Workday Log In window. Previously, users had to manually overwrite the login settings to switch between tenants.

Where's the Docs?

Workday related documentation from the Integration area of the Adaptive Planning knowledge center moved into the Workday community. Make sure you update any browser bookmarks that link to the moved content.

Was in Knowledge Center	Now in Workday Admin Guide
Set Up aWorkday Data Source	Steps: Set Up Workday Data Sources for Adaptive Planning Steps: Create Workday Credentials in Adaptive Planning Select Workday Reports in Workday Data Sources for Adaptive Planning
Set Up aWorkday External System for Drillback and Publishing Plans	Set Up Workday External Systems for Adaptive Planning

Workforce Planning with Workday HCM

Workforce planning is an Adaptive Planning instance that uses your Workday HCM data. The model foundation includes dimension and data loaders, top-down and bottom-up modeled sheets, dimensions, and formulas.

Workforce Planning Benefits

- Get an accurate picture of your workforce and adapt to changing requirements.
- Drive what-if scenarios.
- Create effective hiring plans, identify gaps, and align with business goals.

What Workforce Planning Does

- Stream Workday data to Adaptive Planning sheets.
- Enter and edit data in Adaptive Planning sheets to model your plans.
- Model headcount, skills, transfers, planned hires, and attrition.
- Share plans with your people managers.
- Get their feedback and buy-in early and often.
- Check actuals to plan and take corrective actions when needed.

Set Up Workforce Planning

The workforce planning instance is a separate instance from your Adaptive Planning financial planning instance. To get started:

- You must contact your Customer Success Manager.
- You don't need an existing financial planning model.
- You do need Workday HCM. If you don't use Workday HCM, use the personnel planning sheet that comes with your financial planning model to manage your workforce. Or, contact us to discuss other options.

Workforce Planning Foundation Model

Workday - Adaptive Planning Integrations	Adaptive Planning Model Structure
• Workday custom reports • Workday credential • Adaptive Planning data sources • Adaptive Planning data loaders	• Structured with assumptions, drivers, and formulas • Preset modeled and cube sheets • Levels • Custom dimensions • Custom dimension attributes

See [Reference: Workforce Foundational Model](#).

Small but Noteworthy

Set Visual Preferences for Sheets

Administrators can use the new display setting to increase the contrast of all sheets for the entire instance. Grid lines and colors appear darker, so it's easier to view sheets on projectors. Go to Administration > Visual Preferences and select the Enhance the visual contrast in sheets checkbox.

See [Reference: Visual Preferences](#).

ACCOUNTS	DEC-2011	Q4-FY11	FY2011	JAN-2012	FEB-2012	MAR-2012
▼ Operational Expenses						
▶ CTestDebit						
▼ Payroll						
Salary	79,205	237,615	932,859	79,205	79,205	79,205
Benefits	10,668	32,003	125,642	10,668	10,668	10,668
Total	89,873	269,618	1,058,501	89,873	89,873	89,873
▼ Utilities						
Telephone						
Internet						
Other Utils						

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Telephone						
Internet						
Other Utils						

Modeled Sheet Enhancements

- Clearing data in a modeled sheet cells now results in blanks instead of zeros for number type columns. This improves calculations and reporting data. Right-click a cell and select Clear. See [Reference: Clearing Data in Cells](#).
- Downloading is only available for 1.5 million cells or less. If the download button is inactive, use filters to reduce the sheet size.

Note: The current download max for cells in modeled sheets is 5 million cells.

Additional Memory Limit for Reports

For web reports, there is now an additional memory limit and users get an error message if a report exceeds this limit. Report runners can modify a report to reduce the number of elements and rerun it.

Previously, when creating reports, the existing limits did not consider certain conditions. This led to a report becoming unresponsive if it crossed the allocated memory.

Retired Functionality

2020R2 Retired Functionality

Provides information about retired functionality announced in this release.

