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# Let's Talk: Workday 2025 Release 2 Optional Features

## QUICK TIPS

# Zoom Webinars

### Ask Questions in Q&A Box

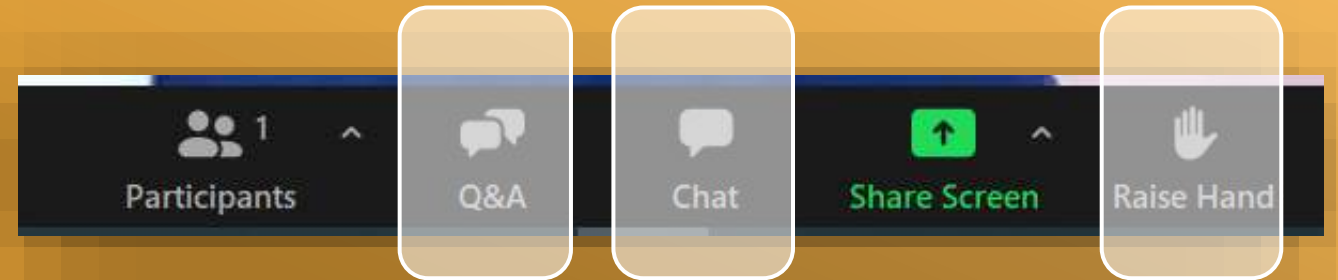
- Click the Q&A button to open the window
- Type your response in the text field
- Click Send

### Chat

- Click the Chat button to open the chat panel
- Type your message in the Text box at the bottom of the panel
- Press Enter to send your message

### Raise Your Hand

- Click the Raise Hand button at any time to indicate to the host know that you have a question or need assistance
- To lower your hand, click the Lower Hand button



WELCOME

# Today's Presenters



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Solution Architect, Armanino



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LET'S TALK WORKDAY

# Today's Agenda

- Overview
- 2025R2 Optional Features

# 2025R2 Optional Features

# Optional Feature Review Overview

- We're so glad you're here to learn about the features in Workday's bi-annual release!
- This presentation will focus on the features that are going to be 'Setup Required' ie 'Optional' for your teams to adopt in your Workday tenant on September 20, 2025.



**Automatically Available = Mandatory Features:** features that will be in your tenant on Sept 20 whether you like it or not!



**Setup Required = Optional Features:** features that require configuration to enable but are available for your team to uptake!

- The Optional features that will be reviewed today are the most anticipated features that could have the most business benefit!

# HCM



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## HCM

# Job Architecture Hub

### **Description**

- New Job Architecture Hub gives a centralized location for managing job architecture data. Filters in the hub include Job Profile, Job Family, Job Family group, Skill, Management Level, Job Level, Job Classification, Supervisory Organization, Include Subordinate Organization, Cost Center

### **How this impacts you**

- New Job Architecture Hub now available

### **Impact to user groups**

- HR Admins

### **Regression Testing Recommended?**

- No

## HCM

# Manager Insight Hub – Contingent Worker Team

### **Description**

- Manager Insight Hub has been enhanced allowing you to manage contingent workers and can connect to the Workday VNDLY platform.

### **How this impacts you**

- New Contingent Worker Section in the Manager Insight Hub

### **Impact to user groups**

- Managers

### **Regression Testing Recommended?**

- No

## HCM

# Manager Insights Hub – Hire Employee Buttons and View My Team in Mobile

### **Description**

- A Hire Button has been added to the Manager Insight Hub along with a View My Team page on the mobile app.

### **How this impacts you**

- View My Team page now available on mobile
- 4 new hire buttons have been added to the Hiring and Staffing Overview page on the manager insight hub. The buttons display based on the initiating actions the users have access to on the Hire business process

### **Impact to user groups**

- Managers

### **Regression Testing Recommended?**

- No

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**HCM**

# Multiple Jobs for Contingent Workers

## **Description**

- Contingent Workers are now able to hold multiple jobs at a time.

## **How this impacts you**

- New Add Job for Contingent Worker initiating action. Contract details can be entered in the Add Job for Contingent Worker task

## **Impact to user groups**

- Contingent Workers

## **Regression Testing Recommended?**

- Yes

## HCM

# E-Verify Employer Agent

### **Description**

- E-Verify employer agents can now submit employment eligibility verification on behalf of other employers. Note: this only applies to companies that have opted to participate in the E-Verify Employer Agent web services program.

### **How this impacts you**

- New attribute added to E-Verify – Employment integration system

### **Impact to user groups**

- Integration Team

### **Regression Testing Recommended?**

- No

**HCM**

# Correct Actions for Edit Govt ID, Legal Name Change, PI Change BPs

**Description**

- Can now correct Personal Action Request (PAR) business processes

**How this impacts you**

- Correct field is now available in business process security for the follow Business Processes:  
Edit Government ID, Legal Name Change, Personal Information Change

**Impact to user groups**

- HR Admins

**Regression Testing Recommended?**

- No

# Core Compensation

## Core Compensation

# Templates for Request Compensation Change

### Description

- Workday enables you to configure compensation change templates for the compensation process within Request Compensation Change

### How this impacts you

- Templates now available for Request Compensation, which will change user interface similar to Change Job Templates

### Impact to user groups

- Compensation Partners

### Regression Testing Recommended?

- No

The screenshot displays the 'Maintain Compensation Change Templates' interface. On the left, a sidebar lists template types: 'One Time Payment' and 'Merit Increase', with 'Merit Increase' selected. The main area is titled 'Edit Template' and contains two sections: 'Basic Details' and 'Template Content'. The 'Basic Details' section includes fields for 'Template Name' (set to 'Merit Increase'), a checkbox for 'Make this Template Inactive', a 'Select Security Group' dropdown, a 'Enable for Business Process Type' dropdown (set to 'Request Compensation Change'), and a 'Reasons for Request Compensation Change' dropdown (set to 'Time in Step'). The 'Template Content' section includes a 'Select Sections for Template' dropdown, a 'Salary Fields to Display' dropdown (set to 'Salary - Amount Change'), and an 'Allowance Fields to Display' dropdown (set to 'Allowance - Fixed to Manager by Basic Rate'). At the bottom, there are 'OK' and 'Cancel' buttons.



