Let's Talk Workday 2026 Release 2:

Putting Workday AI to Work

2026R2 Overview

IMPORTANT DATES

You are here!

Friday August 7, 2026
Feature Release documentation released

August 15, 2026
Preview Release

August 15 – Sept 19, 2026
Release preparation window

September 19, 2026
Production Release

FEATURE STATS

601
TOTAL FEATURES

13
Coming Soon

339
Feature

176
Fix

73
Retirement

FEATURES BY PRODUCT AREA

Financial Management	149
Human Capital Management	115
Platform and Product Extensions	103
Payroll	86
Student	58
Talent Management	47
Adaptive Planning	34
Spend Management	34
Analytics and Reporting	16
Workday Peakon Employee Voice	3

Goal of today: focus on AI features released during 2026R2 and their impact

Disclaimer

Armanino is so happy to support you growing your knowledge on the features coming out in the Workday Release! The information shared in this presentation is intended for general awareness and is based on Workday's planned or upcoming functionality. While certain features may become automatically available in your tenant, it is the responsibility of each organization to review, assess, and determine the applicability and impact of these features within theirown tenant and employee population. You should conduct your own testing, validation and research to ensure these features align with your business processes, compliance requirements, and organizational needs.

HCM: Core HR, Talent, PEX, Payroll, Benefits

Release Note Self-Service Agent August 2026 Enhancements

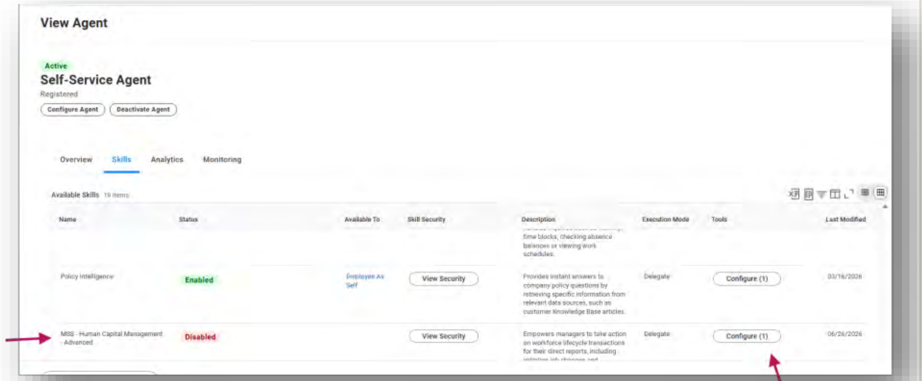
2026R2 | Human Capital Management, Financial Management | Self Service Agent, Expense Management, Expenses

High-level information

With this update, we continue to enhance the versatility of the Self-Service Agent by adding support for new tools, personalized agent responses, better backend processing and more.

How this impacts the client

If you haven't already, enable the Self Service Agent!
If Self Service Agent is already enabled, go enable the new skills!



Important Notes

Agent Interaction Enhancements We improve the quality of your agent interactions by delivering these performance and user interface enhancements:

- Add attachments for the Change Personal Information Tool
- Expand the list of languages SS Agent supports
- Add Dependent
- Change Dependent
- Delete Dependent
- Continue Journey
- Manage Goals for Self
- View Learning Content
- View recommended learning
- View Continue Learning
- View Learning Assignments
- View My Learning Transcript
- View Tax Form Details
- Get Tax Elections
- Create Manual Expense
- Submit Expenses
- View Team Members
- View My Team

Client takeaway The Self-Service Agent now enables you and your employees to complete more self-service tasks even quicker with higher response accuracy and more robust capabilities.

Human Capital Management

Self Service Agent, Expense Management, Expenses

Regression Testing: Not 100% necessary, but easy to play around with if you already have SS enabled!

Change touches configuration, reporting, integrations, or process behavior.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Core Reporting Agent

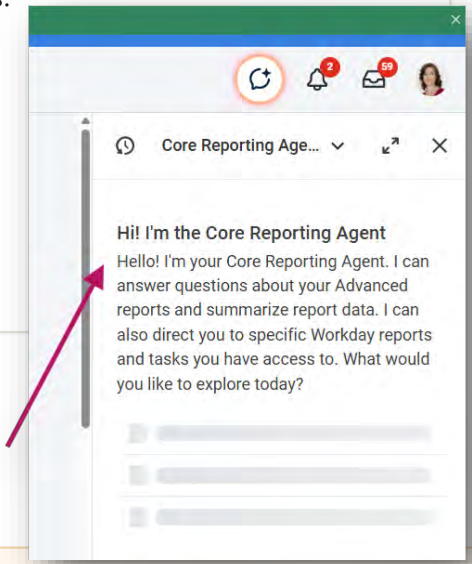
2026R2 | Platform and Product Extensions | Reporting and Analytics

High-level information

Transforms supported reports into interactive conversations so users can ask questions, explore results, refine analysis, and navigate to relevant reporting content.

How this impacts the client

Requires agent enablement and configuration. Clients should identify appropriate advanced reports, confirm report security, and define which reports are eligible for agent-assisted analysis.



Client discussion points

- Supports conversational analysis of standard and custom advanced reports.
- Uses the report data and security already available to the user.
- Best results depend on accurate report design and appropriately scoped datasets.
- Update enablement materials with example prompts and usage boundaries.

Client-ready takeaway

This feature helps you seamlessly integrate AI and agentic capabilities into your custom report analysis.

Platform and Product Extensions

Analytics and Reporting

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-07-03
Production	2026-09-19

Preview Production

Release Note Adoption Agent

2026R2 | Platform and Product Extensions | Platform and Product Extensions

High-level information

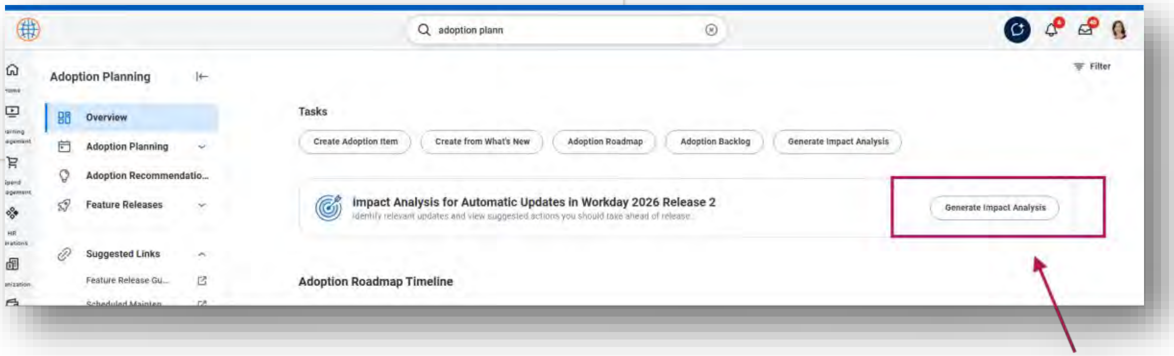
This release-note item adds an adoption-focused capability intended to help organizations guide users and improve how new Workday functionality is introduced and consumed.

How this impacts the client

The Adoption Agent streamlines release preparation and helps support system stability by identifying potential impacts to your tenant. You can use the agent to identify upstream and downstream dependencies impacted by a change and to review tests based on your tenant's configuration.

Important Notes

- New Generate Impact Analysis button to the overview page on the Adoption Planning
- Workday provides the Impact analysis for Automatic Updates prompt
- New analysis reports to the new impact analysis reports
- If you've done any customization to Adoption Planning you may have to manually add this



Client-ready takeaway

The feature can strengthen Workday adoption when it is paired with clear ownership, curated guidance, and a deliberate rollout plan rather than enabled as a standalone technology change.

