What's New

Product Summary

April 2023

This content is not part of the Workday Administrator Guide and is subject to further change.

Contents

Releases

Release Notes

Learn about the latest features and releases.

2023R1 Release Notes

Adaptive Planning Instance Usage Survey

We now enable you to tell us how you use your Adaptive Planning instances and instance trees so that we can align your instances for future enhancements, streamlining enhancement implementations.

Instance Usage Survey
Release: 2023-03-11

We add a new Instance Usage Survey link in the System section of the Administration page, enabling you to tell us whether you use your instance or instance tree as either:

- Nonproduction/Sandbox, which you infrequently refresh from production and primarily use for development.
- Nonproduction/Sandbox, which you regularly refresh from production and primarily use for testing.
- Production, which you never refresh.

This enables us to align your instances and instance trees for future enhancements to refreshes and instance management.

Note: Complete this survey by 2023-05-08. If you don't respond by the due date, we assume instance usage for you.

Adaptive Planning User Experience

We continue to align the Workday Adaptive Planning interface with Workday to provide a more consistent user experience.

Reset Password Experience
Release: 2023-03-11

We provide a new look and feel adopting Workday design patterns for the reset password experience.

Welcome Page
Release: 2023-03-11

We provide a new look and feel adopting Workday design patterns for the Welcome page.

Visual Preferences Page
Release: 2023-03-11

With this update, we automatically enable new user interfaces by removing these check boxes from the Visual Preferences page in Administration:

- Dashboards Overview
- Matrix Report Viewer
- Workflow

See Change Visual Preferences.

Sheets Overview
Release: 2023-03-11

To improve the user experience, we redesign the Sheets overview page. We provide a new:

- Add New button with the options Level Assigned Sheet and Assumption Sheet. The options open the existing new sheet workflow in modeling.
- More menu in each sheet row to Rename, Edit, and Delete the sheet. The Edit option opens the existing edit sheet workflow in modeling.

The new updates only display if you have the Model includes: sheets, accounts, dimensions, and formulas permission.

See Concept: Sheets Quick Tour.

Matrix Reports
Release: 2023-03-11

To provide a more seamless user experience, we update matrix reports in Adaptive Planning by:

- Enabling you to expand or collapse all parameters in the report viewer. By default, the parameters display as expanded. The expanded or collapsed state of the parameters persists when you run or save the report.
- Providing a new look and feel for the report snapshot page.
- Providing a new report download page. From this page, you can navigate to the reports overview.
- Providing a new look and feel for the prompting parameters page for matrix reports and report books. From this page, you can now cancel out and return to the report page that you were last on.
- Refreshing the whole page in the matrix report viewer after you select Save As or change a report parameter. Refreshing the whole page instead of sections avoids stale data.

See Concept: Matrix Reports.

Accessibility on Modeling
Release: 2023-03-11

We continue to improve accessibility to help support the Web Content Accessibility Guidelines 2.1.

We continue to deliver this assistive technology support with screen readers and magnifiers:

- Keyboard shortcuts.
- Screen navigation with logical tabbing and alt text for images.

We continue to provide this accessibility functionality on high-use pages in Modeling:

- Levels and Dimensions pages.
- Accounts pages.

Accessibility on Sheets
Release: 2023-03-11

We continue to improve accessibility on sheets to help support the Web Content Accessibility Guidelines 2.1.

We continue to deliver this assistive technology support with screen readers and magnifiers:

- High-contrast color.
- Keyboard shortcuts.
- Screen navigation with logical tabbing and alt text for images.

We continue to provide this accessibility functionality support with screen readers and magnifiers on high-use features in Sheets:

- Cell notes.
- Context menus.
- Sheet grid.

Display Cube Sheet Size

With this release, we enable you to view the percent of capacity that a cube sheet uses for each version. With this information, you can proactively monitor your cube sheet size and make more informed design decisions.

Watch the video: 2m 15s

Visibility to Cube Sheet Size
Release: 2023-03-11

We provide a new View Capacity button on the Sheet Summary of cube sheets in the Modeling area. With this button, we enable you to:

- View the percent of the capacity used per version.
- Link to the troubleshooting topic in the Help Center that can help you decrease the capacity and improve the sheet performance.

We remove all sheet size warning banners that we display on the Sheet Summary of cube sheets and recommend that you use the new button instead.

See:

- View the Capacity of Cube Sheets.
- Troubleshooting: Decrease Cube Sheet Capacity.

Version Availability for List Dimensions

With this release, we save you time and effort with improved functionality for managing the version availability of list dimension values.

Watch the video: 3m 13s

Import Dimension Value Availability
Release: 2023-03-11

For fast updates to list dimensions, you can now import version availability.

- In the spreadsheet export, we now enable you to update the version availability in the version columns.
- In the import template, we now enable you to add columns for each version name and make changes to the availability.

See:

- Import Dimensions and Dimension Values.

Ignore Version Availability in Dimension Imports
Release: 2023-03-11

To improve performance, we now provide a new check box on the Import Dimension Structure dialog for Update and Append. The new check box displays after you select the file to upload, and enables you to ignore the version availability in the import spreadsheet.

View Dependencies Enhancements for Custom Dimension Values

With this release, we improve the **View Dependencies** capability for custom dimension values. In the tabs, we now provide more comprehensive information to help you locate where the model uses and references dimension values. Knowing where to find the dimension values helps you complete required tasks so that you can delete dimension values.

Watch the video: 3m 38s

New View Dependencies Tabs in the Usage Dialog

Release: 2023-03-11

To help you prepare for the deletion of dimension values, we provide new Usage tabs when you click View Dependencies from the Dimension Value Details section in Modeling.

These new tabs offer information that you must resolve before deleting dimension values:

- Standard Data: We list the account, version, and level where dimension splits on standard sheets use the dimension value.
- Modeled Data: We list the name of modeled sheets that include rows with the dimension value. We also list the version and level.
- Cube Data: We list the account code, with the cube sheet prefix where you have associated data with the dimension value on cube sheets. We also list the version, and level.
- Derived Dimensions: We list the name of the derived dimension that refers to the dimension value. We also list the version and level.
- Level Dimensions: We list level names and level codes that are tagged with the dimension value.

These new tabs provide additional information that you don't need to resolve before deleting dimension values:

- Transactions: We list accounts and levels where transactional data has been tagged with the dimension value in all accounts that support transactional data.
- Link Properties: We list the account name and code of linked accounts that use the dimension value for Apply Dimension Value or Linked Filters prompts.

See Resolve View Dependencies to Delete Dimension Values.

Updates to Existing Tabs in the Usage Dialog

Release: 2023-03-11

We update existing tabs to provide more information on how the model currently uses the dimension value.

In the **Reports** tab, we now list the username of the report builder. We also include reports that have the specific dimension value in the report builder canvas.

We now list the level code for these existing tabs:

- Shared Formulas
- Cube Entries
- Other Entries

We also change the Rules tab name to Allocation Rules.

See Resolve View Dependencies to Delete Dimension Values.

View Dependencies Enhancements for Accounts, Levels, and Attributes

To help you locate where you you use accounts, attributes, and levels in your model, we add new columns to the existing View Dependencies tabs.

Level Code Columns in the View Dependencies Tabs

Release: 2023-03-11

For accounts, levels, and attributes, we add Level Code columns to these existing tabs:

- Cube Entries.
- Other Entries.
- Shared Formulas.

New UserName Column in the Reports Tab

Release: 2023-03-11

We add a new column in the existing Reports tab called UserName. This column indicates the username of the person who created the report that uses the account, attribute, or level.

Plan Publishing Performance and User Experience Enhancements

With this release, we redesigned and improved the financial plan publishing experience. We increase performance by reducing the publishing payload size and optimizing the import process. The interface now includes more accurate error and status messages, and more publishing details.

Note: Your instance must have publishing financial plans already configured.

Publish Workforce Planning Action Removed from Publish Plans Page

Release: 2023-03-11

The original Publish Plans page allows publishing Workforce Planning Actions. The redesigned Publish Plans page disables publishing Workforce Planning Actions. You can still publish Workforce Planning Actions from the Workforce Planning roster modeled sheet.

The redesigned page continues to display new and previous publishing history details for Workforce Planning Actions.

Launch New Publish Task

Release: 2023-03-11

We replace the publish drop down menu in the Publish Plans page with the Launch New Publish Task link. Clicking the link enables you to publish by setting parameters for:

- Publish Type.
- Version.
- Plan.

Note: Parameters vary depending on your publish type.

Redesigned Publish Plans Page

Release: 2023-03-11

With this release, we:

- Shift the publish history to the left pane and populate the right pane with details when you select an item.
- Aggregate all messages across Workday Financials and Adaptive Planning in the redesigned publishing page.
- Enable filtering for publish status and type.

Status, Validation, and Progress Details for Financial Plan Publishing

Release: 2023-03-11

We enhance the Publish Plans history details when you publish financial plans to display:

- Publish parameters including Type, Version, and Plan.
- Overall publish status.

- Job steps in the publish.
- Streamlined validations and Planning contextual messages.

Financial Management Web Services for Plan Publishing
Release: 2023-03-11

With this update, we deliver these new Financial Management web services SOAP APIs in version 40.0 to support publishing financial plans from Adaptive Planning:

- Put Plan Publishing Info (secured to Set Up: Plan Publishing domain).
- Import Plan Publishing CSV File (secured to Set Up: Plan Publishing domain).
- Get Plan Publish Detail (secured to Set Up: Plan Publishing domain).
- Cancel Plan Publish (secured to Set Up: Plan Publishing domain).

Publish Financial Plans Time Span Limit

With this release, we only allow you to select plan structures for publishing that span less than 5 years. This improves publishing performance.

Note: You can use linked virtual parent and child structures that combine to more than 5 years for larger plans.

Select Financial Plan Structure
Release: 2023-04-14

We no longer display financial plan structures that span more than 5 years in the Plan prompt when you select plans to publish.

See Publish Financial Plans from Adaptive Planning.

Workforce Planning Configuration Manager

With this release, we simplify the configuration of Adaptive Planning for workforce planning customers by enabling you to automatically create and maintain planning data and metadata from one location. This reduces implementation time while improving the user experience.