## Core Compensation

# Remove Prior Compensation for Rehires

### **Description**

- Terminated workers can now be rehired without reassigning or displaying compensation from their previous employment within the Propose Compensation Hire business process

### **How this impacts you**

- New field available to toggle on or off in the Edit Tenant Setup – HCM task

### **Impact to user groups**

- System Admins, Recruiters, Compensation Partners

### **Regression Testing Recommended?**

- No

# Benefits

## Benefits

# Generate Help Articles for Healthcare Plans with AI

## Description

- Workday can now draft Help articles for healthcare plans using AI.
  - Drafts are created in the Help Workspace, where administrators can review, edit, and publish.
- Articles can also be linked to the healthcare plan's Related Articles field.

*\*\*Note: The Workday Help Module is required for this feature\*\**

## How this impacts you

- Employees gain easier access to plan details in one search, while administrators save time creating articles and can focus on review and approval.

## Impact to user groups

- Benefits Administrators
- HR/Benefits Partners
- Employees accessing healthcare plans

## Regression Testing Recommended?

- No

# Absence

## Absence

# Custom Additional Fields for Leave Types

### Description

- Workday delivers a new framework for creating and maintaining custom additional fields in Absence, enabling you to support global leave of absence use cases by adding custom additional fields with label overrides to leave types. This enables you to meet your downstream payroll processing and regulatory reporting requirements by tracking data within Workday and reducing manual effort.

### Examples of how to use:

# of days lost due to leave requests  
Dates of follow-up appointments  
Dates paperwork provided  
Certification of requests for FMLA or parental leave

### Impact to user groups

- Leave of absence admins

### How this impacts you

- Provides the ability to track and report off of custom fields.

## Absence

# Payout of Expiring Accruals

## Description

- Workday extends its Accrual Expiration functionality, enabling you to configure time off plans to automatically pay out unused, expiring accruals using the new **Time Off forfeiture Adjustment Process**. This update enables you to manage the payout of expiring accruals more efficiently.

## How this impacts you

- Visual Change, process change, potential impact to training materials etc.

## Impact to user groups

- Employee as Self or Payroll Admins etc.

The screenshot displays the 'Time Off Plan' configuration page in Workday. The 'Details' tab is active, showing fields for Name, Code, Require Position on Time Off Request, Category, Time Off Type, Allow to Sell Time Off, and Comments. The 'Enable for Forfeiture Adjustment' checkbox is checked. The 'Forfeiture Type' dropdown is set to 'Expiring Accruals'. The 'Forfeiture Options' tab is highlighted at the bottom.

Name	USA Vacation Time Off (Salaried)
Code	VAC_TO_GMS
Require Position on Time Off Request	<input type="checkbox"/>
Category	Absence Payroll
Time Off Type	Vacation (Hours)
Allow to Sell Time Off	<input type="checkbox"/>
Enable for Forfeiture Adjustment	<input checked="" type="checkbox"/>
Picked up by Payroll Interface one Period in Arrears	<input type="checkbox"/>
Visible for Team Absence	<input checked="" type="checkbox"/>
Comments	USA Vacation Time Off is for salaried employees in the United States. Validations include:

Details | Validations | Time Off Plan Overrides | Reasons | Worktags | Sell Options | **Forfeiture Options**

Forfeiture Type \* Expiring Accruals

## Absence

# Document Generation Support for Absence Business Processes

### Description

- Generate document is now available as an action step on Absence business processes. Workday can now generate dynamic editable documents as part of the bps: Absence Case Event, Buy Time Off, Correct Time Off, Request Leave of Absence, Request Time Off, Return Leave of Absence and Sell Time Off.

### How this impacts you

- Could support your teams in document and information collection in your time off plans and leaves.

### Impact to user groups

- Employee as Self or Leave Admins etc.

## Absence

# Default Start and End time from Work Schedule

## Description

- Workday enables you to configure time offs and absence tables to automatically populate the start and end times on time off requests from a worker's work schedule. This saves time and reduces entry errors.

## How this impacts you

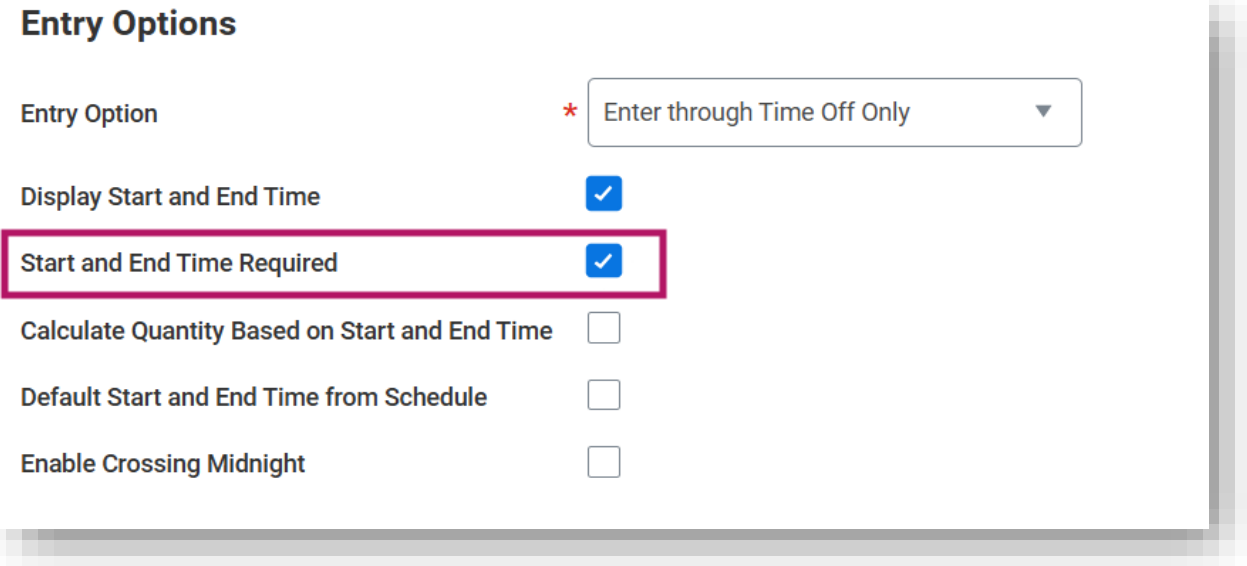
- Increases efficiency and data accuracy when workers request time off.