Platform and Product Extensions

Cross Functional

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2027-03-13

Preview — Production

Release Note Frontline Agent

2026R2 | Platform and Product Extensions | Business Process

High-level information

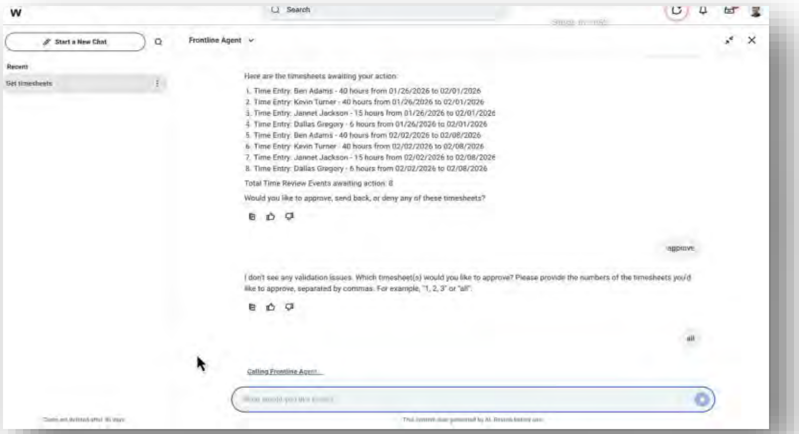
With this release, we introduce the Frontline Agent, a new AI-powered assistant that enables frontline workers to manage frequent workflows more efficiently using AI.
The first available agent skill, Time Approval Optimizer, enables managers and time approvers to review, approve, deny, and send back timesheets using natural language interactions. The agent identifies routine timesheets that are ready for approval and flags

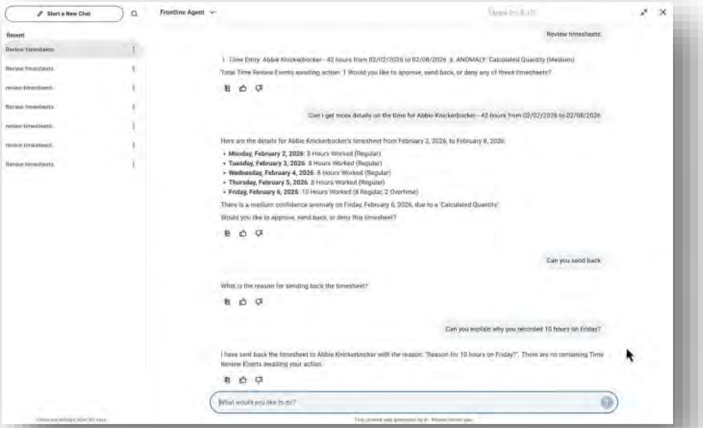
How this impacts the client

This feature reduces the administrative burden on time approvers by automatically approving routine timesheets and highlighting only those that deviate from expected schedules or historical behavior. This improves payroll accuracy and lowers labor costs, particularly in high-volume industries with hundreds of weekly reviews.

Important Notes

Activate agent through your Agent management hub!





Client-ready takeaway

This feature helps you seamlessly integrate AI and agentic capabilities into your time sheet approval process.

Platform and Product Extensions

Time Tracking

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-02-07
Production	2026-06-26

Preview — Production

Release Note Workday Wellness

2026R2 | Human Capital Management | Wellness Ecosystem, Wellness Insights

High-level information

With this release, we deliver the new Workday Wellness product. Workday Wellness enables:

- You to connect your tenant to a benefit partner ecosystem to exchange worker demographic, enrollment, and absence data.
- Wellness partners to push benefit plans and worker communications into Workday automatically.
- Wellness Insights Hub also provides a centralized location in Workday where you can easily access data for benefits, partners, plans, and workers

How this impacts the client

Workday Wellness simplifies benefits administration, reduces manual work, and lowers the total cost of managing benefits by enabling you to:

- Discover new benefit partners
- Setup plans more quickly
- Easily connect with benefit partners without building integrations
- Provide benefit leaders with insights to help control costs and improve employee outcomes

Important Notes

This is not meant to be a giant lift and shift from CCB or your current benefit setup to Workday Wellness, as Workday gains more partners, this can be a slow transition to Workday's new API format for benefits

Client-ready takeaway

Workday Wellness simplifies benefits administration, reduces manual work, and lowers the total cost of managing benefits by enabling you to: • Discover new benefits partners. • Set up plans more quickly.

Workday Wellness Product Page: https://community-content.workday.com/content/workday-community/en-us/emerging-products-and-features/products/workday-wellness-product-center.html?lang=en-us

Human Capital Management

Wellness Ecosystem, Wellness Insights

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Payroll skill updates

2026R2 | Payroll | Payroll for the United States

High-level information

With this update, we continue to enhance the capabilities of the Self-Service Agent (SSA) by expanding support

- For the Payroll skill to include California and New York state tax withholding elections, as well as federal W-4 withholding data
- For the Payroll skill to include support to query specific box values for the U.S. W-2 Wage and Tax Statement
- For the Payroll skill to include Canadian year-end tax document details

How this impacts the client

- Delivers state and federal tax withholding election retrieval support under the ESS – Payroll – Base skill in the Self Service Agent. Prompts 'What are my current federal W-4 tax withholding elections'
- Delivers US W2 Tax document retrieval support under the ESS – Payroll – Base skill in the SSA. Prompt 'What is on Box 1 of my W-2 for 2025'
- Delivers Tax document retrieval support under the ESS – Payroll – Base skill in the SSA. Prompt 'What is on my T4 for 2025'

Important notes

These are new skills that need to be enabled under the Self Service Agent!

Client-ready takeaway

This update continues to support reduced case volume and administrative overhead by enabling workers to securely access their current federal and state tax withholding election details in real time through a conversation

Payroll

Payroll for the United States

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Minimum Wage Analysis Skill for the Payroll Agent

2026R2 | Payroll | Payroll for the United States

High-level information

With this release, we continue to deliver updates to the Minimum Wage Analysis Skill for the Payroll Agent by adding support for U.S. local authorities.

How this impacts the client

These updates improve efficiency for payroll operations by enabling you to find relevant and up to date local minimum wage payroll data more easily in Workday and take actions to resolve issues that may impact your payroll.

Important Notes

New fields!

- Payroll Tax Authority Display ID
- Payroll Tax Authority Minimum Wage Exists

Tools for Minimum Wage Skill

- What's Oaklands minimum wage?
- What's San Francisco's minimum wage on 1/1/24?
- What are my employer costs

Client-ready takeaway

These updates improve efficiency for payroll operations by enabling you to find relevant and up-to-date local minimum wage payroll data more easily in Workday and take actions to resolve issues that may impact your payroll

Payroll

Payroll for the United States

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note AI Generated Journeys

2026R2 | Human Capital Management | Journey Paths

High-level information

With this release, you can create journeys from a name, business intention, target audience, and selected Workday resources reducing manual configuration and curation time.

How this impacts the client

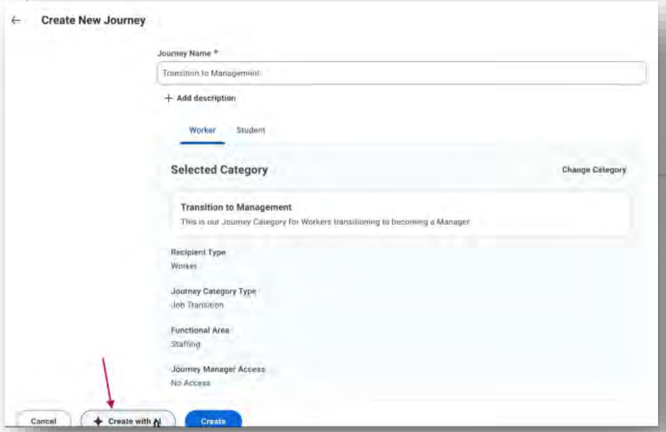
You can now:

- Prompts: Create journeys with **Create with AI** by entering a **Journey Name**, **Select a Category**, and business intention prompts.
- **Journey Intention** Prompt: Describe the goal, outcome, or purpose of the specific journey to achieve. Be as specific as possible to generate relevant content.
- **Suggested Intentions**: select pre-built intention prompts built by Workday such as Mid-Year Calibration and Pivot or Cross-Functional Lateral Move.
- **Relevant Sources**: Incorporate relevant articles, documents, learning content, links, reports, tasks, and videos.
- Generation Control: Preview the generated journey, monitor progress, or cancel a journey at any time.

Important Notes

Pre Reqs and security for this feature include:

- Give modify permissions to AI generated journeys
- Then access the Journeys workspace and create Journey > build your Journey > enter your journey name and select create with AI



Client-ready takeaway

This functionality accelerates curation and setup, reduces time to value, and increases feature adoption. You can now focus on content strategy rather than manual configuration and setup of a journey.

Human Capital Management

Journey Paths

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-09-04
Production	2026-09-19

Preview — Production

Release Note Generate Individual Goals

2026R2 | Talent Management | Performance Enablement

High-level information

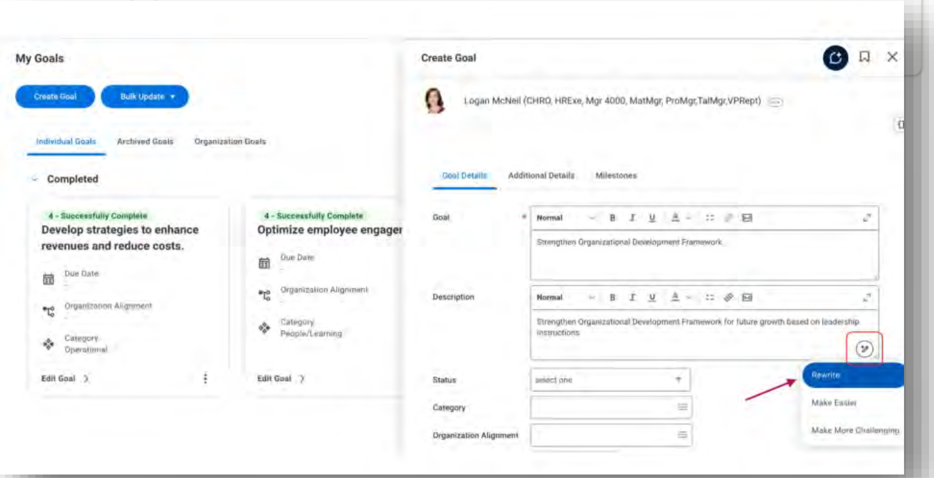
With this update, Workday delivers AI-assisted goal description suggestions for individual goals. This feature utilizes a large language model (LLM) to align a worker's goal description with the SMART (Specific, Measurable, Achievable, Relevant, Time-Bound) framework using the worker's job and talent data.