Sales Planning

Features	Object Modeling
Replacement	The introduction of derived dimension values replaces the old object modeling experience for territory planning.
Why?	The introduction of derived dimension values simplifies the territory planning process.
Effective Date	As of 2020R2 general availability.
Notification Date	N/A
Action Required Details	N/A
Workgroup?	None
Workgroup Information	N/A
Notes	

Features	Transaction Tables
Replacement	Use a modeled sheet instead for territory planning.
Why?	The introduction of derived dimension values simplifies the territory planning process making use of your data on modeled sheets.
Effective Date	As of 2020R2 general availability.
Notification Date	N/A
Action Required Details	N/A
Workgroup?	None
Workgroup Information	N/A
Notes	

Web Reports

Features	Matrix report charts
Replacement	Use the Dashboards capabilities within Planning
Why?	We now retire the charting functionality within Matrix reports since it is no longer needed. We recommend that you use the Dashboards capabilities in the Adaptive Planning product instead.
	Report charts rely on outdated flash technology which is becoming obsolete for support on all browser platforms at the end of 2020. Use Dashboards for your current visualization needs.
Effective Date	As of 2020R2 general availability.
Notification Date	NA
Action Required Details	If you haven't enabled the Dashboards functionality in Adaptive Planning, we recommend that you contact your Customer Success Manager.
Workgroup?	None
Workgroup Information	NA

Notes

Integration

Features	Custom Scripts - Pervasive Connector
Replacement	Use other components of the Integration Framework.
Why?	Effective January 1, 2020, we no longer received software updates, fixes, and other forms of support from (Actian, formerly known as Pervasive) the third-party vendor. The code supporting the Pervasive Connector will be removed in the next release and the hosted connectors will no longer function.
Effective Date	As of 2021R1.
Notification Date	August 8, 2020
Action Required Details	NA
Workgroup?	None
Workgroup Information	NA
Notes	Adaptive Planning recommends these legacy connectors be transitioned over to the Adaptive Planning Integration Framework. All customers were contacted to migrate away from the Pervasive Connector by January 1, 2020.

2020R1 Retired Functionality

Provides information about retired functionality announced in this release.

Sales Planning

Features	Territory Maps
Replacement	Use the new geo map for territory planning.
Why?	The flexible new geo map replaces the need for the old territory map.
Effective Date	As of 2020R1 general availability.
Notification Date	N/A
Action Required Details	N/A
Workgroup?	None
Workgroup Information	N/A
Notes	

Features	Object Modeling
Replacement	The introduction of derived dimension values replaces the old object modeling experience for territory planning.
Why?	The introduction of derived dimension values simplifies the territory planning process.
Effective Date	As of 2020R2 general availability.
Notification Date	N/A
Action Required Details	N/A
Workgroup?	None
Workgroup Information	N/A
Notes	

Features	Transaction Tables
Replacement	Use a modeled sheet instead for territory planning.
Why?	The introduction of derived dimension values simplifies the territory planning process making use of your data on modeled sheets.
Effective Date	As of 2020R2 general availability.
Notification Date	N/A
Action Required Details	N/A
Workgroup?	None
Workgroup Information	N/A
Notes	

2019.3 Retired Functionality

Find information about retired functionality from Adaptive Planning starting with Release 2019.3.

OfficeConnect

Features	OfficeConnect file extension .xlsxai is no longer supported
Replacement	You can now save the OfficeConnect reporting workbooks as Microsoft Excel workbooks using the standard .xlsx file extension.
Why?	OfficeConnect now provides an enhanced experience in Microsoft Excel and supports many of the standard Excel capabilities. The application no longer launches as a separate Excel process. You can just start Excel and log in to OfficeConnect in the same Excel process. OfficeConnect now persists with other Excel add-ins.
Effective Date	As of 2019.3 general availability, we will support upgrading the .xlsxai files for up to 12 months.
Notification Date	N/A
Action Required Details	Upgrade your existing OfficeConnect files to Microsoft Excel files within the 12-month grace period.
Workgroup?	None
Workgroup Information	N/A
Notes	

API

Features	rootActuals is no longer supported in the exportVersions API method across all API versions. rootActuals indicated whether the root actuals version should be included when actuals are hidden from the version selector.
Replacement	Grant the user permissions to view the Actuals versions instead of hiding them.
Why?	With the introduction of access rules, we updated the API to reflect the new functionality.
Effective Date	As of 2019.3
Notification Date	N/A

Action Required Details	Remove rootActuals from exportVersions requests and not include it in API scripts in the future. Existing exportVersions API with this setting will return a specific error to help with troubleshooting.
Workgroup?	None
Workgroup Information	N/A
Notes	