## Impact to user groups

- Employee as Self or Absence Admins etc.

## Testing Recommended?

- Yes, if you decide to uptake



**Entry Options**

Entry Option \* Enter through Time Off Only ▼

Display Start and End Time ☒

Start and End Time Required ☒

Calculate Quantity Based on Start and End Time ☐

Default Start and End Time from Schedule ☐

Enable Crossing Midnight ☐



## Absence

# Position Based Time Off Plans and Leave Types for Contingent Workers with Multiple Jobs

### Description

- Workday enables you to configure position based time off plans and leave types when you have enabled multiple jobs for contingent workers.

### How this impacts you

- Allows you to define plans that are not just for worker's primary positions.

### Impact to user groups

- Employee as Self or Payroll Admins etc.

### Regression Testing Recommended?

- yes or no

# Time Tracking

## Time Tracking

# Hide All Current Time During Time Approval

### Description

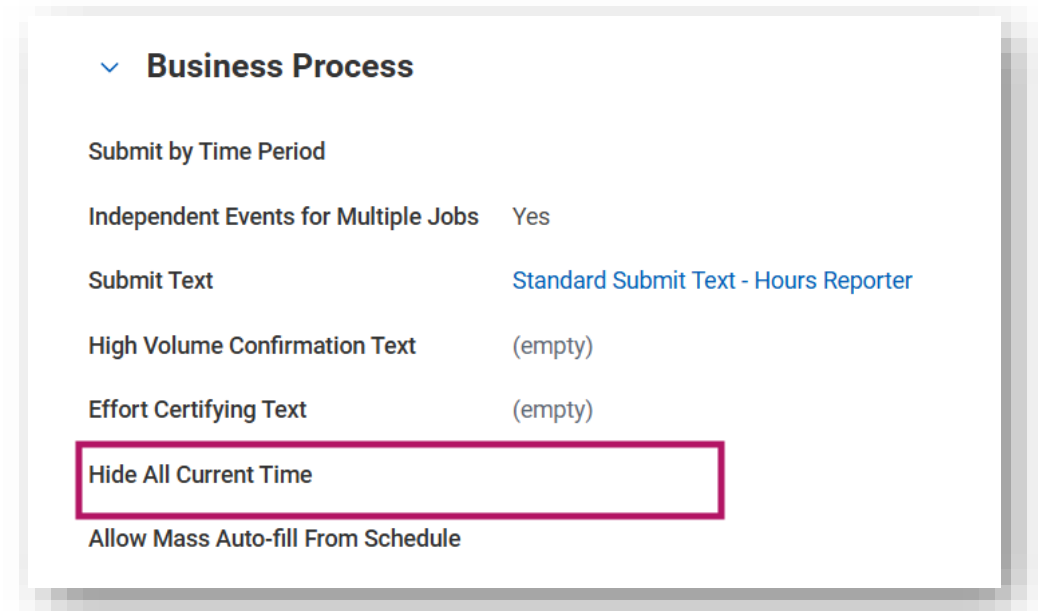
- Ability to hide the **All Current Time** section in the **Time Entry Approval** in My Tasks. When selected, we no longer display the all Current Time section during the approval of a worker's time in My Tasks. Instead, only time blocks or time off entries included on the vent are visible to the approver.

### How this impacts you

- You can now protect worker privacy and ensure time approvers only see the information relevant to their specific approval tasks.

### Impact to user groups

- Employee as Self or Payroll Admins etc.



Business Process

Submit by Time Period

Independent Events for Multiple Jobs Yes

Submit Text [Standard Submit Text - Hours Reporter](#)

High Volume Confirmation Text (empty)

Effort Certifying Text (empty)

**Hide All Current Time**

Allow Mass Auto-fill From Schedule

## Time Tracking

# Enter Time by Type (New!)

### Description

- A configurable project time entry task that simplifies and streamlines time entry for project workers. Enables project workers to quickly and efficiently enter their time in an easy to use grid that you can organize by time types.

### How this impacts you

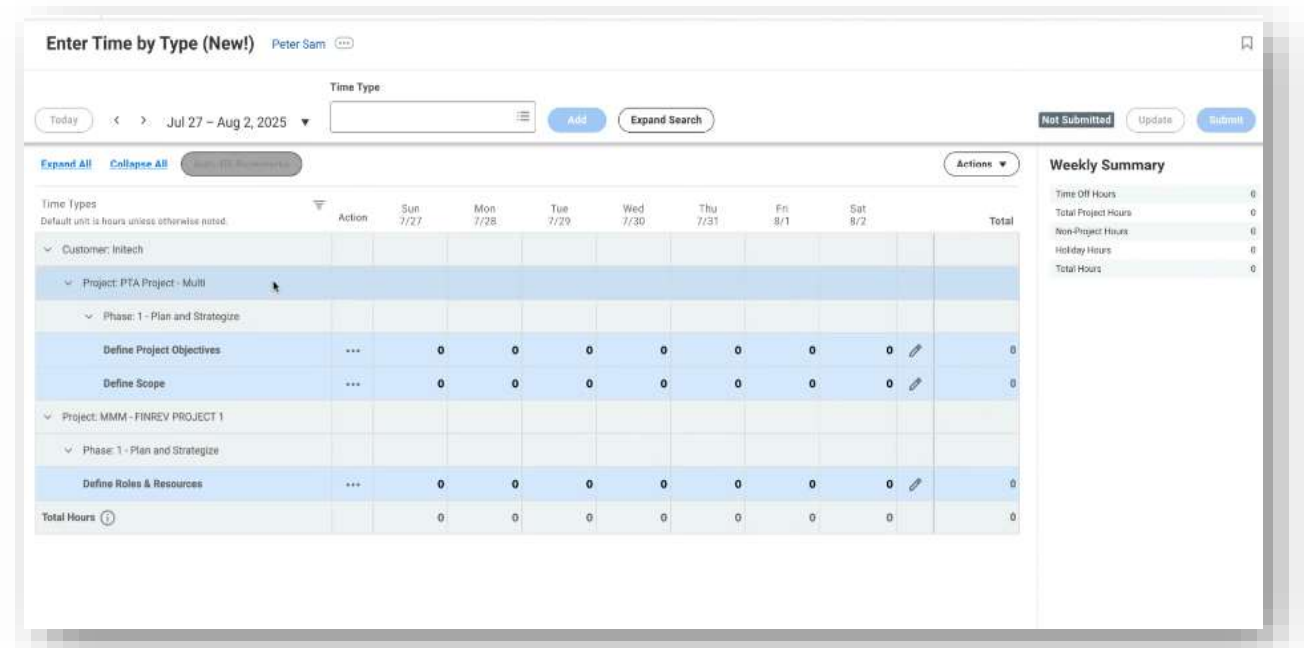
- Visual Change and process change for employees if you uptake!