How this impacts the client

Setup Required You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your subscription service agreement: • Select your profile avatar on Community.

Client discussion points

We deliver SMART goal description suggestions for individual goals. This feature uses AI to analyze the worker's talent data from the last 18 months and details from the worker's job profile to generate goal description...



Client-ready takeaway

This update: • Increases the quality of individual goals. • Reduces effort to create individual goals.

Talent Management

Performance Enablement

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-07-31
Production	2026-10-02

Preview Production

Release Note Generate Flex Team Descriptions

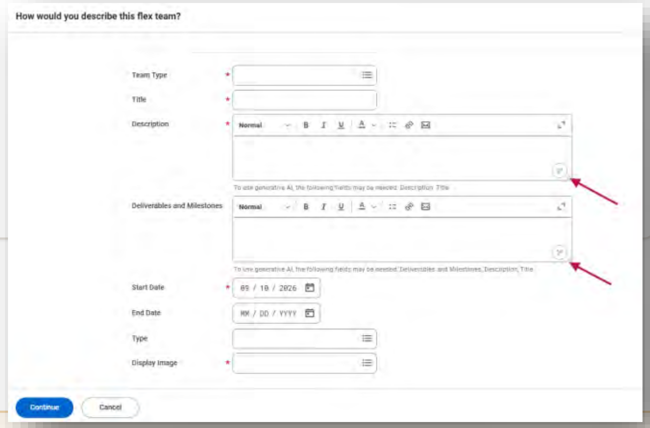
2026R2 | Talent Management | Growth and Mobility

High-level information

With this release, Workday enhances flex team creation with AI assistance. When creating, editing, or revising flex teams, hosts can use AI writing prompts to generate and modify content in the Description and Deliverables and Milestones fields.

How this impacts the client

We reduce the time and effort needed to create a flex team. Hosts can quickly create flex teams with high-quality, consistent, action-oriented details. For simple flex teams, improving the description also helps hosts get relevant suggested skills for the team.
As a result, it’s easier for candidates to find appropriate teams and contribute to successful outcomes.



Important Notes

Generate with AI prompt now available for:

- Create Flex Team
- Edit Flex Team
- Revise Flex Team

Can be used in the fields

- Description
- Deliverables and Milestones

Client-ready takeaway

We reduce the time and effort needed to create a flex team. Hosts can quickly create flex teams with high-quality, consistent, action-oriented details.

Talent Management

Growth and Mobility

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Invoke Agents from Business Process Framework

2026R2 | Platform and Product Extensions | Business Process

High-level information

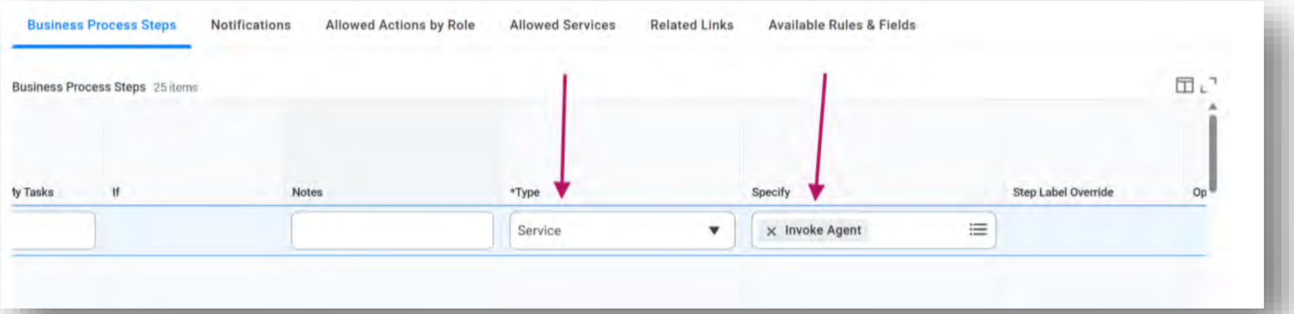
You can now configure business process service steps to invoke AI agents directly within the Business Process Framework, enabling automated agent workflows during business process execution. This applies to Managed Agents created in Extend. It also applies to Agents delivered by Workday if Workday has delivered pre-configured inputs for the Agent.

How this impacts the client

Setup Required To invoke agents from the Business Process Framework: • Configure Agent Inputs (Workday Extend Agents Only): Access the new Configure Business Process Agent task to create the required Agent Inputs for Managed Agents created in Workday Extend and deployed to your tenant.

Important Notes

Business Process Configuration and Setup • New Agent Input Tasks: We deliver a new Configure Business Process Agent task (secured to the Workday Extend domain) that enables you to create Agent Inputs for Managed Agents...



Client-ready takeaway This feature helps you seamlessly integrate AI and agentic capabilities into your business processes.

Platform and Product Extensions

Business Process

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-07-03
Production	2026-09-19

Preview Production

Release Note Change Personal Information with Attachments Using Self-Service Agent

2026R2 | Human Capital Management | Core Human Capital Management

High-level information

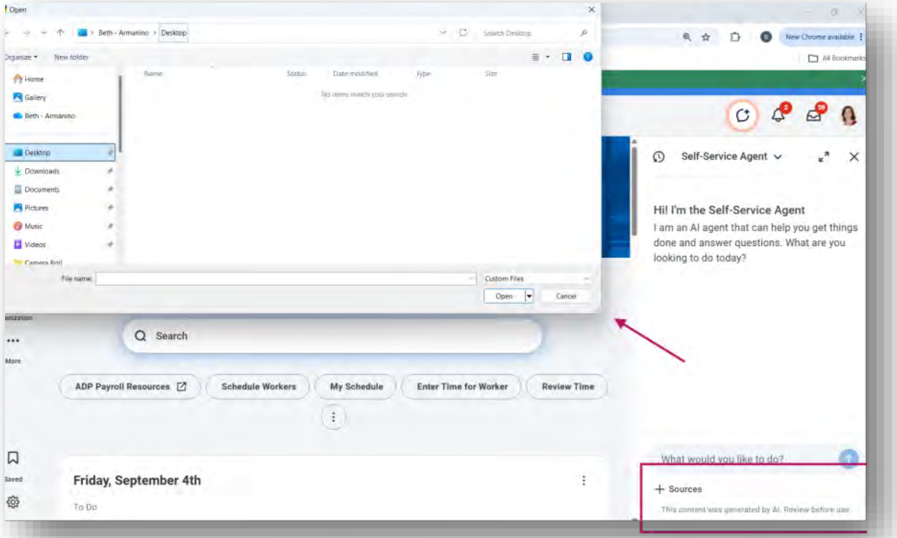
With this update, we continue to enhance the capabilities of the Self-Service Agent by enabling you to add attachments when changing your personal information.

How this impacts the client

Setup Required • Set up the Self-Service Agent. • Enable the ESS - Human Capital Management - Advanced skill. • Provide users with the access to the Worker Data: Public Worker Reports domain in the Staffing functional area so that they can access the change_personal_information tool.

Important Notes

We update the change_personal_information in the ESS - Human Capital Management - Advanced skill to now enable you to change personal information with attachments.



Human Capital Management

Core Human Capital Management

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-10-02

Preview Production

Client-ready takeaway

The Self-Service Agent now enables you to complete a change personal information request that requires one or multiple attachments, and also provides you with the flexibility to add optional attachments.

Financials

Workday 2026R2 Financials | Release at a Glance

A practical release balancing innovation with continued refinement of the Financials foundation.

POSITIONING

Innovation plus platform maturity

Automation & AI

Revenue Contract Agent, AI-supported receipt risk indicators, self-service enhancements, and broader workflow automation.

Controls & Compliance

Stronger approval routing, tax processing, currency-rate governance, revenue recognition, and accounting safeguards.

Analytics & Visibility

Custom Business Views, Unified Banking Categories, project-cost analysis, and more actionable operational reporting.

Platform Maturity

A broad set of fixes and refinements improves performance, reconciliation accuracy, OCR processing, integrations, and reliability.