Note: This feature is only available to customers who are implementing Adaptive Planning for the Workforce for the first time. You must contact your Named Support Contact to enable this feature.

Watch the video: 3m 20s

Manage Workforce Planning Configuration Task
Release: 2023-03-11

We deliver a new Manage Workforce Planning Configuration task (secured to the Set Up: Adaptive Planning domain) that you can use to quickly create in Adaptive Planning:

- A level hierarchy.
- Dimensions and dimension values.
- Attributes and attribute values.
- A plan version.
- FTE, Headcount, Cost of Workforce modeled accounts.
- A personnel modeled sheet.
- Integration data sources.
- Integration metadata and data loaders.
- An orchestration task.
- Integration tasks with metadata and data refresh schedules.
- A Workday external system.

To make changes to what you created, unregister this manager, make the changes, and reregister the manager.

Register Workday Credentials for Orchestration

Release: 2023-03-11

We now enable you to register a Workday data source credential for orchestration from Design Integrations so that you can select it during the Select Instance and Activate step of the planning configuration manager.

Modeled Sheet Builder

Release: 2023-03-11

To ensure data integrity when you create a modeled sheet using a workforce planning configuration manager, we disable in the Adaptive Planning modeled sheet builder:

- General Properties options on the Columns and Levels page.
- The ability to add Data Entry, Dimensions, and Attributes columns on the Columns and Levels page.
- The ability to delete any columns generated by the planning configuration manager.
- The ability to edit properties for any columns generated by the planning configuration manager.

You can still create display and level currency columns for modeled sheets created by the planning configuration manager.

For these modeled sheets, we display a banner on the Columns and Levels page indicating that the modeled sheet was created by the workforce planning configuration manager.

Level Admin

Release: 2023-03-11

To ensure data integrity when you create levels using a workforce planning configuration manager, we disable in the Adaptive Planning level admin their:

- Name.
- Code.
- Level attribute value name.
- Level attribute value code.

Note: Level structure and level attribute imports will fail if they alter name and code mappings created by the planning configuration manager.

Dimension Admin

Release: 2023-03-11

To ensure data integrity when you create dimensions and their values using a workforce planning configuration manager, we disable in the Adaptive Planning dimension admin their:

- Name.
- Short name.
- Code.
- Dimension attribute value name.
- Dimension attribute value code.

Note: Note: Dimension structure imports will fail if they alter name and code mappings created by the planning configuration manager.

Attribute Admin

Release: 2023-03-11

To ensure data integrity when you create attributes and their values using a workforce planning configuration manager, we disable in the Adaptive Planning attribute admin their:

- Name.
- Short Name.
- Value Code.
- Value Name.

Note: Attribute structure imports will fail if they alter name and code mappings created by the planning configuration manager.

Account Admin

Release: 2023-03-11

To ensure data integrity when you create accounts using a workforce planning configuration manager, we disable in the Adaptive Planning account admin their:

- Code.
- Account attribute value name.
- Account attribute value code.

If you rename these 3 accounts created by the planning configuration manager, you must create new accounts with the same names:

- Headcount
- Cost of Workforce
- FTE

Note: Account structure imports will fail if they alter name and code mappings created by the planning configuration manager.

Modeled Sheet Rows and Data in Sheet Interface

Release: 2023-03-11

To ensure data integrity when you create a modeled sheet using a workforce planning configuration manager, in the sheet interface we disable your ability to:

- Add data and rows.
- Delete data and rows.
- Edit data and rows.

You can still view rows and data.

User Preference Row Totals in Cube Sheets

You can now configure which visible row totals to display on your cube sheets, enabling you to only display the dimension row totals that matter to you.

Hide Row Totals Tab on Display Options

Release: 2023-03-11

We add a new Hide Row Totals tab on the Display Options menu of your cube sheets, enabling you to configure which visible row totals to display based on the selected dimensions. Row totals are visible based on which dimensions you display on your user view state, and we display those row totals based on your selections on this tab.

Note: We only support instances that don't enable Excel Interface for Planning.

See Change Cube Sheet View.

Web Reports

We continue to enhance the web reports user experience by adding capabilities around linking, drilling, and report parameters.

Add Web Reports Links on Dashboards

Release: 2023-03-11

With this release, we enable you to add links to all web report types from dashboards.

By linking web reports from dashboards, you can both analyze and forecast your plans from a single location. The reports must be shared with you for view access.

See:

- Add Text to Dashboards
- Concept: Reports Quick Tour

Live Reports in Announcements Retirement

Release: 2023-03-11

We plan to retire the ability to include live reports as announcements in a future update. We recommend that you use report links on dashboards instead.

Also, we will now display a banner on the Announcements page informing that live reports will be deprecated in an upcoming update. Users can continue to create static HTML and text files as announcements.

Select Drill-Down Options for Matrix Reports

Release: 2023-03-11

With this release, we enable matrix report builders to select the drilling options for reports. Report users can then drill down on the report details using the options that produce valid results.

See Specify Drilling Options for Reports.

Dot Icon for Notes and Contra Accounts

Release: 2023-03-11

We now display a new dot icon next to the contra account indicator when a report row includes:

- A parent contra account with note: The dot icon indicates the presence of notes in child accounts.
- A parent contra account with child contra accounts: The dot icon indicates the presence of child contra accounts.

Reports Performance

With this release, we improve the performance and scalability for large, multi-dimensional matrix reports with sparse data. Users can run matrix reports with more vertically stacked dimensions and larger possible cube intersections with faster load time. Also, we optimize the data computation for OfficeConnect reports for improved performance.

Note: This functionality is now generally available.

Unsupported Features

Release: 2023-04-14

Currently, we don't support these modeling and reports features:

- Version Offset
- Repeating reports

- Display As
- Add Splits
- Alternate calendars
- Spread lookups
- Value lookups
- Text rollups
- Weighted average rollup
- Weighted average translation
- Matrix reports that include:
  - Element attributes in the rows with the **Suppress rows if all zeros or blank** option unselected.
  - Element attributes in the columns with the **Suppress columns if all zeros or blank** option unselected.

Unsupported Accounts
Release: 2023-04-14

To benefit from performance improvement:

- All reports must include at least 1 account.
- For matrix reports with multiple segments, each segment must include at least 1 account.

Currently, we don't support reports with these account types:

- Metric accounts
- System accounts including:
  - Allocations
  - Minority interest percent
  - Eliminations
  - Cumulative translation adjustment
- Model sheet assumption account

Effective Date Support in OfficeConnect for Financial Management

With this release, report creators in OfficeConnect for Financial Management can select an effective date, enabling them to report on dimensions as they were organized in hierarchies on that date. This helps to accurately report for the date in question, or for what-if scenarios.

Watch the video: 4m 57s

Effective Date in OfficeConnect
Release: 2023-03-11

Report creators can now select an effective date for reporting on the dimension hierarchies and values in the model as of that date. An effective date can include:

- Dynamic dates that change. Example: Current date.
- Static dates that the system provides. Example: Quarter end dates for the last two years.
- Static dates that the customer specifies. Example: Future dates or past dates.
- You can select a different effective date for each workbook. You can change the effective date in a workbook and then save it. When you next reopen the workbook, the effective date:
  - Persists if it is a static date.
  - Changes if it is a dynamic date.

See Report on Dimension Hierarchies Using Effective Date.

Effective Date in the Financial Reporting Data Model

Release: 2023-03-11

Workday enhances effective dating in the financial reporting data model. Administrators can now specify custom dates that represent special dates to the org. Example: An org change that occurred on a specific date. In addition, the reporting model now includes additional options that are provided by default and cannot be changed.

See Set Up the Financial Reporting Data Model.

Multiple Hierarchy Support in OfficeConnect for Financial Management

With this release, OfficeConnect for Financial Management can now include more than one hierarchy per dimension in the financial reporting data model, enabling report creators to choose from and use any of the available hierarchies in their report. This increases flexibility in reporting by enabling users to use different hierarchies in dimensions like companies, ledger accounts, and cost centers.

Watch the video: 4m 8s

Multiple Hierarchies in OfficeConnect

Release: 2023-03-11

Report creators can now select from and use alternate hierarchies available in the reporting data model. Alternate hierarchies enable users to present different views using the same elements organized differently in each hierarchy.

Example: You recently acquired a company and they're not in the consolidation hierarchy yet. Use alternate hierarchies to report on both:

- The global hierarchy that consolidates all companies.
- The hierarchy of the acquired company that's currently separate.

See Report on Alternate Hierarchies.

Multiple Hierarchies in Financial Reporting Data Model

Release: 2023-03-11

Administrators can now select more than one top-level hierarchy per dimension in the reporting data model. We update the Set Up Financial Reporting and Analytics Data Model task with options to select alternate hierarchies to increase flexibility in reporting on dimensions like companies, ledger accounts, and cost centers.

Example: You recently acquired a company and they're not in the consolidation hierarchy yet. Set up alternate hierarchies to enable reporting on both:

- The global hierarchy that consolidates all companies.
- The hierarchy of the acquired company that's currently separate.

See Set Up the Financial Reporting Data Model.

Dashboard Snapshots

With 2023R1, we now enable you to pause snapshot schedules, making it easier to manage snapshot schedules.

Pause Snapshot Schedules

Release: 2023-03-11

We now enable the option to pause and resume your snapshot schedules. We also add a new Status column to help identify if a schedule is paused or active.

See Create Perspective Snapshots.

Scatter Chart on Dashboards

With 2023R1, we now enable you to use scatter charts in dashboards, giving you more ways to visualize your data.

Scatter Chart
Release: 2023-03-11

You can now add scatter charts to your dashboards in all Workday Adaptive Planning configurations. The Scatter chart is now in the list of available charts in edit mode.

See Create a Scatter Chart.

Sheets on Dashboards

With 2023R1, we continue to improve sheets on dashboards, enabling more flexibility with performance.

Optimize Sheets on Dashboards
Release: 2023-03-11

We improve the Optimize Sheet option for sheets on dashboards. The Optimize Sheet option enables you to use a new version of sheets on dashboards that improves load times.

For modeled sheets with Optimize Sheet enabled, you can now:

- Enter, edit, and delete values.
- Copy and paste multiple rows.
- Add rows.
- Save changes made to the sheet.