### Impact to user groups

- Clients using Projects in Workday

### Regression Testing Recommended?

- Yes, if you uptake



The screenshot displays the 'Enter Time by Type (New!)' interface. At the top, there's a header with the title 'Enter Time by Type (New!)' and a user profile 'Peter Sam'. Below the header, there's a 'Time Type' dropdown menu and a date range selector set to 'Jul 27 - Aug 2, 2025'. There are buttons for 'Add', 'Expand Search', 'Not Submitted', 'Update', and 'Submit'. The main area is a grid with columns for days of the week (Sun 7/27, Mon 7/28, Tue 7/29, Wed 7/30, Thu 7/31, Fri 8/1, Sat 8/2) and a 'Total' column. The grid is organized by 'Time Types' (Customer, Project, Phase, Task). The 'Customer' section shows 'Intech'. The 'Project' section shows 'PTA Project - Multi'. The 'Phase' section shows 'Phase: 1 - Plan and Strategize'. The 'Task' section shows 'Define Project Objectives' and 'Define Scope'. The 'Total Hours' row at the bottom shows a total of 0 hours for each day and a total of 0 hours overall. On the right side, there's a 'Weekly Summary' section with a table showing 'Time Off Hours', 'Total Project Hours', 'Non-Project Hours', 'Holiday Hours', and 'Total Hours', all with values of 0.

Time Types	Action	Sun 7/27	Mon 7/28	Tue 7/29	Wed 7/30	Thu 7/31	Fri 8/1	Sat 8/2	Total
Customer: Intech									
Project: PTA Project - Multi									
Phase: 1 - Plan and Strategize									
Define Project Objectives	...	0	0	0	0	0	0	0	0
Define Scope	...	0	0	0	0	0	0	0	0
Project: MMM - FINREV PROJECT 1									
Phase: 1 - Plan and Strategize									
Define Roles & Resources	...	0	0	0	0	0	0	0	0
Total Hours		0	0	0	0	0	0	0	0

Weekly Summary	
Time Off Hours	0
Total Project Hours	0
Non-Project Hours	0
Holiday Hours	0
Total Hours	0

## Time Tracking

# Configuration Options for Edit and Approve Time

### Description

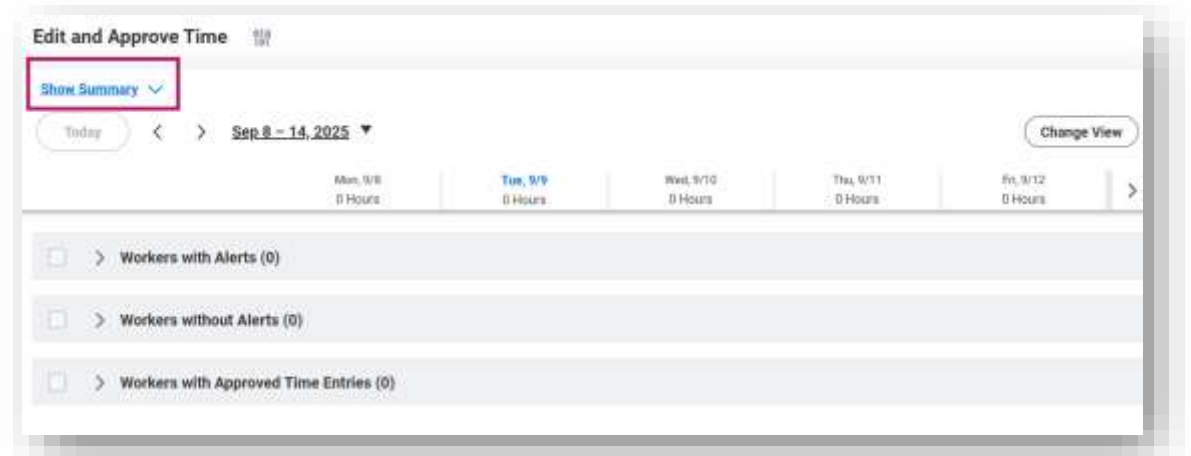
- We update the Edit and Approve Time report to provide administrators with greater control over the user interface. You can now configure the autofill entry method and the default display state of the top summary cards.
- **Collapse Top Summary Cards** - select to collapse the top summary cards by default when running the report, navigating across weeks, and refreshing the page.
- **Disable Autofill** – select to display the time block for manual editing of unmatched time clock events or incomplete time blocks.

### How this impacts you

- This will make your visual experience more efficient.