CONTINUOUS IMPROVEMENT EXAMPLES

Faster customer payment auto-application • Customer payment reversal and write-off corrections • Deposit journal error prevention • OCR document classification and cleanup • Purchase order linking and recurring-service accrual refinements

Client-ready takeaway: 2026R2 introduces targeted innovation while also resolving edge cases and improving the day-to-day stability of existing Financials capabilities.

Financials Standouts | AI, Analytics & Advanced Capabilities

2026R2 | Financial Management | Select Highlights

Revenue Contract Agent

AI extracts key data from signed contract documents, creates draft customer contracts, and supports questions about the contract PDF in Workday Chat.

PRIMARY AI STORY

Expense Protect AI Risk Scoring

Machine learning risk indicators help reviewers identify potentially AI-generated or tampered receipts and focus follow-up review.

AI + AUDIT OVERSIGHT

Custom Business Views

Blend selected Financials objects on live Workday data through a Prism-style preparation experience, without requiring Prism Analytics.

ADVANCED ANALYTICS

Unified Banking Categories

Standardize balances across bank statement formats and strengthen Book-to-Bank comparison and reconciliation visibility.

TREASURY & CASH

Dynamic SSP Rules

Formula-based standalone selling price calculations support complex revenue allocation under ASC 606 and IFRS 15.

ADVANCED REVENUE

Optional verbal mentions: Self-Service Agent enhancements, automated VAT netting, and Kyriba payment and reconciliation improvements.

Release Note Revenue Contract Agent | Overview

2026R2 | Financial Management | Revenue Contract Agent

High-level information

The Revenue Contract Agent extracts key data from customer contract documents and populates customer contract headers and lines in Workday. It also provides context-aware answers about the contract PDF currently being viewed.

Contract Creation skill

- Create new contracts from uploaded signed PDFs.
- Update existing draft contracts from documents.
- Review generated drafts and source PDFs side by side.
- Trace populated fields to highlighted source text through annotations.

Revenue Contract Insights skill

- Ask natural-language questions about the contract being viewed.
- Receive context-aware answers in Workday Chat.
- Access the skill from Edit Customer Contract.
- Applies to drafts created through Contract Creation.

Client-ready takeaway

The agent combines document extraction, traceable review, and conversational insights to reduce effort in customer contract creation while keeping users in the Workday review process.

Setup: Setup Required | Contract Intelligence access and Flex Credits required

AI

Financial Management

Revenue Contract Agent

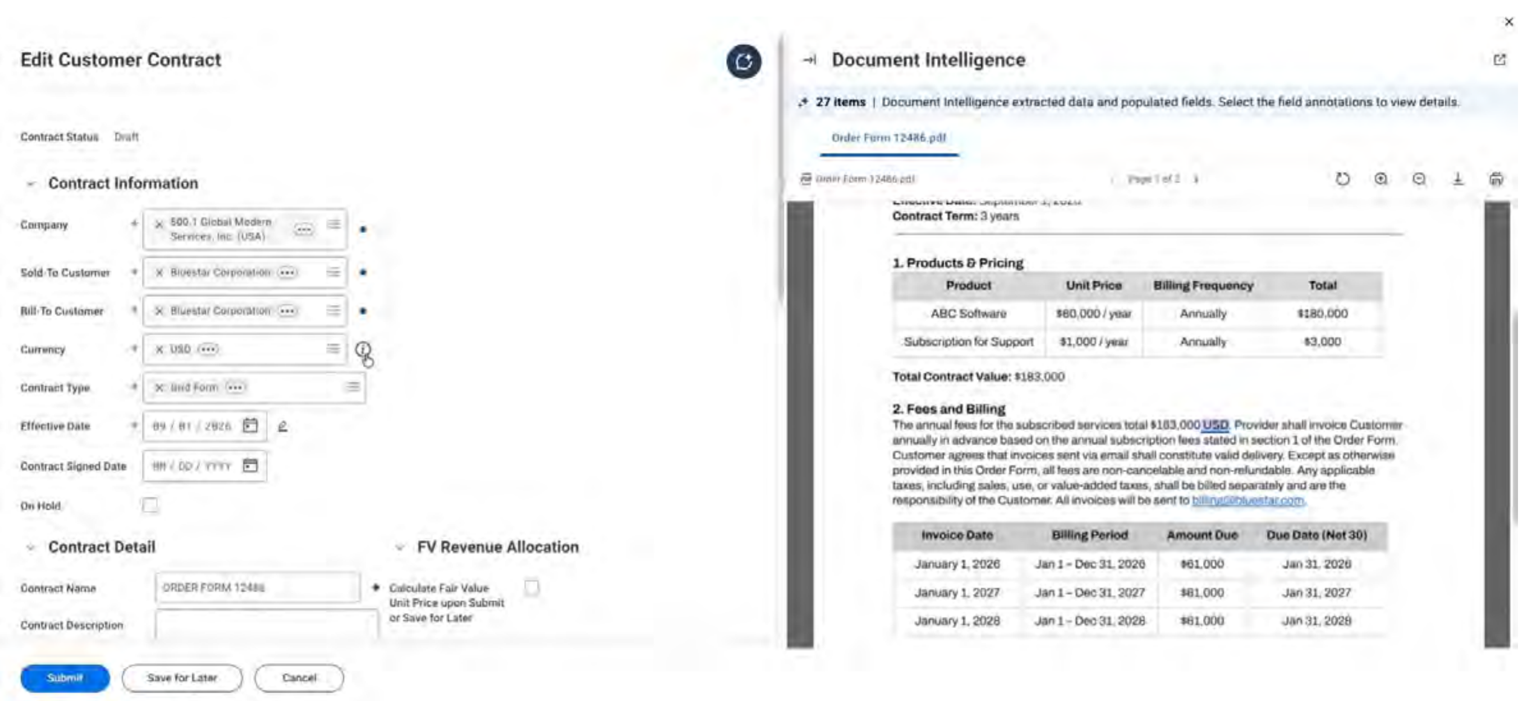
Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-21
Production	2026-09-19

Revenue Contract Agent | Create, Extract & Review

2026R2 | Financial Management | Contract Creation Skill



Side-by-side review links populated Workday fields to highlighted source text in the PDF. Users can inspect annotations, review extracted values, and accept or reject additional suggested values.

WORKFLOW **Create from Document → Processing notification → Edit Customer Contract → Review annotations**

AI

Financial Management

Contract Creation Skill

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-21
Production	2026-09-19

Revenue Contract Agent | Scope, Setup & Governance

2026R2 | Financial Management | Configuration and Enablement

Configurable extraction scope

The configuration task controls which eligible header and line fields the agent extracts. Header examples include customers, currency, dates, name, description, amount, payment terms, payment type, and PO number.

Supported contract lines

Goods and services lines support item, description, quantities, units, pricing, dates, company, and commodity code. Usage-based lines support item, description, quantity, unit, amount, dates, company, and commodity code.

Scope, monitoring & reporting

Contract Creation supports all line types except project, prepaid, and intercompany. Revenue Hub shows uploaded documents, processing status, and generated contracts. A report field identifies agent-generated contracts.

What clients need to do

- Have Workday Contract Intelligence access.
- Complete required UMSA steps.
- Configure Agent System of Record and register the agent.
- Enable both skills.
- Configure security and extraction fields.
- Plan for Workday Flex Credits.

SECURITY **The new Set Up: Revenue Contract Agent domain secures access to the configuration task.**

AI

Financial Management

Configuration & Governance

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-21
Production	2026-09-19

Release Note Expense Protect: Potential AI-Generated Receipt Risk Score Report Field

2026R2 | Financial Management | Expenses

High-level information

Workday enhances Expense Protect to calculate machine learning risk scores for potentially fraudulent or AI-generated receipts and provide context-aware risk insight descriptions for reviewers.

How this impacts the client

Setup Required. The scores are risk indicators that support review and are not determinations of document authenticity. Customers should align reviewer guidance, security, and investigative procedures before adoption.

Client discussion points

• Flags potentially AI-generated or tampered receipts using machine learning risk indicators.
• Provides clearer, context-aware descriptions to focus reviewer follow-up.
• Strengthens expense fraud mitigation and audit oversight without replacing reviewer judgment.

Client-ready takeaway

Expense Protect applies AI to a practical finance control by helping reviewers focus attention on higher-risk receipts while preserving human judgment.

Setup: Setup Required | Audience: Finance, Accounting, and Functional Administrators

FINS

Financial Management

Expenses

Regression Testing: YES

Type	Feature
Tenant	Preview
Preview	2026-08-21
Production	2026-09-19

Setup Required

Release item selected for Financials highlights.

Release Note Custom Business Views for Financials

2026R2 | Financial Management

High-level information

Customers can blend data from select Workday Financial Management business objects into custom business view data sources using an interactive data preparation experience similar to Prism Analytics.

How this impacts the client

Setup Required. The capability is available to Workday Financial Management customers and does not require the Prism Analytics product. Customers should identify priority reporting use cases and review data access.