For all types of sheets with Optimize Sheet enabled, you can also:

- Make column size changes and the changes save to your sheet view.
- View cell notes in a pop-up window.

Text on Dashboards

With 2023R1, you can now add web report links to text on dashboards, helping you add links to reports without leaving dashboards.

Add Web Report Links to Dashboards
Release: 2023-03-11

You can now use the Insert Link option in text on dashboards to add links to your shared reports. There is a new Link Type field with the options:

- Report. Displays the Shared Report field to browse shared reports.
- URL. Displays the Enter a URL field.

See Add Text to Dashboards.

NetSuite Endpoint Upgrade

With this release, we support NetSuite Web Services 2022.1. This ensures continuity of NetSuite support.

Upgrade to NetSuite Web Services 2022.1
Release: 2023-03-11

We enable you to upgrade to 2022.1:

- By clicking a link in the actions pane for existing NetSuite data sources in Design Integrations.
- By accessing NetSuite Basic, without requiring interaction.

See Upgrade NetSuite Data Sources.

NetSuite 2018.1 Support Removed

Release: 2023-03-11

We remove support for NetSuite 2018.1.

Specify Integration Task Order

We enable you to specify the order that loaders run within an integration task. This improves the user experience in Design Integrations, providing visibility and control of your integration loader sequence.

Order Loaders

Release: 2023-03-11

Click Manage Loader Run Order in an integration task to enable sequencing of loaders. The task grid then enables these buttons on each row for specifying the loader order:

- Top
- Up
- Down
- Bottom

Note: You can no longer schedule subtasks once you enable this feature.

See Reorder Integration Tasks.

Loader Sequence Messages

Release: 2023-03-11

When you set a loader sequence, the progress monitor window and logs enumerate the loaders to help you troubleshoot integration task runs.

See Reorder Integration Tasks.

Delta Replace Mode for Standard Data Import API

We introduce delta replace mode for the importStandardData API, making data imports more performant. You can load only the changes to existing data in Adaptive Planning by specifying a scope.

You must use API v36.

Scope for Replace Mode

Release: 2023-03-11

We introduce a scope element for replace mode that must contain:

- 1 time element.
- 1 accounts element.
- 1 levels element.

The scope limits what data is replaced.

See importStandardData.

Import Standard Data Replace Mode API Erase Permission

Release: 2023-03-11

Users making importStandardData requests require Erase Data permissions for API v36 to support replace mode.

See importStandardData.

JSON Formatted REST API Endpoints

We deliver new JSON formatted REST API endpoints, enabling you to create applications and integrations based on Adaptive Planning modeled sheets, currencies, exchange rate types, time, and versions.

Modeled Sheet Defintion API
Release: 2023-03-11

If you want to define a modeled sheet in Adaptive Planning, you can now use the modeled sheet JSON formatted REST API endpoint. This API supports:

- PATCH
- DELETE

See Modeled Sheet Definition.

Time API
Release: 2023-03-11

If you want to append, reload, or update your time structure you can now use the time JSON formatted REST API endpoint. This API supports:

- POST

See Time.

Versions API
Release: 2023-03-11

If you want to create, update, or delete versions you can now use the versions JSON formatted REST API endpoint. This API supports:

- GET
- PATCH
- POST
- DELETE

See Versions.

Currency API
Release: 2023-03-11

If you want to create, update, or delete currencies you can now use the currency JSON formatted REST API endpoint. This API supports:

- POST
- DELETE

See Currency.

Exchange Rate Type API
Release: 2023-03-11

If you want to create, update, or delete versions you can now use the versions JSON formatted REST API endpoint. This API supports:

- GET
- POST
- DELETE

See Exchange Rate Type.

Cube Sheet Data Replace Mode

With this release, we improve Replace Import Mode performance for cube sheet data in Planning Data Loaders, increasing the maximum payload size.

Larger Cube Data Payloads
Release: 2023-03-11

We no longer limit the Replace Import Mode payload size to 145 MB in Planning Data Loaders.

See Create Planning Data Loaders.

Adaptive Planning Translations

We expand our local language support by adding French (Canada) and Italian to Adaptive Planning.

Adaptive Planning Translations
Release: 2023-03-11

We now provide translations for Adaptive Planning users in:

- French (Canada)
- Italian

Note: We plan to support dashboards and sheets translations for these languages in a future update.

See Reference: Technology Requirements.

Prevent Locked Time Period Import to Modeled Sheets

With this release, we prevent Excel template imports to modeled sheets when the templates contain locked time periods. This ensures data integrity.

Error Message for Locked Time Periods
Release: 2023-04-14

Excel template imports to modeled sheets now fail with an error when their headers contain locked time periods. Before this release, an error only displayed if locked time period columns contained data.

Adaptive Planning - Miscellaneous Enhancements

Support CSV Format for Dimension Imports
Release: 2023-03-11

To support large data sets, we now enable you to import custom dimensions and values in CSV file format.

OfficeConnect Expand Capability
Release: 2023-03-11

You can now cancel the Expand process for parent elements while it's in progress. This enables you to cancel the process if you:

- Started the process accidentally.
- Want to run the process at a more convenient time.

See Steps: Explore Reports Using Ad Hoc Analysis.

Currency Conversion Enhancement
Release: 2023-03-11

When cells in the Currency Exchange Rates sheet in Modeling are blank, the currency conversions throughout the model now return zero for the corresponding time periods.

Rollup Values in Reports with Level Attribute Filters
Release: 2023-03-11

For accounts with Weighted by Average time rollups, we now filter report values by the level attributes when the level has an attribute.

2022R2 Release Notes

2022R2 Service Pack Releases

Release: 2022-11-18

- Cancel Show Details
- Export Configurable Model Data API:
    - API Version 35
    - Request Raw Data In exportConfigurableModelData
    - Escape Double Quotes in String Values
    - Status Messages for Streaming exportConfigurableModelData
    - Prefix Removed from parentId in Data Output

Release: 2022-11-11

- Reset User Sync Mapping Between Workday and Adaptive Planning

Release: 2022-10-14

- Select Cells for Simple Calculations
- Schedule Publish Plans on page 32

Adaptive Planning User Experience

We continue to align the Workday Adaptive Planning interface with Workday to provide a more consistent user experience.

Adaptive Planning Banner
Release: 2022-09-10

To improve the user experience, we update the Workday Adaptive Planning banner on all pages by:

- Adding a new header navigation icon.
- Displaying the full breadcrumb names, instead of truncating them.
- Enabling all users to access visual preferences and add a customer logo. Customer logos display next to the navigation icon.

See: Concept: Navigation Quick Tour.

Adaptive Planning Footer
Release: 2022-09-10

To improve the user experience, we remove the Workday Adaptive Planning footer on all pages, except for sheets. On sheets, we update the current footer to display currency information and access to keyboard shortcut information.

See Concept: Sheets Quick Tour.

Reload Replaces the Reload Entire Dimensions option
Release: 2022-09-10

To improve clarity for custom dimension imports, we rename the Reload Entire Dimension(s) import option to Reload.

See: Import Dimensions and Dimension Values.

Accessibility on Sheets
Release: 2022-09-10

We improve accessibility on sheets to help support the Web Content Accessibility Guidelines 2.1.

We provide this assistive technology support with screen readers and magnifiers:

- High-contrast color.
- Keyboard shortcuts.
- Screen navigation with logical tabbing and alt text for images.

For all sheet types, we provide assistive technology support with screen readers and magnifiers in new drop-down menu trees on:

- Cell notes.
- Sheet notes.
- The Filter Rows tab on the Display Options.
- The toolbar at the top of your sheet.

For all sheet types, we also provide assistive technology support with screen readers and magnifiers on new drop-down menu trees when you:

- Apply a breakback method.
- Change dimensions.
- Copy downward or forward.
- Open and drill down on sparkline graphs.
- Right-click on a cell, row header, or column header.

Note: You can disable the new drop-down menu trees by unselecting the Apply New Drop-Down Lists on Sheets check box on the Visual Preferences page in administration.

See Reference: Accessibility in Adaptive Planning.

Accessibility on Modeling and Administration
Release: 2022-09-10

We improve accessibility to help support the Web Content Accessibility Guidelines 2.1.

We deliver this assistive technology support with screen readers and magnifiers:

- Keyboard shortcuts.
- Screen navigation with logical tabbing and alt text for images.

We provide this accessibility functionality on high-use pages in Modeling:

- Currencies.
- Dimensions.
- Formula Validation.
- Modeling Overview.
- Level Assigned Sheets Overview.
- User Assigned Sheets Overview.

- Version Admin Page, except for the version list navigation tree.
- View Dependencies window, accessed from the General Ledger Accounts and Levels page.

We also provide this accessibility functionality on high-use pages in Administration:

- Administration Overview
- Profile and Preferences

Accessibility on Dashboards
Release: 2022-09-10

We improve accessibility on dashboards to help support the Web Content Accessibility Guidelines 2.1.

In dashboards edit mode, we provide assistive technology support with screen readers and magnifiers on all:

- Charts.
- Menus and drop-downs.
- Tabs and panels.

We also now add:

- A new actions menu for Text on dashboards that includes Copy and Delete options.
- Move Up and Move Down options in the conditional formatting action menus.
- Rename, Move Left, and Move Right options in the Dashboard actions menu.

New Chart Editing Icons on Dashboards
Release: 2022-09-10

We display these new icons when you add and edit charts on dashboards:

- Accounts
- Appearance Settings
- Charts
- Collapse
- Data Settings
- Expand
- Time Settings

New Version Button on Sheets with Sales Planning
Release: 2022-09-10

If you purchased and enabled Sales Planning, we now display a New Version button in the Versions drop-down menu on sheets.

Search Content in Matrix Reports
Release: 2022-09-10

For faster navigation and access to relevant content, we now enable you to search matrix report content including:

- Account names.
- Dimensions.
- Values.
- Notes.

You can only search for data that's visible on the report. We don't enable you to search for content in footnotes or content that requires drilling into the report.

The search only supports values where the sequence matches exactly. Example: To search for 16,767, the user must type it in with the comma delimiter.