### Impact to user groups

- Managers



## Time Tracking

# Enter Time by Period

### Description

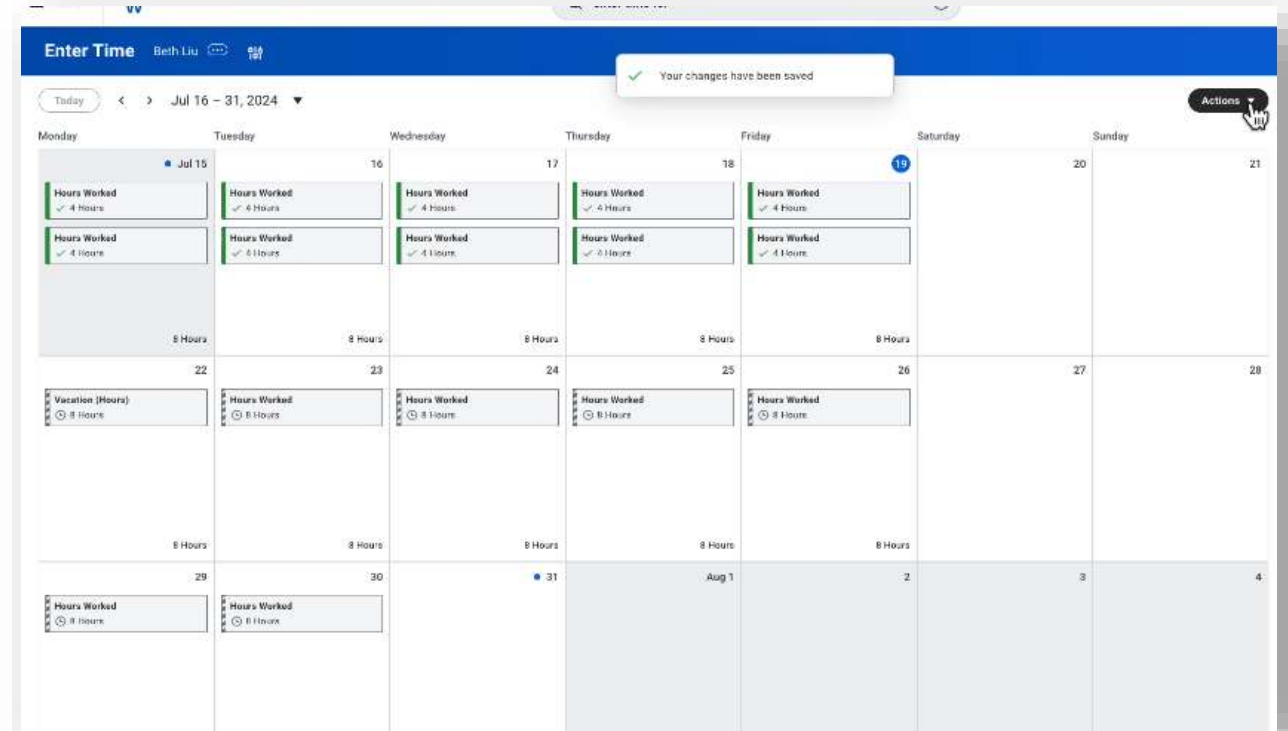
- Enable workers and managers to use only the period calendar for time entry, and we enhance the user experience with integrated help text and print functionalities.

### How this impacts you

- This will simplify the time entry experience for workers and managers with a more intuitive interface.

### Impact to user groups

- Employee as Self and Managers



# Payroll

## Payroll

# Assign Costing Allocation Questionnaire

### Description

- We enable you to add a questionnaire to the Assign Costing Allocation business process. This will enable you to require detailed explanations for costing allocations that occur outside an approved date range.

### How this impacts you

- Potential process change

### Impact to user groups

- Employee as Self or Payroll Admins etc.

### Regression Testing Recommended?

- Yes, if you decide to implement



## Payroll

# Bank Account Verification for Payment Elections

### Description

- New verification screens when users enable the Bank Account Verification for Payment Elections configuration on these tasks: Change Account Information, Edit Payment Election

### How this impacts you

- This feature will strengthen payroll security by blocking unauthorized bank account changes and reducing fraud risk from phishing attacks.

### Impact to user groups

- Employee as Self

### Regression Testing Recommended?

- Yes, if you decide to implement

## Payroll

# Pay Accounting Reallocation

### **Description**

- Workday introduces pay accounting reallocation, which enables you to process accounting for a prior payroll period based on retroactive costing allocations that could cause updates to accounting when re-processed.

### **How this impacts you**

- This will make it easier to process multiple payroll accounting adjustments in order to correct accounting on completed payroll results.

### **Impact to user groups**

- Payroll Admin, Accountants

### **Regression Testing Recommended?**

- yes if you implement

## Payroll

# External Payroll Inputs Enhancements

### Description

- Workday improves external payroll input capabilities by adding payroll input reasons as an option, enhanced traceability and integration. Workday delivers the new Maintain External Payroll Inputs Reasons task to create, rename, and manage external payroll input reason.

### How this impacts you

- Improves payroll operations accuracy and efficiency.

### Impact to user groups

- Payroll Admins

### Regression Testing Recommended?

- no

## Payroll

# Payslips for Payroll for the U.S.

### **Description**

- Workday updates electronic payslips accessed through Workday desktop to include worker address.

### **How this impacts you**

- This supports compliance with the Ohio Pay Stub Protection Act, effective April 9, 2025, which requires employers to provide workers with printed or electronic statements of their earnings and deductions.

### **Impact to user groups**

- Employee as Self

### **Regression Testing Recommended?**

- yes if implementing

# Recruiting

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## HCM

# Constrained Prospect Security by Country

### Description

- Enhanced prospect security that allows you to constrain security access based on the prospect's country.  
Create regions for recruiting for 1 or more countries, and assign roles needed for your organization.

### How this impacts you

- Enables constrained security groups on the Prospects domain and additional/related domains, allowing you to control precisely who sees what based on location
- Ensures your organization stays compliant with the GDPR requirements by restricting recruiter access by countries
- Allows recruiters to only see prospect data relevant to their assigned regions, leading to more efficient workflows and less clutter
- Introduces flexibility by allowing you to customize regions that align with your organization's structure.