Client discussion points

• Builds custom business views on live Workday data.
• Uses an interactive, Prism-style data preparation experience.
• Expands analysis without requiring a separate Prism Analytics subscription.
• Supports faster reporting and better business decisions.

Client-ready takeaway

Custom Business Views brings more flexible, live-data analytics to Financials customers and lowers the barrier to combining Financial Management data for reporting.

Setup: Setup Required | Audience: Finance, Accounting, and Functional Administrators

FINS

Financial Management

Prism Analytics

Regression Testing: YES

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Setup Required

Release item selected for Financials highlights.

Release Note Multiformat Account Balance Reporting with Unified Banking Categories

2026R2 | Financial Management | Banking and Settlement | Cash Management

High-level information

Workday enhances Normalized Balances, renamed Unified Banking Categories, to report bank statement balances across banks regardless of statement format and improves the Book to Bank Summary Report.

How this impacts the client

Automatically Available. Workday automatically migrates existing normalized bank balance categories and mapping sets. Customers should review migrated mappings and validate Book to Bank results in Preview.

Client discussion points

• Maps multiple format-specific statement type codes to a common banking category.
• Delivers ready-to-use categories and mappings across supported bank statement formats.
• Compares Workday-calculated balances with bank-reported balances.
• Reduces manual aggregation across accounts, currencies, and files.

Client-ready takeaway

Unified Banking Categories strengthens global cash visibility by standardizing inconsistent bank formats and improving Book-to-Bank comparison.

Setup: Automatically Available | Audience: Finance, Accounting, and Functional Administrators

FINS

Financial Management

Cash Management

Regression Testing: YES

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Automatically Available

Release item selected for Financials highlights.

Release Note Dynamic Standalone Selling Price and Revenue Allocation Rules

2026R2 | Financial Management | Customer Contracts | Revenue Recognition

High-level information

Workday expands Revenue Recognition - Advanced with formula-based pricing to calculate standalone selling prices for multiple-element revenue allocation under ASC 606 and IFRS 15.

How this impacts the client

Setup Required. Customers using advanced revenue recognition should evaluate current SSP calculations, residual approaches, and contract line scenarios before configuring the new rule builder.

Client discussion points

• Configurable formulas calculate SSP for license, services, and usage contract lines.
• Supports residual value calculations.
• Reduces manual tasks and workarounds for complex revenue arrangements.
• Improves allocation accuracy and reduces compliance risk.

Client-ready takeaway

Dynamic SSP rules provide more flexible revenue allocation for complex contracts, particularly for software, subscription, and usage-based business models.

Setup: Setup Required | Audience: Finance, Accounting, and Functional Administrators

FINS

Financial Management

Customer Contracts

Regression Testing: YES

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Setup Required

Release item selected for Financials highlights.

Adaptive Planning

Release Note Adaptive Planning MCP Server

2026R2 | Adaptive Planning | Core Planning - Modeling, Core Planning - APIs

High-level information

Workday Adaptive Planning now provides an MCP Server that enables customer AI agents to access Adaptive Planning data and model context through a secure, standardized interface. To use the Adaptive Planning MCP server in Preview, you must opt in to the Universal Main Service Agreement (UMSA).

How this impacts the client

Setup Required No action is required unless you want your AI agents to connect to Adaptive Planning MCP.

Client discussion points

• Customers can now connect their AI agents to the Adaptive Planning MCP Server. • The MCP Server exposes these tools. Available tools vary by user permissions, access rules, and tenant configuration.

Client-ready takeaway

• Enables customers to connect their AI agents to Adaptive Planning without building custom point-to-point integrations.

Setup: Setup Required | Audience: Manage Plans & Models

Adaptive Planning

Core Planning - Modeling, Core Planning - APIs

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Relative Time Periods in Workday for Google Sheets

2026R2 | Adaptive Planning | Core Planning - Google Workspace

High-level information

With this release, you can add relative time periods to reports in Workday for Google Sheets that automatically adjust based on a report date, in addition to existing absolute time periods.

How this impacts the client

Automatically Available To utilize the new Relative Time Periods, ensure you have the latest version of the Workday for Google Sheets add-on installed. When you don't upgrade to the latest supported version of Workday for Google Sheets, you can’t utilize the new Relative Time Periods functionality.

Client discussion points

We make these updates: • We add a new Report Date field to the task pane in Workday for Google Sheets, enabling you to set and change the anchor date used to resolve relative time periods in a report.

Client-ready takeaway

Relative time periods enable you to build a report once and reuse it across reporting periods, such as month-end or quarter-end reviews, without manually updating every time element each period.

Setup: Automatically Available | Audience: Analytics & Reporting

Adaptive Planning

Core Planning - Google Workspace

Regression Testing: YES

Client should validate the change in preview before production.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Adaptive Planning Notification Preferences

2026R2 | Adaptive Planning | Core Planning - Dashboards

High-level information

With this release, Workday Adaptive Planning users can manage notification preferences by category and channel on the Manage Notifications page. You can enable or disable delivery through email, Slack, and Microsoft (MS) Teams for each supported notification category. Preference changes save automatically.

How this impacts the client

Automatically Available The Email option displays by default. Administrators must configure Slack or MS Teams integrations before users can manage those channels. End users must review notification preferences and connect Slack or Teams accounts to use those channels. • You continue to receive notifications in the Adaptive Planning inbox.

Client discussion points

End users can: • Click the notification bell icon and open Manage Notifications to access the new notification preferences. • Manage preferences for these notification categories.

Client-ready takeaway

• Gives users control over where they receive Adaptive Planning notifications, so they can focus alerts in the tools they use most.

Setup: Automatically Available | Audience: Plans & Budgets

Adaptive Planning

Core Planning - Dashboards

Regression Testing: YES

Client should validate the change in preview before production.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview — Production

Release Note Adaptive Planning Apply Changes

High-level information

When you update values and click Apply on the Filters pop up on Hub report pages in Adaptive Planning, we now correctly apply your changes.

How this impacts the client

When you update values and click Apply on the Filters pop up on Hub report pages in Adaptive Planning, we now correctly apply your changes.

Client discussion points

Review configuration, reporting, integrations, and impacted users to determine whether the release note applies to your tenant.

Client-ready takeaway

When you update values and click Apply on the Filters pop up on Hub report pages in Adaptive Planning, we now correctly apply your changes.

Setup: Not specified | Audience: Product-Specific Analytics & Reporting

Adaptive Planning

Product Area Not Specified

Regression Testing: NO

No dedicated regression scenario is indicated in the source note.

Type	Fix
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview — Production

Release Note Accounting Journals with Book Codes

2026R2 | Adaptive Planning | Adaptive Planning and Consolidation

High-level information

Workday incorrectly returned this error when you ran these web services to import accounting journals with book codes, A Book Code can only be selected if the Ledger Type is Actuals: • Import Accounting Journal • Submit Accounting Journal

How this impacts the client

This impacted journals with book codes on: • An obligation ledger, or • A commitment ledger.

Client discussion points

Suggested regression scenario: Use the web services to import an accounting journal in the impacted population, and verify that we no longer return the error.

Client-ready takeaway

We no longer return the error.

Setup: Not specified | Audience: Workday API, Accounting

Adaptive Planning

Adaptive Planning and Consolidation

Regression Testing: YES

Release note includes test scenarios.

Type	Fix
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview — Production

Release Note Filter Custom SQL Column

2026R2 | Adaptive Planning | Core Planning - Integration Management

High-level information

When you filter a staging table column that uses custom SQL and references another custom SQL column, Workday no longer incorrectly returns this error: A circular column reference was found in the SQL Expression. SQL Column "[column name]" is directly/indirectly self referenced within its expression.

How this impacts the client

When you filter a staging table column that uses custom SQL and references another custom SQL column, Workday no longer incorrectly returns this error: A circular column reference was found in the SQL Expression. SQL Column "[column name]" is directly/indirectly self referenced within its expression.

Client discussion points

Review configuration, reporting, integrations, and impacted users to determine whether the release note applies to your tenant.

Client-ready takeaway

When you filter a staging table column that uses custom SQL and references another custom SQL column, Workday no longer incorrectly returns this error: A circular column reference was found in the SQL Expression. SQL Column "[column name]" is directly/indirectly self...

Setup: Not specified | Audience: Plans & Budgets

Adaptive Planning

Core Planning - Integration Management

Regression Testing: NO

No dedicated regression scenario is indicated in the source note.

Type	Fix
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Plans with Large Derived Dimension Mappings

2026R2 | Adaptive Planning | Core Planning - Modeling

High-level information

We improve the performance when you load a sheet with a plan that contains a derived dimension with a large number of mappings.

How this impacts the client

We improve the performance when you load a sheet with a plan that contains a derived dimension with a large number of mappings.

Client discussion points

Review configuration, reporting, integrations, and impacted users to determine whether the release note applies to your tenant.