Note: If you opted out of the new matrix report interface, we recommend that you start using it. Workday plans to remove the ability to opt out of the new matrix report interface in Workday 2023 Release 1.

Alternate Calendars

With this release, you can now use alternate calendars, enabling you to provide rollup structures for times that differ from your primary calendar.

Watch the video: 7m 58s

Import Alternate Calendars

Release: 2022-09-10

We now enable you to import up to 3 alternate calendars in the Time area of Modeling. You can now use the TimeStructure spreadsheet to:

- Add columns for the alternate calendars that map to the leaf strata from the default calendar.
- Add rows below your default calendar for each alternate calendar.
- Choose at least 1 common time strata to share with the default calendar. At minimum, the alternate calendars must share the smallest strata with the default calendar.
- Choose a fork strata for each alternate calendar. The last strata shared with default calendar is the fork strata.

We also provide a new Calendar prompt in the Time area of Modeling, which is separate from the Time Period prompt. The new Calendar prompt enables you to select different calendars so that you can review the alternate time structures and the Strata Rollup section.

See:

- Setup Considerations: Alternate Calendars.
- Add Alternate Calendars.
- Concept: Adaptive Planning Time and Calendars .
- FAQ: Calendars.

Change Calendar Names

Release: 2022-09-10

We provide a new Rename Calendar button in the Time area of Modeling, enabling you to change the names of your imported calendars. We also update the Delete prompt so that you can delete imported calendars.

Improved Visuals in Strata Rollup

Release: 2022-09-10

For added clarity, we now automatically update the Strata Rollup section when you select a calendar in the Calendar prompt in the Time area of Modeling.

We also remove the color indicators and instead display new icons and text as visual indicators, helping you better identify the Default and Fork strata of the calendar you select.

View Alternate Calendars on Reports

Release: 2022-09-10

We now enable you to use alternate calendars to report using time granularities that don't exist in the default calendar structure. For both OfficeConnect and matrix web reports, we display the default and alternate calendars in the Elements tab in Time.

Report builders can apply different time elements from alternate and default calendars to your reports. Report users can view the data rolled up differently from the default calendar.

See:

- Display Alternate Calendars in Matrix Reports.
- Display Alternate Calendars in OfficeConnect Reports.

View Rollups of Alternate Calendars on Dashboard
Release: 2022-09-10

We now support alternate calendars in dashboards. You can select between the default and alternate time calendars for chart time settings and time filters. We also now support alternate calendars and time rollups on dashboards.

Alternate Calendar Support for APIs
Release: 2022-09-10

To support alternate calendars, we:

- Deliver a new exportCalendar API that you can use to export default and alternate calendar information, and calendarIds.
- Update the exportTime API to enable you to export your time configuration by calendarId. We export the default calendar if you don't specify a calendarId.

Note: To use this functionality, you must use v33 or higher in the API requests.

See:

- exportTime.
- exportCalendar.

Alternate Calendar Support for Integrations
Release: 2022-09-10

We now enable alternate calendars in Adaptive Planning Integrations. You can select an aggregation stratum from any of your calendars within the Planning Data Source for:

- Cube sheet sources.
- Custom sources.

See Steps: Set Up Planning Data Sources.

View Alternate Calendars on Sheets
Release: 2022-09-10

Workday now supports alternate calendars on sheets. We add a new Calendar prompt in the display options, enabling you to select up to 3 alternate calendars to display.

To maintain data integrity when you view your sheet using alternate calendars, we prevent you from:

- Adding a row.
- Copying a cell value and pasting.
- Copying a row and pasting.
- Drilling into transactions.
- Using Cell Explorer.

You can still save your alternate time selection as your user view state.

Note: We don't support alternate calendars with Excel Interface for Planning.

See:

- Change Cube Sheet View.
- Change Modeled Sheet View.
- Change Standard Sheet View.
- Reference: Sheet Toolbar.

Contra Accounts

With 2022R2, we now enable you to use contra accounts in Adaptive Planning, helping you better align your account hierarchy with source systems.

Watch the video: 4m 36s

Contra Accounts for Modeling

Release: 2022-09-10

With this update, you can now change the Balance Type account details on a general ledger account. When you change the balance type of an account to be different than the root account it rolls up to, the account becomes a contra account. Using contra accounts reduces rollup values while reducing the manual effort needed to enter negative numbers.

We also deliver these new columns when you export spreadsheets for your accounts:

- Balance Type, which you can use to change the account type to credit or debit.
- Contra Account, which indicates contra accounts in your account structure.

We also add the new Balance Type column to the template you can use for importing accounts.

See Concept: Balance Types and Contra Accounts.

Contra Accounts for Standard and Cube Sheets

Release: 2022-09-10

For clarity, we now display an icon next to contra accounts and contra account rollups on:

- Sheet rows on standard and cube sheets.
- Sheet columns on cube sheets.
- The Explore Cell for accounts and contributing accounts on standard and cube sheets.

When you have a contra account on a sheet, you can also view these items in the printable view:

- Contra Account column on standard and cube sheets.
- Contra Account row on cube sheets.

On the printable view of a sheet, we also add a new Contra row on the Information about this Sheet tab when you:

- View by level or select an account on standard and cube sheets.
- Pin an account on cube sheets.

See Reference: Colors and Notations in Sheets.

Support for Contra Accounts in APIs

Release: 2022-09-10

We now support contra accounts in updateAccounts and createAccount APIs to:

- Set the balance type for an account.
- View if an account is a contra account.

See:

- updateAccounts.
- createAccount.

Support for Contra Accounts in Adaptive Planning Integration
Release: 2022-09-10

With this update, you can now update the balance type for general ledger accounts using the Account loader in Adaptive Planning integrations.

See Create Planning Account Loaders.

Ledger Account Normal Credit or Debit Balance Report Field
Release: 2022-09-10

We deliver a new Ledger Account Normal Credit or Debit Balance report field on the Plan Dimension business object (secured to the Public Reporting Items domain) that you can use in condition rules and custom reports to view whether a ledger account has a normal credit or debit balance.

Support for Contra Accounts in Dashboards
Release: 2022-09-10

We update dashboard charts by now indicating when an account is a contra account. When you include a contra account in a waterfall chart, we also now invert the breakdown to ensure that the sum of the waterfall steps equals the comparison value.

Contra Accounts for EIP
Release: 2022-09-10

To improve the user experience and support contra accounts, we update sheets by now indicating when an account is a contra account.

Contra Accounts for Matrix Reports
Release: 2022-09-10

In the matrix report viewer, we now indicate when an account is a contra account. Workday also now bases the Reverse Sign property in Difference calculation elements on the balance type, not root account.

Contra Accounts for OfficeConnect
Release: 2022-09-10

When you use contra accounts in OfficeConnect, we now enable you to indicate the accounts in the Microsoft Excel report. You can apply a new Account Contra Indicator label on your report to view the indicator, and we also display the indicator in the Review tab for cell, row, column, workbook, and worksheet nodes.

See Reference: Report Label Types and Values.

Update and Append Attributes

With 2022R2, we enable you to add new account, level, and custom dimension attributes and attribute values as well as update attributes and attribute values with 1 import, saving you time and effort.

Watch the video: 2m 52s

Update and Append Attribute Structure

Release: 2022-09-10

We remove the Append option when you import attribute structures in the Modeling area for:

- Account Attributes
- Dimension Attributes
- Level Attributes

Instead, we deliver a new Update and Append option. This enables you to add new attributes and attribute values and update existing settings with 1 import.

See Import Attributes and Attribute Values.

Reload Replaces the Reload Entire Structure Option

Release: 2022-09-10

To improve clarity for attribute imports, we rename the Reload Entire Structure import option to Reload.

See Import Attributes and Attribute Values.

Improved Cube Account Settings and Imports

With 2022R2, we improve cube account settings and spreadsheet import capabilities.

Actuals By and Plan By Setting for Cube Accounts

Release: 2022-09-10

We now enable you to select options for the Actuals By and Plan By settings on cube sheet admin pages for these cumulative accounts:

- Cube-entered custom.
- Cube-entered general ledger.
- Cube calculated.

See Reference: Settings for Cube-Entered Accounts.

Import More Settings for Cube-Entered Accounts

Release: 2022-09-10

For a more consistent experience, you can now import these settings for cube-entered general ledger and custom accounts using the cube sheet Accounts spreadsheet:

- Add Link Accounts
- Apply Dimension Value
- Change Sign +/-
- Decimal Places
- Default Formula
- Exchange Rate
- Link Filter

Replace Mode for Cube Data Import in Planning Data Loaders

With this release, we introduce replace mode for cube data import within planning data loaders. This improves import performance and enables imports to cube accounts hidden from the user.

Replace Mode Import Settings

Release: 2022-09-10

We deliver a new Enable Replace Mode when you select a cube sheet in the Data Source Settings. This enables you to load data into:

- All of the cube accounts on the cube sheet you select.
- Specific cube accounts based on an accounts parameter you set up.

Note: If you enable replace mode, we hide the Erase Settings tab.

See Create Planning Data Loaders.

Sheets on Dashboards

With 2022R2, we continue to improve sheets on dashboards, enabling more flexibility with performance and options to view sheets.

Optimize Sheets on Dashboards
Release: 2022-09-10

We deliver a new Optimize Sheet option in Data Settings when you edit or create a sheet on dashboards. This enables you to use a new version of sheets on dashboards that improves load times.

When you enable the new option, you can:

- Only view data on the sheet. To add or edit data, you can maximize the sheet.
- Search and filter sheet data. All other toolbar options are only available in maximize view.
- Select dimension pickers on cube sheets. We grey out dimension pickers that match perspective context filters.

When you use the new option, we also:

- Refresh all sheets when you change perspective filters and automatically save your changes.
- Persist views between the default and maximize view.

See Reference: Differences in Sheets on Dashboards When Optimize Sheet Is Enabled.

Optimize Sheets on Dashboards
Release: 2022-09-10

You can now enable the Optimize Sheets on Dashboards feature using a new Optimize Sheets toggle for Dashboards check box in Visual Preferences.

See Reference: Differences in Sheets on Dashboards When Optimize Sheet Is Enabled.