### Impact to user groups

- Security Administrators, Recruiters, Prospects

### Regression Testing Recommended?

- Yes, if uptaking the feature

## HCM

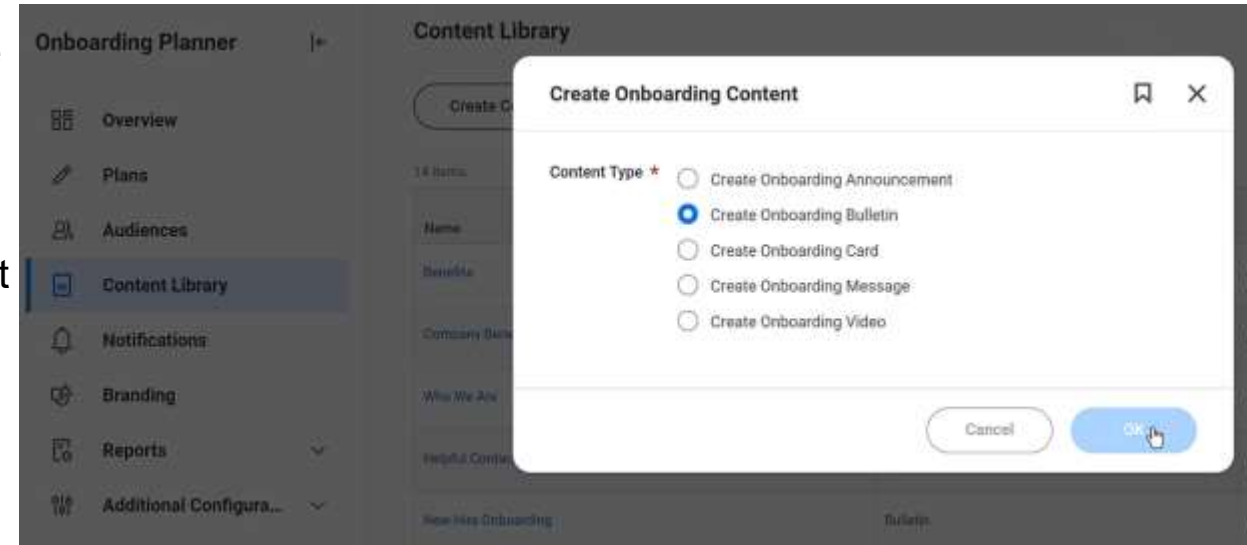
# Bulletins for Onboarding Plans

## Description

- Configure Bulletins within the onboarding experience to ensure your new hires can access the content you want to make visible and prominent in their onboarding plans.

## How this impacts you

- Bulletins within onboarding give you flexibility to surface the right content types, at the right moments, and to the right audiences, providing greater visibility of relevant onboarding content and giving you better control over how that content is presented.



## Impact to user groups

- Users configuring onboarding experience, new hires

## Regression Testing Recommended?

- Yes, if uptaking the feature

## HCM

# Candidate Availability for High Volume Recruiting

## Description

- You can now collect availability from the candidate of an external job application, enabling you to configure a candidate's availability and display it on the candidate grid.

## How this impacts you

- Feature allows for comprehensive way for hiring teams to manage and assess candidate work availability, streamlining the hiring process for high-volume roles.

## Impact to user groups

- Recruiters, Candidates

## Regression Testing Recommended?

- Yes, if uptaking the feature

The screenshot shows a web interface for setting availability. At the top, there is a link to 'Back to Job Posting' and a title 'Store Cashier - Weekday Mornings'. Below this is a progress bar with six steps: 'My Information', 'My Experience', 'My Availability' (the current step), 'Voluntary Disclosures', 'Self Identify', and 'Review'. The 'My Availability' section has the heading 'My Availability' and the instruction 'Select your availability to continue'. It notes that 'The time zone is based on the work location.' There is a checkbox for 'I'm flexible' which is currently unchecked. Below this is a 'Collapse All' link. The main part of the form is a list of days: 'Monday', 'Tuesday', and 'Wednesday'. Each day has a dropdown arrow to its left and a 'Select All' link to its right. Under each day, there is a time slot selector with a plus icon and the text '7:00 AM - 12:00 PM'. At the bottom right, there are 'Back' and 'Next' buttons.



## HCM

# My Conversations

## Description

- A new centralized location for a user's conversational notifications accessible from the Workday global header. A conversational notification informs users about new replies in ongoing conversations tied to specific Workday applications. At this time, My Conversations supports only Candidate Conversational Messaging for SMS.

## How this impacts you

The feature:

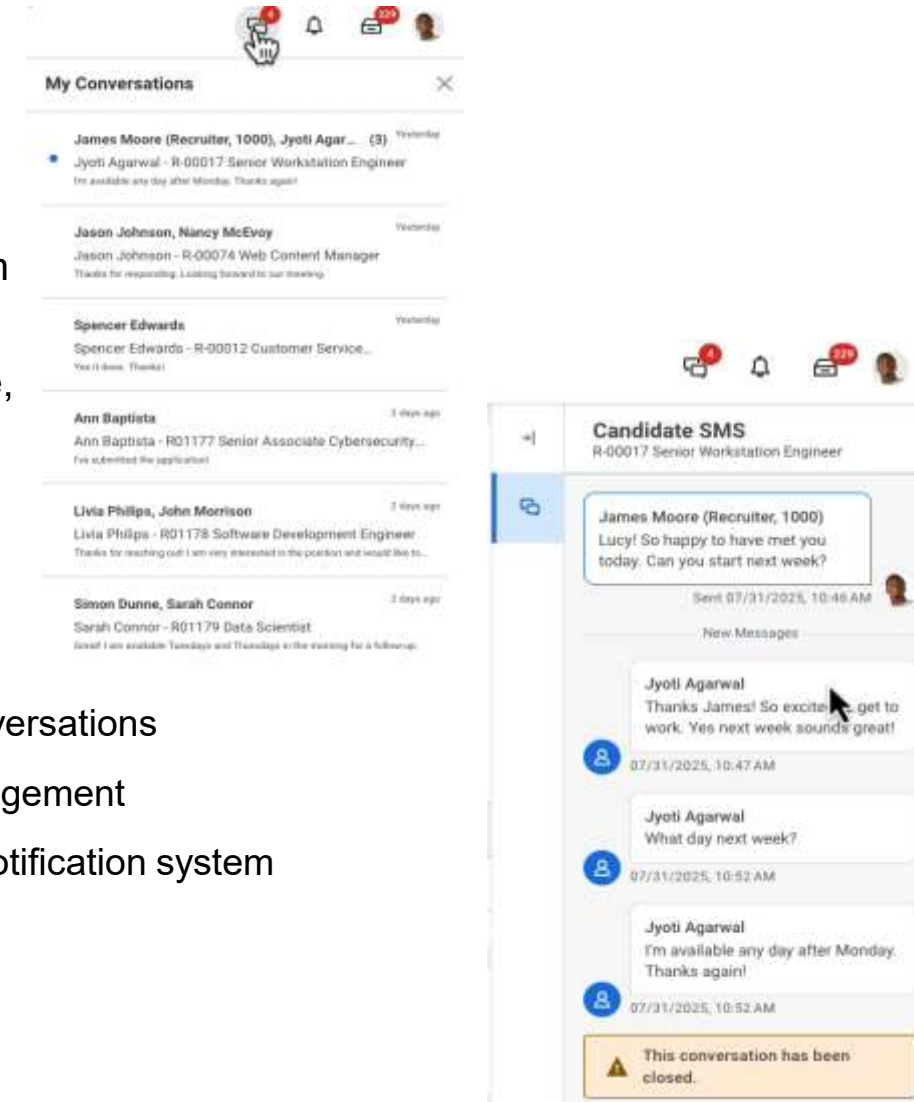
- Consolidates conversational notifications into a single, intuitive interface
- Streamlines the Notifications page by moving conversational notifications to My Conversations
- Ensures that important conversations are not overlooked, leading to better user engagement
- Is a clear foundation for integrating future comm. channels, via a unified/adaptable notification system