Client-ready takeaway

We improve the performance when you load a sheet with a plan that contains a derived dimension with a large number of mappings.

Setup: Not specified | Audience: Plans & Budgets

Adaptive Planning

Core Planning - Modeling

Regression Testing: NO

No dedicated regression scenario is indicated in the source note.

Type	Fix
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Metric Account Formula Optimizations

2026R2 | Adaptive Planning | Core Planning - Modeling

High-level information

Workday Adaptive Planning now routes metric accounts with certain formula patterns to an optimized calculation path. The change applies to metric accounts whose formula has a discriminant that contains a dimension or dimension attribute=this.

How this impacts the client

Automatically Available If you use metric accounts with a dimension or dimension attribute=this discriminant: • Identify reports, sheets, dashboards, and data exports that reference those metric accounts. • Compare results for the two scenarios described in Changes.

Client discussion points

• Metric accounts where formulas include a discriminant that contains a dimension or dimension attribute=this now route to an optimized calculation path.

Client-ready takeaway

• Improves performance by evaluating qualifying metric account formulas on an optimized calculation path. • Helps reports, sheets, and data exports that use these metric accounts complete faster.

Setup: Automatically Available | Audience: Manage Plans & Models

Adaptive Planning

Core Planning - Modeling

Regression Testing: YES

Client should validate the change in preview before production.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Tolerance-Based and Ambiguous Transaction Matching

2026R2 | Adaptive Planning, Financial Management | Adaptive Planning and Consolidation, Close and Consolidate

High-level information

In rule-based transaction matching, you can now set up matching rules for journal lines that allow for some variation in the amounts or accounting dates. Workday also now matches ambiguous transactions with the most likely candidate when multiple viable matches exist for a journal line.

How this impacts the client

Setup Required • Access the Create Matching Rule Set task and select the Journal Line matching type. • Add Match On criteria for ledger or transaction amounts, depending on your tenant configuration. • Select Tolerance Amount or Tolerance Percentage, then enter a number in the Item Tolerance field.

Client discussion points

Tolerance-Based Matching Rules You can now create tolerance-based matching rules for journal lines for all matching methods: • One-to-one. • One-to-many. • Many-to-one. • Many-to-many.

Client-ready takeaway

This enhancement saves time and reduces the need to manually match transactions that have minor discrepancies or multiple potential matches.

Setup: Setup Required | Audience: Accounting

Adaptive Planning, Financial Management

Adaptive Planning and Consolidation, Close and Consolidate

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Copy Supporting Balances from Prior Periods on Account Reconciliations

2026R2 | Adaptive Planning, Financial Management | Adaptive Planning and Consolidation, Close and Consolidate

High-level information

When you start preparing an account reconciliation, you can now copy supporting balances from the prior period and update dates, comments, and attachments instead of manually entering them.

How this impacts the client

Automatically Available Nothing. The new functionality is available automatically. On the View Reconciliation Workspace report, when you click Start for a reconciliation that has no supporting balances in the current period, Workday now displays supporting balances that you can copy from the prior period reconciliation.

Client discussion points

On the View Reconciliation Workspace report, when you click Start for a reconciliation that has no supporting balances in the current period, Workday now displays supporting balances that you can copy from the prior per...

Client-ready takeaway

This enhancement reduces manual effort and provides greater flexibility in managing supporting balances. It also enables you to better track your supporting balances across time.

Setup: Automatically Available | Audience: Accounting

Adaptive Planning, Financial Management

Adaptive Planning and Consolidation, Close and Consolidate

Regression Testing: YES

Change touches configuration, reporting, integrations, or process behavior.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Prevent Currency Rate Overrides on Accounting Journals

2026R2 | Financial Management, Adaptive Planning | General Ledger, Adaptive Planning and Consolidation

High-level information

Workday delivers a new tenant configuration option that enables organizations to prevent end users from overriding currency conversion rates on accounting journals for selected tenanted currency rate types. This enforcement applies to manual entry on journal lines, web services, and spreadsheet imports.

How this impacts the client

Automatically Available Select the Prevent Rate Override checkbox on the currency rate types of your choosing to disable users from overriding the currency rate type. Users will continue to be able to override currency conversion rates on accounting journals.

Client discussion points

We add a new Prevent Rate Override checkbox to these tasks: • Maintain Currency Rate Types • View Currency Rate Types You can select this new checkbox to disable users from overriding the currency rate type.

Client-ready takeaway

This opt-in configuration eliminates financial risk and compliance exposures by enforcing automated system rates.

Setup: Automatically Available | Audience: Accounting

Financial Management, Adaptive Planning

General Ledger, Adaptive Planning and Consolidation

Regression Testing: YES

Client should validate the change in preview before production.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Account Reconciliation Miscellaneous Enhancements

2026R2 | Adaptive Planning, Financial Management | Adaptive Planning and Consolidation, Close and Consolidate

High-level information

You can now run automatic certification for any period you choose, and report on the ledger currency and amount on supporting balances.

How this impacts the client

Automatically Available Nothing. These changes are automatically available. Nothing. These changes don't impact existing functionality.

Client discussion points

On the Schedule Automatic Certification for Account Reconciliation task, we deliver a new Select Period option that you can select from the Period Option prompt.

Client-ready takeaway

These enhancements provide more flexibility in how you run automatic certification, and reduce the need for additional manual effort when you report on multicurrency reconciliations.

Setup: Automatically Available | Audience: Accounting

Adaptive Planning, Financial Management

Adaptive Planning and Consolidation, Close and Consolidate

Regression Testing: YES

Change touches configuration, reporting, integrations, or process behavior.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview — Production

Release Note Grant All and Grant All Except in a Single Access Rule

2026R2 | Adaptive Planning | Core Planning - Modeling, Core Planning - Administration

High-level information

With this release, you can now specify Grant and Grant All Except values for the same secured dimension in a single access rule. Workday evaluates the rule by granting access to everything in Grant, then removing anything listed in Grant All Except for that dimension.

How this impacts the client

Automatically Available No action is required. To use this enhancement, review access rules where you currently list many individual accounts or secured columns to exclude a few values. You can now replace those rules with a single rule that uses Grant for the parent value and Grant All Except for the values to exclude.

Client discussion points

You can now enter values in both Grant and Grant All Except for the same secured dimension in a single access rule on the Access Rules page and in access rules imports.

Client-ready takeaway

You can now scope access to most values in a hierarchy while excluding specific accounts, modeled sheet columns, levels, custom dimensions, or attributes—without listing every value you want to include.

Setup: Automatically Available | Audience: Manage Plans & Models

Adaptive Planning

Core Planning - Modeling, Core Planning - Administration

Regression Testing: NO

No dedicated regression scenario is indicated in the source note.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Cloud Data Connect Pipeline View and Edit

2026R2 | Adaptive Planning | Core Planning - Integration Management

High-level information

You can now view and edit existing Cloud Data Connect pipelines from Manage Integrations > Pipelines.

How this impacts the client

Automatically Available No action is required.

Client discussion points

With this release, you can now open and edit Cloud Data Connect pipelines from Manage Integrations > Pipelines. • Manage Integrations > Pipelines. Select a pipeline name or select Edit from the action menu.

Client-ready takeaway

• You can update destination and connection settings without recreating the pipeline. • You can prevent accidental loss of unsaved work with confirmation prompts.

Setup: Automatically Available | Audience: Plans & Budgets

Adaptive Planning

Core Planning - Integration Management

Regression Testing: YES

Change touches configuration, reporting, integrations, or process behavior.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview — Production

Release Note Cumulative Translation Adjustment (CTA) Account Performance

2026R2 | Adaptive Planning | Core Planning - Modeling

High-level information

Workday Adaptive Planning now calculates CTA accounts more efficiently in sheets and reports.

How this impacts the client

Automatically Available No action is required. You receive the CTA performance improvement automatically. Your existing sheets and reports continue to work as before.

Client discussion points

Adaptive Planning now evaluates CTA accounts through an optimized calculation path in sheets and reports, which can improve performance for models that use CTA accounts.

Client-ready takeaway

• Improves sheet and report performance when models include CTA accounts. • Helps planners and analysts open and refresh CTA-dependent views with less wait time during planning and reporting cycles.

Setup: Automatically Available | Audience: Manage Plans & Models

Adaptive Planning

Core Planning - Modeling

Regression Testing: YES

Change touches configuration, reporting, integrations, or process behavior.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Import Supporting Balances and Reconciling Items from External Systems to Account...

2026R2 | Adaptive Planning, Financial Management | Adaptive Planning and Consolidation, Close and Consolidate

High-level information

You can now import reconciling items and supporting balances into account reconciliations from external transaction-matching systems.

How this impacts the client

Setup Required To set up an integration system user (ISU) for account reconciliation: • Access the Create Integration System User task and create an ISU. • Create an integration system security group of type Unconstrained and add the ISU to the group.