Select Cells for Simple Calculations
Release: 2022-09-10

We now provide simple calculations when you select more than 1 cell to match the experience in standalone sheets. You can display the calculations for:

- Average
- Count
- Count Nums
- Max
- Min
- Sum

Select Cells for Simple Calculations
Release: 2022-10-14

We now provide simple calculations when you select more than 1 cell in sheets on dashboards when **Optimize Sheet** is enabled. You can display the calculations for:

- Average
- Count
- Count Nums
- Max
- Min
- Sum

Copy Charts and Dashboards

With this release, you can now copy charts and dashboards and paste to any dashboard or perspective, making it easier to build and create new dashboards.

Copy and Paste Charts on Dashboards

Release: 2022-09-10

In the More menu on charts, we rename the Duplicate chart option in edit mode to Copy, clarifying that you can now copy and paste charts to any dashboard or perspective. We include all of your configurations when you copy and paste a chart.

After you click the Copy chart option, we display a confirmation message when the chart is ready to paste on any dashboard or perspective. To paste the chart, you can right-click in the dashboard area or use the More menu of the dashboard tab.

Note: You can only copy 1 item at a time. If you delete the copied chart, you can no longer paste it.

See:

- Example: Create KPIs for Variance Between Planned Product Revenue and Actuals.
- Example: Create Multiseries Column Charts for Product and Service Revenue.

Copy Dashboards

Release: 2022-09-10

In the More menu on the dashboard tab, we rename the Duplicate dashboard option in edit mode to Copy, clarifying that you can now copy and paste dashboards to any perspective.

After you copy a dashboard, we display a confirmation message when the dashboard is ready to paste on any perspective.

We also add a new Add a Dashboard icon with these options:

- New Dashboard
- Paste Dashboard

To paste a dashboard, you can use the new Paste Dashboard option while in edit mode.

Note: You can only copy 1 item at a time. If you delete the copied dashboard, you can no longer paste it.

See: Copy Dashboards.

Bulk Add Rows on Cube Sheets

We now enable you to add rows in bulk onto cube sheets and sheet dials on dashboards. You can multiselect the innermost values of your nested row structure when you add rows. This saves you time when entering cube sheet data and provides more support for multidimensional planning.

Multiselect on Add Row Dialog for New Rows

Release: 2022-09-10

When you add a row on your cube sheet, we now enable you to select up to 6 dimensions and create a row for each of the dimensions. You can only multiselect for the innermost values on your nested dimension structure.

See Add Rows in Cube Sheets.

Streaming Data for the Planning Data Source

Note: We revert this functionality from Production tenants on 09-16-2022. We plan to redeliver it to Production in a future update.

With this release, we enable data streaming from the Planning Data Source in Adaptive Planning Integrations, improving export performance.

Planning Data Source
Released: 2022-09-10

The Planning Data Source now enables you to stream data. To stream data, you must use API v33 or higher.

See Steps: Set Up Planning Data Sources.

Export Configurable Model Data API

With this release, we continue to improve the exportConfigurableModelData API. You can now specify the columns you want to export, increasing performance and efficiency. We also enable you to set the decimal precision of the data.

Columns Filters in exportConfigurableModelData
Release: 2022-09-10

With this update, you can specify which modeled sheet columns you retrieve by including those columns in the exportConfigurableModelData filters element.

If you don't specify columns, all of the modeled sheet columns return in the response.

Note: To use this functionality, you must update the API to v33 or above. This also requires you to set isGetAllRows to true for the modeled sheet element.

See: exportConfigurableModelData.

API Version 35
Release: 2022-11-18

We now release API version 35.

Adaptive Planning REST API

Request Raw Data in exportConfigurableModelData
Release: 2022-11-18

You can now include useActualData=true in the modeled sheet element when you stream data, enabling you to ignore the account decimal precision. We export calculated accounts at 9-decimal precision.

Note: To use this functionality, you must use API v35 and not include useAccountPrecision in the request, or set it to false.

See: exportConfigurableModelData.

Escape Double Quotes in String Values
Release: 2022-11-18

We now automatically escape double quotes in string fields for dimension values and text fields to make exports easier to process.

Note: You must use API v35 and set isGetAllRows to true.

See: exportConfigurableModelData.

Status Messages for Streaming exportConfigurableModelData
Release: 2022-11-18

We now include this information in the response when you stream data from exportConfigurableModelData:

- A status tag with a Boolean success attribute.
- A total row count for the data tag.
- A row count sent in the status tag.

Note: You must use API v35 and set isGetAllRows to true.

See: exportConfigurableModelData.

Prefix Removed from parentId in Data Output

Release: 2022-11-18

We no longer include the s prefix for parentId data output with API v35 when useNumericIds=true.

See: exportConfigurableModelData.

Account Data Precision for exportConfigurableModelData

Release: 2022-09-10

We add a new useAccountPrecision attribute in the modeled sheet element on the exportConfigurableModelData API. When you set the new attribute true, we export data for accounts at the account decimal precision. When you set it to false or if you don't include the attribute, we export data at nine-decimal precision.

Note: To use this functionality, you must update the API to v33 or above. This also requires you to set isGetAllRows to true for the modeled sheet element.

See: exportConfigurableModelData.

Security APIs for Adaptive Planning

We now enable all customers to use security APIs. You can use the APIs to set up custom integrations, saving you time and manual effort.

Note: You must contact your Service Executive or Named Support Contact to enable this feature. We only recommend that you use this feature if you have over 100 planning users.

Permission Set REST API

Release: 2022-09-10

We deliver a new Permission Set REST API endpoint. When you set up instance assignments, you can use the new endpoint to quickly assign Adaptive Planning permission sets to users.

See Permission Sets.

Multiple Instance User Access REST API

Release: 2022-09-10

We deliver a new Multi-Instance User Access REST API endpoint. When you link multiple Adaptive Planning instances, you can use the new endpoint to assign a user to multiple instances and designate the default instance.

See Instances.

importGroups API

Release: 2022-09-10

We deliver a new importGroups API that you can use to import Workday security groups and their associated users into Adaptive Planning. You can also use the new API to import user groups from external sources.

This enables you to use external user groups in planning security contexts, such as in processes, access rules, and version access.

See importGroups.

View External User Groups

Release: 2022-09-10

For convenience, you can now view external user groups, such as Workday security groups, in the Global User Groups section on the Administration page.

Note: You can't edit external user groups on the tab. We recommend that you use the new importGroups API to update external user groups instead.

See Create User Groups.

Schedule Publish Plans

You can now schedule when to publish financial plans from Adaptive Planning to Workday Financials. This automates the recurring ad-hoc process by enabling planners to publish during off-peak hours.

Create Publish Plan Tasks in Design Integrations

Release: 2022-09-10

We deliver a new Publish Plan integration task type that you can use to schedule publishing a plan to Workday Financials. You can configure the integration task to run:

- Hourly
- Daily
- Weekly, or
- Monthly

To schedule, you must have access to the Integration Operator and Data Designer permissions.

When you schedule, you receive a notification indicating scheduling success or failure. The publish history page indicates the publish status.

See Schedule Publish Plans.

Create Publish Plan Tasks

Release: 2022-10-14

You no longer need to submit an Account Provisioning Ticket to request the Schedule Publishing Financial Plans feature.

To use this feature, you must either:

- Add the Financial Plan Type Segment and the Integration System Security Group (ISSG) to this segment-based security group: *Financial, Positions, and Award Plan Type Segment*.
- Add the Adaptive_Integration_Sys_Security_Group to the security policy of the *Plan Event* and the *Headcount Plan Event* business processes.

Then, you must add the:

- Integration System User (ISU) security group to the *Set Up: Plan Publishing* domain, and *Adaptive_Integration_System_User* to the *Adaptive Plan Publisher* security group.

Effective Date in Workday Data Sources from Workday Financials

We enable Report Effective Date/Time in Workday Data Sources from Workday Financials, improving the performance of data loads from Workday Financials into Adaptive Planning.

Filter by Effective Date

Release: 2022-09-10

When you edit a report for Workday Data Sources in Adaptive Planning Integration, you can select the report Effective Date as a parameter to filter the data and reduce load time.

See: Select Workday Reports in Workday Data Sources for Adaptive Planning.

Set Up NetSuite Basic

To set up NetSuite Basic, you now only need to enter your user access token ID and secret.

Note: This functionality only applies to new customers who set up NetSuite Basic. Existing customers must continue to use the consumer key and secret in addition to the user token ID and secret.

NetSuite Shared Consumer Key and Secret

Release: 2022-09-10

We update the NetSuite Setup page authentication section in Adaptive Planning to now only require:

- Token ID.
- Token secret.

Note: Existing customers must continue to use the consumer key and secret in addition to the user token ID and secret.

See Steps: Set Up NetSuite Basic Integration.

Adaptive Planning Permissions

We deliver new permissions to provide you with greater flexibility and control over user access.

Download Data to Excel from Sheets or Reports

Release: 2022-09-10

We deliver 2 new permissions that enable users to download:

- Report data to Excel.
- Sheets data to Excel

This enables you to secure access at a more granular level.

Note: We only display the Download button on sheets when the user has access to download data to Excel from sheets.

See Reference: Available Permissions.

Create Personal Reports

Release: 2022-09-10

We add a new Create Personal Reports permission that enables users to both create and view personal reports. When you disable the new permission, users can only view shared reports.

See Reference: Available Permissions.

View and Edit Permissions for Dashboards

Release: 2022-09-10

We update the Access Dashboards permission so that you can configure access at a more granular level. You can now use the permission to enable users to only view dashboards.

We also deliver 3 new dashboard permissions that enable users to:

- Create and Schedule Snapshots.
- Edit Dashboards.
- View Snapshots.

Note: We don't automatically update access permissions for users that already use dashboards.

See Reference: Available Permissions.

Adaptive Planning Performance and Scalability

We now deliver performance and scalability improvements that enable you to model your business without compromising ease of use.

Assigned To Prompts on Process Overview Page

Release: 2022-09-10

We update the Assigned To prompt on the Processes Overview page to now display a compacted list, instead of a list of tiles, at the top of the page and when you:

- Create a new task.
- Reassign an existing task to someone else.

We also remove profile avatars from the Assigned To prompt and process tracker overview cards.