## Impact to user groups

- Recruiters

## Regression Testing Recommended?

- Yes, if uptaking the feature



# Learning

## HCM

# Skills Support on Cloud Connect for Learning Platform

### **Description**

- Workday now supports skills for the Cloud Connect for Learning platform, enabling 3rd-party content providers to include their skills data when integrating with WD Learning, allowing for a systematic mapping of the external skills to the WD Skills Cloud.

### **How this impacts your learners**

- Enhanced Learning Recommendations: by incorporating skills from external content, your learners will receive more relevant and personalized learning recommendations by Workday.
- Improved Career Development: The presence of skills on a wider range of content makes it easier for your learners to identify and pursue learning opportunities that align with their career goals and drive their professional growth.

### **Impact to user groups**

- Learners, Learning Administrators, Integration users.

### **Regression Testing Recommended?**

- Yes, if uptaking the feature

# Talent Optimization

## Talent Pipeline

# Give Requested Feedback: Generate Feedback Suggestions

### Description

- Workday now uses Google Vertex AI to enhance the Give Requested Feedback experience.
- Employees can leverage Generative AI to draft feedback using the Situation-Behavior-Impact (SBI) framework, making responses more structured and actionable.

### How this impacts you

- This update helps employees provide higher-quality feedback that is easier to write, more useful to recipients, and better supports meaningful performance conversations.
- It also improves overall communication and collaboration across the organization.

### Impact to user groups

- All employees providing or requesting feedback
- Managers and People Leaders
- HR/Talent Partners monitoring feedback quality

### Regression Testing Recommended?

- No

# Security

## Cross-Functional

# OAuth 2.0 Authentication for Custom SMTP Servers

### Description

- Authentication for custom SMTP servers using M. Outlook, providing an enhanced security protocol for sending Workday-generated emails. This enhancement addresses the industry-wide move toward more secure authentication protocols, demonstrated by Microsoft's upcoming deadline to deprecate basic authentication. It is a highly reliable security method able to create unique authentication tokens for each user, which can be immediately revoked & reissued if compromised.

### How this impacts you

- Enhanced security for sending Workday-generated emails. If you do not uptake this feature and are still using basic authentication with Microsoft Outlook for Customer SMTP after Microsoft stops supporting it, the connection to the custom SMTP could fail and emails could either fail to deliver or fall back to the Default Workday SMTP.

### Regression Testing Recommended?

- Yes

## Payroll

# Configurable Payroll Access for Non-Payroll Users

### Description

- Workday enables you to give non-payroll users, like HR/Benefits/Fin/Cost Center Managers access to payroll data that's relevant to their role through role-based, intersectional, or pay-component segment security configurations.

### How this impacts you

- This feature improves efficiency/reduces manual effort of sharing necessary payroll data across organizations, while still enabling you to restrict access to sensitive payroll data. Use a wide range of organizational attributes to define access, like business unit, cost center, region, or custom organizations.

### Impact to user groups

- Non-payroll users, who get granted access to payroll data using this feature

### Regression Testing Recommended?

- Yes, if uptaking the feature



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## HCM

# Updated Security on SSN Verification Service

### Description

- Workday updated the security for the output file of the Social Security Number Verification Service so that only workers with access on the new domain (View: Social Security Number Verification Integration Document) can access the output file that contains sensitive employee data:

### How this impacts you

- This feature improves protection of your employee's sensitive personal data. Workers who may have previously had access to the output file of the Social Security Number Verification Service will no longer have access unless they have access to the View: Social Security Number Verification Integration Document domain.

### Impact to user groups

- Workers who previously had access to the output file of the Social Security Number Verification Service

### Regression Testing Recommended?

- Yes

# Financial Accounting / FDM

## Common Financial Management – Financial Accounting

# Tax Details for Journal Lines Report Fields

### Description

New report fields were added on the Journal Line business object, which enable user to access the tax rate applications or payment tax rate applications for tax journal lines.. New report fields were also added on these business objects,

### How this impacts you

- New report fields can be utilized which enables users to access the corresponding tax Journal lines: Payment Tax Rate Application and Tax Rate Application

### Impact to user groups

- Accountants

### Regression Testing Recommended?

- no

# Procurement

## Procurement

### Intelligent Intake in Procurement

#### Description

- Workday now offers a centralized landing page for procurement requests through an intuitive interface called Intelligent Intake.

#### How this impacts you

- This single starting point for requesters provides smart assistance, minimizes data input, and simplifies the request process, showcasing intelligent Spend AI capabilities.