Client discussion points

As of Workday Web Services v47.0, we enable Integration System Users (ISUs) to create, update, and retrieve reconciling items and supporting balances using these web service operations: • Get Reconciling Items • Put Rec...

Client-ready takeaway

This enhancement saves time and reduces manual effort.

Setup: Setup Required | Audience: Accounting

Adaptive Planning, Financial Management

Adaptive Planning and Consolidation, Close and Consolidate

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Alternate Calendars in Workday for Google Sheets

2026R2 | Adaptive Planning | Core Planning - Google Workspace

High-level information

With this release, you can select time periods from an alternate calendar, in addition to your default calendar, when you build reports in Workday for Google Sheets.

How this impacts the client

Automatically Available To utilize the Alternate Calendars, ensure you have the latest version of the Workday for Google Sheets add-on installed. When you don't upgrade to the latest supported version of Workday for Google Sheets, you can’t utilize the Alternate Calendars functionality.

Client discussion points

We make these updates: • We add a calendar selector above the enterprise tree when you add a Time element, enabling you to select time periods from an alternate calendar in addition to your default calendar.

Client-ready takeaway

This enables you to report on data using the calendar that's most relevant to a specific analysis, such as a fiscal or regulatory calendar that differs from your organization's default calendar, without leaving Workday...

Setup: Automatically Available | Audience: Analytics & Reporting

Adaptive Planning

Core Planning - Google Workspace

Regression Testing: YES

Client should validate the change in preview before production.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note High Volume Grids on Account Reconciliations

2026R2 | Adaptive Planning, Financial Management | Adaptive Planning and Consolidation, Close and Consolidate

High-level information

You can now view and manage larger volumes of supporting balances and reconciling items on account reconciliations.

How this impacts the client

Automatically Available Nothing. This feature is available automatically. Nothing. These changes don't impact existing functionality.

Client discussion points

On the View Reconciliation Workspace report, we update the Supporting Balance and Reconciling Items grids to now display pages of 30 rows at a time instead of displaying all rows.

Client-ready takeaway

This enhancement provides more stability when managing reconciliations with high numbers of transactions.

Setup: Automatically Available | Audience: Accounting

Adaptive Planning, Financial Management

Adaptive Planning and Consolidation, Close and Consolidate

Regression Testing: NO

No dedicated regression scenario is indicated in the source note.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Localization in Workday for Google Sheets

2026R2 | Adaptive Planning | Core Planning - Google Workspace

High-level information

With this release, we localize key user interface elements in Workday for Google Sheets, including the extension menu, report builder dimensions, filter headers, and writeback lock codes, based on your Google account language.

How this impacts the client

Automatically Available To see localized content, ensure you have the latest version of the Workday for Google Sheets add-on installed. Set your Google account language to a supported language.

Client discussion points

We now localize these elements in Workday for Google Sheets based on your Google account language: • Extension menu items, such as Clear Data and Sign Out.

Client-ready takeaway

This enables you to work more efficiently in Workday for Google Sheets in your preferred supported language, without needing to interpret untranslated menu items, dimension names, filter labels, or lock codes.

Setup: Automatically Available | Audience: Analytics & Reporting

Adaptive Planning

Core Planning - Google Workspace

Regression Testing: YES

Client should validate the change in preview before production.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Multi-Instance in Workday for Google Sheets

2026R2 | Adaptive Planning | Core Planning - Google Workspace

High-level information

With this release, you can select which Workday instance to use when you build reports in Workday for Google Sheets, and Workday locks each report to the instance it was built from.

How this impacts the client

Automatically Available To utilize the Multi-Instance, ensure you have the latest version of the Workday for Google Sheets add-on installed. The Source field appears automatically when you build a new report. When you don't upgrade to the latest supported version of Workday for Google Sheets, you can't utilize the Multi-Instance functionality.

Client discussion points

We make these updates: • We add a new Source field to the task pane when you build a new report in Workday for Google Sheets, listing the instances you have access to and pre-selecting your default instance.

Client-ready takeaway

This enables you to work with reports from multiple Workday instances in the same workbook and always know which instance a report's data comes from, while helping prevent you from viewing or mixing data across instance...

Setup: Automatically Available | Audience: Analytics & Reporting

Adaptive Planning

Core Planning - Google Workspace

Regression Testing: YES

Client should validate the change in preview before production.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Key Pair Credentials for Cloud Data Connect

2026R2 | Adaptive Planning | Core Planning - Integration Management

High-level information

With this release, we expand Cloud Data Connect authentication to support Key Pair credentials. We enable you to create, edit, and manage Key Pair credentials in Design Integrations. You can use Key Pair credentials to authenticate Snowflake cloud data sources and pipelines.

How this impacts the client

Setup Required To use Key Pair authentication with Snowflake: • In Design Integrations, create a Key Pair credential. Enter the Snowflake user or service account in Username. Paste the PEM private key in Private Key. • Confirm Credential Status shows Set. Verify Fingerprint and Key Size values.

Client discussion points

In the Credentials section of Design Integrations, you can now add Key Pair credentials. When you create or edit a Key Pair credential, you can enter: • Username for the Snowflake user or service account user name.

Client-ready takeaway

Key Pair authentication enables you to establish system-to-system connections, avoiding the use of user credentials in Snowflake integrations.

Setup: Setup Required | Audience: Plans & Budgets

Adaptive Planning

Core Planning - Integration Management

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note On-Prem Data Connector

2026R2 | Adaptive Planning | Core Planning - Integration Management

High-level information

Workday Adaptive Planning now uses On-Prem Data Connector as the product name for the on-premises integration component previously known as the integration Agent or Data Agent.

How this impacts the client

Automatically Available No action is required. Your on-premises integrations continue to run without reconfiguration. When your tenant receives this release, Design Integrations displays On-Prem Data Connector instead of Agent or Data Agent.

Client discussion points

With this release, the product name now displays as On-Prem Data Connector in these locations: • Design Integrations.

Client-ready takeaway

• Reduces confusion between the on-premises integration component and Workday AI agents, such as the Planning Agent. • Makes it easier to find and manage on-premises data connections in Adaptive Planning.

Setup: Automatically Available | Audience: Plans & Budgets

Adaptive Planning

Core Planning - Integration Management

Regression Testing: YES

Change touches configuration, reporting, integrations, or process behavior.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview — Production

Release Note Specified Approver Field on Accounting Journal and Recurring Journal Template Web Services

2026R2 | Adaptive Planning, Financial Management | Adaptive Planning and Consolidation, General Ledger

High-level information

We update the accounting journal and recurring journal template web services with an additional field, enabling you to select a specific worker to approve accounting journals and and journals generated from recurring journal templates to ensure that journals are routed correctly to valid approvers.

How this impacts the client

Setup Required This update only applies when you run web service version 47 or higher.

Client discussion points

We add a new Specified Approver field on these web services: • Import Accounting Journal • Put Recurring Journal Template Note: The new field isn't yet operational.

Client-ready takeaway

You can designate a specified approver for accounting journals and journals generated from recurring journal templates.

Setup: Setup Required | Audience: Workday API, Accounting

Adaptive Planning, Financial Management

Adaptive Planning and Consolidation, General Ledger

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Columnar View on Cube Sheets

2026R2 | Adaptive Planning | Core Planning - Sheets

High-level information

With this release, we enable you to toggle supported cube sheets between the standard cube view and a flattened columnar view. In columnar view, each level, account, dimension, and attribute displays in its own column so you can enter and review leaf-level data in a spreadsheet-like layout.

How this impacts the client

Automatically Available No setup is required to use columnar view. To change how many rows load on the first page, set Columnar View First Page Size on the Company setup page. Inform planners that they can select the new Columnar toggle on supported cube sheets to enter data in the flattened layout.

Client discussion points

Suggested regression scenario: • Open a cube sheet with multiple dimensions in standalone view. Toggle to columnar view, filter with pickers, edit a cell, save, and toggle back to cube view. • Add the same cube sheet to a dashboard or hub.

Client-ready takeaway

This improves multi-dimensional planning efficiency by letting users switch between cube view for aggregation and analysis and columnar view for faster, row-based data entry without workarounds such as modeled sheets fo...

Setup: Automatically Available | Audience: Plans & Budgets

Adaptive Planning

Core Planning - Sheets

Regression Testing: YES

Release note includes test scenarios.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview — Production

Release Note Multicompany and Multicurrency Journals from Recurring Journal Templates

2026R2 | Adaptive Planning, Financial Management | Adaptive Planning and Consolidation, General Ledger

High-level information

Workday continues to improve the journal creation process and now enables you to create recurring journal templates (RJT) that generate journals with multiple companies with different ledger currencies and multiple transaction currencies.

How this impacts the client

Automatically Available This feature is automatically available when you have the No Intercompany Payable/Receivable Lines when Journals Self Balance by Company check box selected in your tenant setup. To enable this check box: Access the Edit Tenant Setup - Financials task.