Note: You no longer need to contact your Named Support Contact to enable this feature.

OfficeConnect Ad Hoc Analysis

With this release, we continue to improve the OfficeConnect ad hoc analysis functionality for Adaptive Planning and Financials. We now enable users to exclude rows with no data, providing more focused dimensional analysis.

Exclude Rows with No Data

Release: 2022-09-10

Watch the video: 2m 8s

We now provide this new option that you can use to filter out blank rows from expansions: **Exclude rows with no data**. This enables users to focus on the data that they care about and also makes large expansions possible for larger models.

If you expand any new parent elements, OfficeConnect automatically selects the new option in the Expand dialog. You can unselect the option to display rows with no data. When you save a workbook, we persist the selection status of the new option for all expansions.

See Steps: Explore Reports Using Ad Hoc Analysis.

User Defaults for New Expansions

Release: 2022-09-10

You can now configure these as defaults for new elements that you expand from your user settings:

- Expand row above or below.
- Expand columns left or right.
- Exclude uncategorized elements when expanding.
- Exclude eliminations elements when expanding (available only for Financials data source).

Also, we enable you to change those settings later without having to collapse and re-expand, saving you time.

See Reference: User Settings Fields.

Expand Options
Release: 2022-09-10

We now provide this new user setting: **Always prompt for expand options**. When you enable the new user setting, we always display the Expand dialog with its settings if you expand a single parent element.

See: Reference: User Settings Fields.

Modify Existing Expansions
Release: 2022-09-10

We now add a new **Modify Expansion** option that enables you to update existing expansions without recreating them. We add the new option in the:

- Expand group of options in the OfficeConnect tab.
- Expand options in the OfficeConnect context menu.

When you click **Expand** again for an existing expansion, it persists the settings from when you last modified the expansion.

Apply Row or Column Currency to Descendants
Release: 2022-09-10

We now enable you to apply the row or column currency to the descendant rows or columns when you expand. This enables you to report with rollups that add up using the same currency.

We only enable you to use the **Apply the Row/Column Currency to Descendants** option in the Expand dialog when:

- The workbook uses Level or Corporate currency.
- You apply a Level or Company element on the row or column.
- You don't select this option: **Exclude rows with no data**.

See Steps: Explore Reports Using Ad Hoc Analysis.

Expand Multiple Parents Based on Element Type
Release: 2022-09-10

We now provide a cartesian of expanded element types, rather than of entities. When you expand a row with multiple parents, this ensures more concise results and provides a more intuitive experience when you view rollups.

Example: You expand a row with an Assets parent and a Liabilities parent. Both parents have the element type of Accounts. The resulting expansion now produces a flat list of the children under Assets and the children under Liabilities. We no longer display a cross-entity list of each Assets child and each Liabilities child.

Note: We automatically update your existing expansions that contain multiple parents to reflect the new behavior.

See Example: Expand Report Elements for Ad Hoc Analysis.

Journal Line Details in OfficeConnect for Financial Management

We enhance OfficeConnect for Financial Management by improving how you report on journal lines. You can now drill down into journal line details and drill into Workday to view related journals and transactions.

Show Details for Report Cells

Release: 2022-09-10

Watch the video: 3m 27s

We now enable you to use the Show Details option for a report cell to display the contributing journal lines in a separate Excel worksheet. You can use the details on the worksheet to:

- Understand how data adds up for the cell.
- Confirm the validity of the data.

See Display Journal Line Details for Report Cells.

Dimension Type Name Change

Release: 2022-09-10

We now rename the Uncategorized node for specific dimension types to (Uncategorized/Blanks). This clarifies that the nodes include intersections where the given dimension has no data.

Example: Cost Center (Uncategorized/Blanks) includes all journal lines where the cost center has no data or value.

Cancel Show Details

Release: 2022-11-18

You can now cancel the Show Details process while it's in progress. This enables you to cancel the process if you:

- Started the process accidentally.
- Want to run the process at a more convenient time.

We also enhance the overall performance of OfficeConnect. This enables both Adaptive Planning and Financial Management customers to refresh your reports faster.

Level, Dimension, and Attribute Codes for Display Names

We now automatically enable the ability to import data without Code and Name columns for dimension values, attributes values, and levels. This improves the user experience by removing the need to rename text fields in modeled sheets containing the reserved keywords of name and code in labels. It also simplifies importing for languages other than English.

Single Column Data Import in Adaptive Planning APIs

Release: 2022-09-10

We now support attribute and dimension tagging in API v34 and newer with a single property for value.

For API v34 and newer, we no longer support valueName and valueCode. You can use these instead:

- updateAccounts
- updateDimensions
- updateLevels
- exportAccounts
- exportDimensions
- exportLevels

Note: For API v34 and newer, we no longer support valueName and valueCode.

See:

- updateAccounts.
- updateDimension.

- updateLevels.
- exportAccounts.
- exportDimensions.
- exportLevels.

Chinese (Simplified) Language Support

We expand our language support by adding Chinese (Simplified) to Adaptive Planning.

Note: For details, see the Language Translations feature in the System functional area on the What's New in Workday Report.

Simplified Chinese Language Support
Release: 2022-09-10

We now support displaying all text in Chinese (Simplified) throughout Adaptive Planning.

Adaptive Planning - Miscellaneous Enhancements

User Experience for Managing User Profiles
Release: 2022-09-10

We improve how you manage user profiles in administration. On the Edit User page, when you select the Use Username as Email option, we now populate the username in the Email field and no longer enable you to edit it. To add an alternate email, you can select the second option that's next to the Email field.

When you add users using either the user interface or the createUser API, we automatically select the second option that's next to the Email field. You can then enter an alternate email in the field.

See Steps: Create, Edit, or Delete Users.

Download Search Cell Notes Results
Release: 2022-09-10

When you search cell notes on the Sheets Overview page, we display a new Download button that you can use to download the search results.

We only display the new button after you run your search. The download also only includes the data that we display in the search results.

Separate Session Timeouts
Release: 2022-09-10

We now enable Workday Adaptive Planning customers to manage the session timeout for their Adaptive Planning instances separately from Workday. This provides the flexibility to configure two individual session timeouts each for:

- Workday core applications
- Adaptive Planning applications

Note: You must contact your Named Support Contact to enable this functionality.

Attributes Support on Reports for Linked Accounts with Applied Dimensions
Release: 2022-09-10

We now enable you to report on the dimension attributes for linked general ledger and custom accounts with applied dimensions.

Dimensions Order on Cube Sheets
Release: 2022-09-10

For consistency, we now display your cube sheet dimensions in the order that you set them on the sheet builder on:

- Cube sheets.
- Cube sheets on dashboards.
- Printable view of cube sheets.

Initial Balance Columns on Cube Sheets
Release: 2022-09-10

We now prevent you from entering formulas on the initial balance columns of cube sheets. If any formulas already exist on initial balance columns on sheets, after you make a new change in the cell, we then prevent you from making additional changes in the cell.

If your cube sheet imports include formulas on the initial balance columns, we now:

- Enable the import to succeed when no other errors exist.
- Display a new error that instructs you to remove the formulas and use numbers instead.
- Don't import the initial balance columns.

Reset User Sync Mapping Between Workday and Adaptive Planning
Release: 2022-11-11

To maintain data integrity with user sync mapping, we deliver a new Reset User Sync Mapping with Adaptive Planning task (secured to the Security Administration domain).

You can use the task to clear the synced mapping for users in Workday. Then you can run these tasks to enable users to sign in to Adaptive Planning:

- Pre-sync: Sends user accounts from Adaptive Planning to Workday.
- Sync: Sends the Workday ID for each account from Workday to Adaptive Planning.

You can access those tasks from the Tenant Setup Report, Adaptive Planning tab, and then User Sync tab.

Note: This update is only available in Preview tenants. We don't plan to deliver this to Production tenants.

2022R1 Release Notes

2022R1 Service Pack Releases

Release: 2022-06-10

Download Button on Modeled Sheets Toolbar

Release: 2022-04-08

- Adaptive Planning Sign-in Page
- Security APIs for Adaptive Planning on page 54

Update and Append Structures for Imports

With 2022R1, we enable you to add new values and update existing account, level, and dimension structures with 1 import, saving you time and effort.

Watch the video: 2m 34s

Update and Append Account Structures

Release: 2022-03-12

We remove the Update option and the Append option when you import the account structure in the Accounts area of Modeling for these account types:

- Assumption.
- Custom.
- Cube: All types of accounts on cube sheets.
- General ledger.
- Metric.
- Modeled: All types of accounts on modeled sheets.

Instead, we deliver a new Update and Append option. When you use the new option, your import now includes all properties and metadata, such as multi-link accounts and account attributes. This enables you to add new accounts and update existing account settings with 1 import.

See Import and Export Accounts.

Update and Append Level Structures

Release: 2022-03-12

We remove the Update option and the Append option when you import your level structure in the Level area of Modeling.

Instead, we deliver a new Update and Append option. When you use the new option, your import now includes all level properties and metadata, such as level attributes, enabling you to add new levels and update existing levels with 1 import.

See Import and Export Levels.

Update and Append Custom Dimension Structures

Release: 2022-03-12

We remove the Update option and the Append option when you import your custom dimension structures in the Dimensions area of Modeling.

Instead, we deliver a new Update and Append option. When you use the new option, your import now includes all dimension and dimension value properties, such as dimension attributes. This enables you to add new dimension values and update existing values with 1 import.

See Import Dimension Mappings.

Import and Export Availabilities in Sheets

We now enable you to import and export availabilities for quick updates to your cube and modeled sheets. You can also export a simple and scannable presentation of what's currently available on the sheet. This enables you to then make changes to the spreadsheet and import it.

Watch the video: 4m 19s

Cube Sheet Import and Export Availabilities

Release: 2022-03-12

In the Dimensions, Attributes and Levels section on the cube sheet building area in Modeling, we add new import and export links in the settings for the Level column and columns for accounts, attributes, and custom dimensions.

In each column type, we enable you to use a new template or your updated export to indicate the levels, accounts, or dimension and attribute values you want to appear on the sheet.

In the template for custom dimension values, we also enable you to confirm that you are deleting data when you remove custom dimension values.