#### Impact to user groups

- Employee as Self, Accounts Payable Specialist

#### Regression Testing Recommended?

- No

# Customer Contracts

## Customer Contracts

# Gapless Customer Invoice Sequencing – Alternate Fiscal Schedule

### Description

- We update Workday's gapless document sequencing capability to enable you to create gapless customer invoice sequences for an alternate fiscal schedule. We add a new field on the Edit Company ID Definitions task that you can use to select an alternate fiscal schedule for gapless document sequencing.

### How this impacts you

- This feature helps you comply with local tax authority and statutory invoicing requirements, and reduce audit risk. It may also reduce manual work required to reconfigure the gapless sequence generator rule to adhere to alternate fiscal schedules.

### Impact to user groups

- Accounts Receivable Analysts

### Regression Testing Recommended?

- Yes

# Customer Accounts



## Customer Contracts

# Intercompany Multicurrency Netting

### Description

- We enable you to pay direct intercompany invoices in multiple currencies through a direct intercompany netting process. This new tab enables you to define which direct intercompany customer invoices can net against which direct intercompany supplier invoices between initiating and netting companies.

### How this impacts you

- This increases business efficiency by streamlining direct intercompany payments and reducing foreign exchange exposure.

### Impact to user groups

- Accounting

### Regression Testing Recommended?

- Yes

## Customer Contracts

# Customer Change History Reporting

### Description

- Workday delivers a new Reports: Customer Change History domain (secured to the Customers functional area) that you can use to secure access to information on the customer change history.

### How this impacts you

- This consolidates an audit trail for customer changes into a single report, promoting consistency and enhancing the user experience.

### Impact to user groups

- Accounts Receivable Analysts

### Regression Testing Recommended?

- No

PSA

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## Project Billing / Customer Contracts

# Transfer Ad Hoc Project Transactions

### **Description**

- With this release, we enable you to transfer ad hoc project transactions of any type (Time, Expense, Supplier Invoice, and Misc Expense) to other projects, using the Transfer Project Transactions and Manage Project Billing Transactions tasks.

### **How this impacts you**

- This feature provides the ability to make quick and easy adjustments (transfers) of ad hoc project transactions, reducing complexity and minimizing manual intervention needed to ensure accuracy of billed transactions.

### **Impact to user groups**

- Project Managers, AR, Project Billing

### **Regression Testing Recommended?**

- Yes

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## Projects, Time Tracking, Project Billing/PSA

# Time Block Deletion Prevention for Project Billing

### **Description**

- Workday gives you the ability to prevent the deletion of worker time blocks that have been billed or locked for revenue purposes.

### **How this impacts you**

- This feature prevents inadvertent or unauthorized deletion of billed time blocks, reducing reconciliation issues and improving accuracy.

### **Impact to user groups**

- Employee as self, Project Billing Specialists, Project Managers

### **Regression Testing Recommended?**

- Yes

# Adaptive

# Collaborate within Adaptive Planning

## New Features

- **In-app chat on dashboards:** Users can start and join conversations directly on dashboard widgets.
- **User tagging:** Mention colleagues in comments to draw attention or ask questions, triggering notifications.
- **Expanded notifications:** Tagged users receive alerts via Adaptive Planning and integrated apps like Slack.
- **Contextual navigation:** Notifications link directly to relevant comments and data views.
- **Comment filtering:** A filter icon lets users match dashboard filters to the original comment context.
- **Comment management:** Users can edit, sort, and delete their own comments and threads.
- **Admin controls:** Admins can delete any user comments in addition to using all chat features.



## Business Benefits

- **Streamlined communication:** Reduces reliance on external tools (email, chat apps, spreadsheets) by enabling direct, in-context collaboration.
- **Improved data clarity:** Conversations tied to specific widgets ensure everyone sees the same data view, minimizing misinterpretation.
- **Secure collaboration:** Discussions stay within Adaptive Planning's access framework, enhancing data security and compliance.
- **Faster decisions:** Real-time, targeted communication accelerates issue resolution and decision-making.

# Version-Specific Overrides for Linked Accounts



The 2025R2 release of Adaptive Planning introduces version-specific overrides for linked accounts, allowing users to enable or disable data entry for specific plan versions. This flexibility lets businesses maintain linked accounts where needed while enabling manual data input, imports, or predictive forecasting in other versions. New settings in the Link Filters section of account configurations—such as override checkboxes, version selectors, and override options—are available for Cube Standard, Cube-Entered, General Ledger, and Custom accounts. These enhancements streamline data management, support varied planning needs, and improve integration with loaders and APIs for preview tenants, while maintaining visibility during actuals overlay periods.



## Key Highlights:

- Ask questions in natural language and get context-aware answers.
- Use smart prompts, type-ahead suggestions, and full-screen mode.
- Access how-to guidance for tasks like ML forecasts, scenario reviews, and currency changes.
- Boosts user adoption and speeds up decision-making by simplifying access to planning insights.

**Ask Workday** introduces an AI-powered, natural language interface that allows users to interact with Adaptive Planning more intuitively. It delivers contextual help, smart prompts, and type-ahead suggestions, enabling users to ask questions and receive relevant, concise answers without disrupting their workflow. This conversational tool enhances productivity, supports strategic decision-making, and reduces reliance on support teams by making complex planning tasks more accessible.

# Multicoordinate Support for Cell Explorer

This Adaptive update enhances Adaptive Planning dashboards and reports by allowing users to drill into detailed account, level, and dimension data even when multiple selections are made in filters. This improvement enables more granular analysis and faster root cause identification directly from aggregated data views. Users can now explore combinations of dimension and level values across hierarchies, with guided selections that reduce errors and manual effort.

- 🔍 **Key Enhancements:**
- Supports multiselect filters across dimensions and levels.
- Displays all dimensions and attributes in Cell Explorer.
- Adds “Rolls up to,” “Show All,” and “Hide All” links for better navigation.
- Suppresses zero/blank rows by default for multiselect views.
- Renames the “Level” section to “Levels” for clarity.
- These changes streamline data exploration, improve accuracy, and eliminate the need for external tools like pivot tables or manual exports.



POSSIBLE (RE)DEFINED  
**Questions?**

LET'S  
**TALK**  
**WORKDAY**