Client discussion points

We update the Put Recurring Journal Template web service and remove restrictions so you can now create recurring journal templates that contain multiple transaction currencies and multiple line companies with different...

Client-ready takeaway

This functionality reduces the need to manually create and approve separate journals with multiple transaction currencies and multiple companies with different ledger currencies.

Setup: Automatically Available | Audience: Accounting

Adaptive Planning, Financial Management

Adaptive Planning and Consolidation, General Ledger

Regression Testing: YES

Client should validate the change in preview before production.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview — Production

Release Note Grouped Filters, Hub Files, and Scenario Management for Hubs

2026R2 | Adaptive Planning | Core Planning - Dashboards, Core Planning - Modeling, Core Planning - Sheets, Core Planning - Processes and Workflow, Core Planning - Web Reporting, Adaptive Planning and Consolidation, Core Planning - Planning Hubs

High-level information

With this release, Adaptive Planning hub builders can create more connected planning experiences and help hub users keep context as they move across hub pages. You can now: • Synchronize compatible filter selections across hub pages using grouped filters. • Use a files area to store supporting documents and uploads. • Manage scenarios directly from a hub.

How this impacts the client

Setup Required To configure Grouped filters, users must be assigned the Edit Hubs permission. To use Grouped filters, users must be assigned the Access Hubs permission. Your existing hubs continue to work as they do today. Hub users can't use grouped filters, the Files area, or enhanced overview content until hub builders configure them.

Client discussion points

Hub builders can: • Create, edit, and delete grouped filters on a personal or checked-out hub so compatible filters across eligible pages share a single selection.

Client-ready takeaway

• Reduce repetitive filter changes when moving between hub pages that share the same dimensions, such as version and level.

Setup: Setup Required | Audience: Manage Plans & Models

Adaptive Planning

Core Planning - Dashboards, Core Planning - Modeling,...

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview Production

Release Note Rich Text in Hubs Overview and Dashboards Text Box Widget

2026R2 | Adaptive Planning | Core Planning - Dashboards, Core Planning - Modeling, Core Planning - Sheets, Core Planning - Processes and Workflow, Core Planning - Web Reporting, Adaptive Planning and Consolidation, Core Planning - Planning Hubs

High-level information

For Adaptive Planning Hubs and Dashboards, we now deliver a richer text widget built on the Lexical rich-text editor. Hubs and dashboard builders can: • Format content. • Link to internal assets such as sheets or reports and external URLs. • Add images that scale across devices.

How this impacts the client

Setup Required As administrators, confirm that hub builders have: • The Edit Hubs or Edit Dashboards permission to use the updated text widget. No migration action is required for existing text content. • Access to the dashboards, hub pages, reports, and sheets they intend to link from content.

Client discussion points

Hubs and dashboard builders can: • Use a new formatting toolbar when you select the text widget in edit mode. • Paste content into the text widget without breaking the hub layout.

Client-ready takeaway

Enables Hubs and dashboard builders to create clearer, more structured content. Helps planners navigate directly from overview content to dashboards, hubs pages, reports, and sheets linked in the widget.

Setup: Setup Required | Audience: Manage Plans & Models

Adaptive Planning

Core Planning - Dashboards, Core Planning - Modeling,...

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview — Production

Release Note Salesforce Connector API Version Upgrade and OAuth2 Authentication

2026R2 | Adaptive Planning | Core Planning - Integration Management

High-level information

The Adaptive Planning Salesforce connector now supports Salesforce API v66.0, which is the default version for new Salesforce data sources and provides an upgrade path from v51.0. Salesforce data source authentication now supports OAuth2.

How this impacts the client

Setup Required • Review your existing Salesforce data sources to identify their current API version and credential type. • If a data source uses a password credential, create or select an OAuth2 credential and switch the data source credential dropdown to use it.

Client discussion points

Administrators can: • Use the credential dropdown, which now replaces the Username and Password fields on the Salesforce data source configuration, to select a credential for the connection.

Client-ready takeaway

• Aligns your Salesforce integration with currently supported Salesforce API versions, reducing the risk of import failures caused by retired endpoints.

Setup: Setup Required | Audience: Plans & Budgets

Adaptive Planning

Core Planning - Integration Management

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2026-08-15
Production	2026-09-19

Preview — Production

Release Note NetSuite Data Sources for NetSuite 2025.2 Web Services

High-level information

With this release, Workday is updating NetSuite data sources to support NetSuite 2025.2 Web Services. New NetSuite data sources use the 2025.2 endpoint by default, and existing NetSuite data sources can upgrade to the 2025.2 endpoint.

How this impacts the client

Setup Required To use the NetSuite 2025.2 endpoint for an existing NetSuite data source, use the Upgrade to 2025.2 action when it is available. New NetSuite data sources use the 2025.2 endpoint by default. Existing NetSuite data sources remain on their current endpoint version until you upgrade them.

Client discussion points

Workday plans to add support for the NetSuite 2025.2 endpoint for NetSuite data sources.

Client-ready takeaway

This feature helps you: • Keep NetSuite integrations current with supported NetSuite Web Services endpoints. • Reduces the risk of interruption when NetSuite discontinues support for older WSDL versions.

Setup: Setup Required | Audience: Plans & Budgets

Adaptive Planning

Core Planning - Integration Management

Regression Testing: YES

Setup or action is marked as required.

Type	Coming Soon
Tenant	N/A
Preview	2026-08-15
Production	2026-09-19

Preview — Production

Release Note Explore Cell Drill-Through

2026R2 | Adaptive Planning | Core Planning - Integration Management

High-level information

Adaptive Planning now returns this error more quickly when you use Explore Cell on a planning sheet and then drill through: External system is not correctly configured. The following issues were found: A related report was not found.

How this impacts the client

Adaptive Planning now returns this error more quickly when you use Explore Cell on a planning sheet and then drill through: External system is not correctly configured. The following issues were found: A related report was not found.

Client discussion points

Review configuration, reporting, integrations, and impacted users to determine whether the release note applies to your tenant.

Client-ready takeaway

Adaptive Planning now returns this error more quickly when you use Explore Cell on a planning sheet and then drill through: External system is not correctly configured. The following issues were found: A related report was not found.

Setup: Not specified | Audience: Plans & Budgets

Adaptive Planning

Core Planning - Integration Management

Regression Testing: NO

No dedicated regression scenario is indicated in the source note.

Type	Fix
Tenant	Preview
Preview	2026-07-10
Production	2026-09-19

Preview Production

Release Note Workday for Google Sheets

2026R2 | Adaptive Planning | Core Planning - Sheets

High-level information

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.

How this impacts the client

Setup Required 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 the following steps.

Client discussion points

You can now: • Use a new sidebar in Google Sheets to build reports by adding accounts and other dimensions to rows, columns, and filters.

Client-ready takeaway

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...

Setup: Setup Required | Audience: Analytics & Reporting

Adaptive Planning

Core Planning - Sheets

Regression Testing: YES

Setup or action is marked as required.

Type	Feature
Tenant	Preview
Preview	2025-11-21
Production	2026-09-19

Preview — Production

Release Note Opt In to Tenant Lifecycle Management (TLM) for Adaptive Planning

2026R2 | Adaptive Planning | Core Planning - Administration

High-level information

Adaptive Planning customers will be able opt in to Workday-aligned sandbox and sandbox preview functionality. The early adoption (EA) period for this feature has ended. We're working on the tools and processes to onboard additional customers and will keep you posted on the new release schedule, eligibility, and process for opting in.

How this impacts the client

Setup Required

Client discussion points

Customers will be able to: • Opt in to enroll for Workday Style Sandbox environments (refreshed every Friday) to test on latest prod dataset.

Client-ready takeaway

Customers will be able to: • Opt in to enroll for Workday Style Sandbox environments (refreshed every Friday) to test on latest prod dataset.

Setup: Setup Required | Audience: Workday Services & Operations

Adaptive Planning

Core Planning - Administration

Regression Testing: YES

Setup or action is marked as required.

Type	Coming Soon
Tenant	N/A
Preview	2026-09-19
Production	2026-09-19

Preview Production

Questions?

- A few questions from registration:
  - Do you have to be on the uMSA to have access to these new AI features?
  - What LLM is Workday using?
  - Can you share tips for Integrating Workday AI features into 3rd party tools - AWS Quick, CoPilot, ServiceNow etc.?

HEADING TO WORKDAY RISING?

Join us at the Armanino Connection Café

Meet with our team of experts at Rising in the Armanino Connection Café. Grab breakfast, lunch, or a quick bite between sessions and get 1-on-1 time with a Workday expert.

Armanino Operates in an Alternative Practice Structure:

Armanino's accounting, consulting and technology experts combine technical know-how with firsthand industry knowledge. We've built AI into everything we do, so you have the power to innovate on your own terms. Build anything. Learn more at armanino.com.

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