See Steps: Change Availabilities in Cube Sheets.

Modeled Sheet Import and Export Availabilities

Release: 2022-03-12

In the Columns and Levels section of the modeling sheet building area in Modeling, we provide new import and export links in the settings for the Level column and dimension columns.

In each column type, we enable you to use a new template for your updated export to indicate the levels or dimension values you want to appear on the sheet.

In the template for custom dimension values, we also enable you to indicate how to handle the data if you remove a dimension value from the sheet:

- Delete: Removes the data.
- Move to next available ancestor: Adds data to the rollup.
- Set to none: Adds the data to the uncategorized dimension value.

See Change Availabilities in Modeled Sheets.

Sheet Availability API

Release: 2022-03-12

We deliver the new Sheet Availability JSON formatted REST API, enabling you to import and export sheet availabilities.

This new endpoint supports GET and POST, enabling query parameters for:

- sheetName
- columnName
- columnCode
- columnType
- instanceCode
- limit
- offset

See Sheet Availability

Adaptive Planning User Experience

We continue to align the Workday Adaptive Planning interface with Workday to provide a more consistent user experience. We update the layout of the matrix report viewer and dashboard overview. We also make Adaptive Planning easier to use by delivering several accessibility improvements to the matrix report viewer.

Watch the video: 4 min 30 s

Dashboards Overview

Release: 2022-03-12

We update the overview page for dashboards by providing a new:

- Action to **Open Checked Out Copy** from shared perspectives and **Open Shared Copy** from personal perspectives.
- Action to **Open Live Perspective** from snapshots and schedules.
- Created By column update enabling you to click on names to send emails.

- Navigation section enabling you to add new perspectives and access personal and shared perspective folders. We also enable you to collapse or expand the navigation section.
- Search field enabling you to find items based on file name.
- Status column that indicates if a perspective is locked or checked out.

We also:

- Add toast confirmation messages for actions like deleting, creating, and saving.
- Move the Snapshot Schedule in the perspective menu for easier access.
- Redesign the dialogue for Share Perspectives.

Also, when you check out a perspective from the Shared folder, the Personal folder now opens with the checked out version.

Note: To disable the new dashboards overview user interface, you must deselect the **Dashboards Overview** check box on the Visual Preferences page in Administration.

See Concept: Dashboards.

Dashboards Viewer

Release: 2022-03-12

To improve the user experience, we redesign the viewer page for dashboards by providing new:

- Chart drill down updates that include a title for each chart and layout improvements.
- Looks for icons, hover text, dialogue boxes, and dashboard tabs.

Settings of the Consolidation Percentages Sheet

Release: 2022-03-12

In the Settings of the Consolidation Percentages Sheets in Modeling, we rename these fields:

- System Account to Minority Interest Account.
- Net Income Account to General Ledger Account.

We also update the tooltips to clarify the purpose of the fields.

See Choose Consolidation Methods.

Matrix Reports

Release: 2022-03-12

To provide a more seamless user experience, we update matrix reports in Adaptive Planning by:

- Adding a new contextual menu that enables you to drill down and add notes.
- Delivering a new toolbar that combines all relevant options and actions.
- Enabling you to refresh the report without going back to the overview page.
- Providing support for multiple report parameters that appear within the report viewer context, instead of on a separate page.
- Removing the top panel and instead delivering an information panel on the right of the report.

Note: When you access matrix reports using Internet Explorer 11, we continue to display the old user interface even if you enable the latest user interface updates for Matrix Report Viewer from Visual Preferences. Microsoft plans to retire Internet Explorer 11 in June 2022.

See Concept: Matrix Reports.

Accessibility

Release: 2022-03-12

We improve accessibility to help comply with the Web Content Accessibility Guidelines 2.1.

For assistive technology support with screen readers and magnifiers, we deliver:

- High-contrast color.
- Keyboard shortcuts.
- Screen navigation with logical tabbing and alt text for images.

On high-use pages, we deliver a:

- Matrix Report Viewer
- Dashboard Overview
- Dashboard Viewer
- Workflow

We also add new keyboard shortcuts to the Matrix Report Viewer to provide accessible navigation.

Note: The new dashboard viewer doesn't support the accessibility improvements in scorecards, sheets, dimension mappings, and crosstabs.

See Reference: Accessibility in Adaptive Planning.

Remember Locations for Web Reports

Release: 2022-03-12

We now remember your locations when you navigate across the reports overview and reports pages. This includes:

- After you navigate to the Home page and then click the browser Back button.
- After you perform a search.
- The folder where you accessed the report.
- The paginated page you were on.

When you first sign in to reports, we automatically select the Favorites folder. Then, we select the report folder that you were last in.

Delay the New Interface Changes by Feature

Release: 2022-03-12

For convenience, we now enable you to delay the latest user interface changes by feature until the next release. This enables you to complete important business tasks in a familiar setting.

We deliver a new Apply Latest User Interface Updates check box on the Visual Preferences page in your general settings. We automatically select the new check box to enable these new features:

- Dashboard Overview
- Matrix Reports Viewer
- Workflow

When you deselect the new check box to delay a feature until the next release, we revert the user interface to the state prior to the current release.

See Change Visual Preferences.

Workflow Page

Release: 2022-03-12

We update the Workflow page by:

- Delivering a new navigation section, enabling you to access either your levels or your sheets.
- Redesigning the user interface of the table that displays the levels, including new icons for every Workflow status.

- Removing the Search tab. Instead, we now display the search results in the levels and sheets table area when you use the search bar.

Depending on if you select a level or sheet, we rename the Details panel to either:

- Level Workflow Status
- Sheet Workflow Status

We also:

- Display links to email users on the Last Updated By column.
- Display toast messages to confirm if your action was completed when you try to save, submit, approve, reject, or reset a note.
- Provide a new look to the Level Workflow Status or Sheet Workflow Status panel, such as moving the Last Updated By field to the top. We also now display the panel only after you select a level or sheet.

Note: To disable the new Workflow user interface, you must deselect the Workflow check box on the Visual Preferences page in Administration.

Process Guide
Release: 2022-03-12

With this update, we redesign the user interface of the task section in your Process Guide for reports, dashboard, workflow, and perspective task types. We also add:

- More minimalistic Description and Notes tabs.
- Rounded buttons on all dialogs.

Easier Source Sheet Selection for Merged Cube Sheets
Release: 2022-03-12

We deliver new check boxes that you can use to select source sheets in the Settings on merged cube sheets.

Dimension Mapping Tables on Dashboards
Release: 2022-03-12

We improve the navigation and context for dimension mapping tables on dashboards by now:

- Paginating dimension mapping tables. Each page contains 50 rows.
- Opening the last page when you create a row.
- Taking you to the first page when there are errors.
- Displaying an error message when you encounter an error.

Remove What's New Carousel Page
Release: 2022-03-12

We now remove the What's New page in Adaptive Planning. We also no longer show the What's New page as the initial page after a new release.

We also remove the:

- Option to set the What's New page as a Home page. If the What's New page is set as your Home page, we automatically change your Home page to now display the Welcome page.
- What's New option from the main navigation menu in Support tab.

Instead, you can access What's New documentation in the Workday Adaptive Planning Help Center.

Adaptive Planning Sign-in Page
Release: 2022-04-08

To improve the user experience, we redesign the Workday Adaptive Planning sign-in page by providing:

- A new simplified layout.
- A new field and button names.

We also remove customer service and support numbers. We recommend you use the Workday Customer Center for customer service and support.

Adaptive Planning - Miscellaneous Enhancements

customReportValues API Supports Calculation Elements

Release: 2022-03-12

We now support matrix report calculation elements in the customReportValues API. This enables you to build report-specific calculations based on column or row references to provide subtotals, variance, or other calculations.

See customReportValues.

Easier to Read Access Rule Exports

Release: 2022-03-12

We add new alternating color indicators in access rule exports, making them easier to read.

Cookie Status

Release: 2022-03-12

Workday updates the default cookie status to secure SameSite=strict across the platform to help reduce cross-site cookie attacks. This change might affect custom iFrame integrations and embedded Salesforce integrations.

Note: For Salesforce integrations, we recommend that you refer to Salesforce documentation for custom tab considerations.

Master Formula Changes to Default Formula

Release: 2022-03-12

With this update, we rename the Master Formula label in account settings to Default Formula.

Download Button on Modeled Sheets Toolbar

Release: 2022-06-10

When you download a modeled sheet from its toolbar, you can now select from a new prompt to either directly download the sheet or have Workday display a printable view. We no longer enable you to automatically download a sheet by clicking the Download button in its toolbar.

OfficeConnect Availability for Financial Management

Workday introduces OfficeConnect availability for Workday Financial Management, enabling accounting, finance, and report writers to create reports with Workday data in Excel. You can use the OfficeConnect Excel Add-in to simplify how you perform ad hoc financial analysis and create financial-related reports on journal lines. With OfficeConnect you can connect directly to Workday, leveraging application security, dimensionality, and business rules such as consolidations and currency translations. Prism Analytics users can also enable additional capabilities.

You must meet certain requirements to use this feature.

Watch the video: 3 min 30 s

Enable OfficeConnect for Workday Financial Management

Release: 2022-03-12

We now enable you to set up an OfficeConnect connection to Workday Financial Management on the OfficeConnect tab of the Tenant Setup – Financials task. This generates the API client ID and URLs that you can use to create a tenant connection to the Financials data source.

When report users log in to OfficeConnect, they can select this connection to generate financial reports.

OfficeConnect Financial Data Source

Release: 2022-03-12

We deliver a new Access Workday Financials OfficeConnect domain in the System functional area, enabling you to configure permissions for Financials in OfficeConnect configuration. When you sign in to a Workday tenant from OfficeConnect, we also now enable you to select from the Financials data source.

Selecting a data source ensures that you use the correct data model for generating reports.

Set Up Financial Reporting Data Model

Release: 2022-03-12

We deliver a new Set Up Financial Reporting and Analytics Data Model task (secured to the new Set Up: Financial Reporting and Analytics Data Model domain) that you can use to define the financial reporting data model for OfficeConnect. When you complete this task, Workday prepares the Financials data source in OfficeConnect with your financials data according to configured dimensions.

The financial reporting data model:

- Is a curated subset of elements selected from the Workday Financial data model (FDM).
- Determines which information from the FDM, such as which company hierarchies, ledger account hierarchies, and dimensions, is available for analyzing and reporting on in OfficeConnect.

Tenant Name in OfficeConnect Reporting Pane

Release: 2022-03-12

We now display the data source in the Reporting task pane in OfficeConnect for both Adaptive Planning and Financial Management.

Also, in OfficeConnect for Financial Management only, we prefix the data model name with the description from the Manage Tenants dialog.

This clarifies the data source and what data model they're using in OfficeConnect.

See Concept: OfficeConnect for Excel Interface Tour.

Administrator Guide Links

See:

- Enable OffieConnect for Workday Financial Management
- Concept: Reporting on the Financial Modeled Data Source
- Concept: The Financial Reporting Data Model

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OfficeConnect and Excel Interface for Planning Installations

We now include the Microsoft Edge web browser in the OfficeConnect and Excel Interface for Planning installations.

This web browser replaces Internet Explorer which Microsoft plans to retire in the near future.

New Web Browser for Login

Release: 2022-03-12

In preparation for Microsoft's plans to retire Internet Explorer, both OfficeConnect and EIP add-ins now transition to Microsoft Edge. The new web browser requires:

- WebView2 Runtime
- .Net 4.8

If you haven't already installed the new web browser requirements, you must have administrator permissions to upgrade to the latest version of the add-ins.

See Reference: OfficeConnect Technical Requirements.

Level, Dimension, and Attribute Codes for Display Names

We continue to enhance level, dimension, and attribute codes for display names. We enable attribute tagging in APIs and Excel imports by attribute code and attribute name. We also support duplicate labels in older OfficeConnect reports.

Watch the video: 3m 44s

Attribute Tagging for Bulk APIs

Release: 2022-03-12

We now enable attribute tagging using both attribute code and name in API v32 for:

- exportAccounts responses.
- exportDimensions responses.
- exportLevels responses.
- updateAccounts requests and responses.
- updateLevels requests and responses.
- updateDimensions requests and responses.

See API Changes by Release, updateAccounts,updateDimensions, updateLevels, exportAccounts, exportDimensions,

Attribute Tagging for Excel Dimension Structure Imports

Release: 2022-03-12

We now enable attribute tagging for dimension Excel structure imports. We also now include columns in import templates for attribute code and attribute name.

See Concept: Level, Dimension, and Attribute Codes for Display Names, Import Metadata Using Name and Code

OfficeConnect Report Labels Support Display Names

Release: 2022-03-12

For all OfficeConnect report elements, we now provide the Display Name label type value in label definitions. This supports duplicate metadata names in Adaptive Planning.

Note: You can now use display names for instances that you enable for Excel Interface for Planning and for instances that include a modeled sheet that you set up to define anomaly thresholds.

Before enabling display names, you must submit all pending changes in saved workbooks. This ensures that you don't get a warning for each duplicate pending change.

See:

- Concept: Level, Dimension, and Attribute Codes for Display Names
- Steps: Add Report Labels.

Display Names Automatically Available to All Adaptive Planning Customers
Release: 2022-03-12

We automatically enable Level, Dimension, and Attribute codes for Display Names for all Adaptive Planning customers.

Note: Anomaly detection thresholds in sheets will continue to function if you enter level codes instead of level names.

Level, Dimension, and Attribute Codes in Import Templates
Release: 2022-03-12

Import template formats and instructions within Integration > Import Data now indicate the need for codes as unique identifiers in imports for:

- Standard Data Import
- Cube Sheet Data Import
- Modeled Sheet Data Import
- Transaction Data Import

Any dimension columns split into 2 columns:

- Dimension Code
- Dimension Name

To automatically create new dimension values at import for a dimension, the Dimension Code and Dimension Name columns must be populated for the dimension value.

Levels column headers now indicate:

- Level Code

Accounts column headers now supports either of these as the label:

- Account Code
- Account

Note: Download new templates and follow the instructions in the first sheet. Templates downloaded before March 2022 may not work.

See Spreadsheet Import, Reference: Settings for Levels, Create Attributes.

Check Box and Toggle Columns on Modeled Sheets

With 2022R1, we enable you to use check box and toggle columns on modeled sheets and in Excel Interface for Planning without having to purchase Sales Planning. We also improve how you use the columns in Excel Interface for Planning and data imports by only enabling you to enter 0 or 1, streamlining data entry and processing.

Check Box and Toggle Columns in Excel Interface for Planning without Sales Planning
Release: 2022-03-12

We now enable you to use check box and toggle columns in Excel Interface for Planning without having to purchase Sales Planning. When you add a Checkbox data entry column in Model Administration and configure it, we display the column on your Excel Interface for Planning sheet after you load the sheet.

Check Box Data Entry Column in Model Builder and Modeled Sheets without Sales Planning
Release: 2022-03-12

We now enable you to add a Checkbox data entry column on your modeled sheets without having to purchase Sales Planning. When you add a Checkbox data entry column in Model Administration and configure it, we display the column on your modeled sheet.

This enables you to enforce consistent values and create more dynamic models that drive calculations on whether or not you select the check box.

Example: You can create a formula where if(checkbox.column=1, use one calculation, and if checkbox.column=0, use another calculation). This enables the model to present different values on row details based on whether or not you select the check box.

See Reference: Modeled Sheet Column Properties.

Check Box and Toggle Columns in Excel Interface for Planning
Release: 2022-03-12

You can now only enter a 0 or 1 in check box and toggle columns on your Excel Interface for Planning sheets. You can either leave the cell blank or enter:

- 0 for off.
- 1 for on.

This enables you to enforce consistent values and create more dynamic models that drive calculations on whether or not you select this check box. Example: You can create a formula where if(checkbox.column=1, use one calculation, and if checkbox.column=0, use another calculation). This enables the model to present different values on row details based on whether or not you select the check box.

We don't automatically change any existing check box and toggle column values on your Excel Interface for Planning sheets. We continue to display your modeled reports whether or not your check box and toggle column values follow this new restriction.

Upload Modeled Sheets with Check Box and Toggle Columns
Release: 2022-03-12

When you upload modeled sheets in Model Administration, you can now only upload a 0 or 1 in check box and toggle columns. You can either leave the cell blank or upload:

- 0 for off.
- 1 for on.

This enables you to create enforce consistent values and more dynamic models that drive calculations on whether or not you select this check box. Example: You can create a formula where if(checkbox.column=1, use one calculation, and if checkbox.column=0, use another calculation). This enables the model to present different values on row details based on whether or not you select the check box.

We don't automatically change any existing check box and toggle column values on your modeled sheets. We continue to display your modeled reports whether or not your check box and toggle column values follow this new restriction.

See Spreadsheet Import.

Cell Explorer in Cube Sheets

With this release, we improve Explore Cell functionality in cube sheets. When you click a link in Cell Explorer to adjust data that's visible in another sheet, we now filter the target sheet by the same dimension you select on the first sheet, improving efficiency. We also now support Dimension values for enhanced flexibility.

Links to Cube Sheets from Explore Cell
Release: 2022-03-12

When you click on a cube sheet link from Cell Explorer to adjust data that's visible on that other sheet, we now automatically filter the target cube sheet by the same dimensions that you select on the first cube sheet.

We only automatically filter on the target cube sheet for all dimensions that the source and target sheets share. When the target cube sheet includes dimensions or dimension attributes that don't exist on the source sheet, we automatically select All on those dimension and dimension attribute filters.

Hide and Unhide Columns on Modeled Sheets

With this release, we enable you to hide or unhide columns on modeled sheets, making it faster and easier to find what you need.

Download Drop-Down Menu on Modeled Sheets
Release: 2022-03-12

We add a new Download drop-down menu on your modeled sheets toolbar, enabling you to download either:

- The printable view of your modeled sheet, which excludes all hidden values and respects your current view state, or
- Your modeled sheet and include all hidden values and codes.

See Reference: Sheet Toolbar.

Copy and Paste for Hidden Columns
Release: 2022-03-12

When you copy a row on modeled sheets and the row contains hidden columns, we now include the hidden column values when you paste the row.

We continue to skip hidden values when you copy and paste a range.

See Reference: Copy and Paste.

Hide Columns Section in Display Options of Modeled Sheets and Sheets on Dashboards
Release: 2022-03-12

We add a new Hide Columns section on the Display Options menu in modeled sheets, enabling sheets users to select which columns to hide. You can deselect the Hide Column check box for columns on a modeled sheet to prevent sheet users from hiding the columns.

Also, we display carat icons with tooltips in the column headers to indicate hidden columns.

We also display the new Hide Columns section, carat icons, and tooltips in sheets on dashboards.

When you hide columns on sheets or sheets on dashboards:

- We still enable you to filter the columns.
- We don't include any hidden column values when you copy and paste a data range or copy rows.
- If they're split columns and you copy the columns, we don't copy over the values from the hidden columns.
- We now restrict you from splitting an entire row when you hide all splitable columns.

See Change Modeled Sheet View.

Allow users to hide columns in Display Options Check Box in Model Management
Release: 2022-03-12

We add a new Allow Users to Hide Columns in Display Options check box that you can use for these column types on your modeled sheets in Model Management:

- All Attributes.
- All Dimensions.
- All Display Columns.
- Only the following Data Entry Columns: Text, Number, Date, Initial Balance, and Checkbox.

This enables your sheets users to hide or unhide the columns when they view the modeled sheets.

You can't enable users to hide these column types:

- Level.
- Text Selector.
- Timespan.

You can only select the new check box when you deselect the Required Column check box. You can enable users to hide columns even if you also select the Read Only check box.

See Reference: Modeled Sheet Column Properties.

Hidden Columns on Dashboard Sheets

Release: 2022-03-12

We now enable you to configure a dashboards perspective with hidden columns, making it automatically display for all users you share the perspective with. Your users can still change their view state as well as hide or unhide columns.

Note: When you click the Reset to Default option, we revert the perspective back to the admin-set view state, which may contain hidden columns.

Filter Display Columns on Modeled Sheets

We enable you to filter modeled sheet rows using calculated account display columns for calculated accounts, making it faster and easier to find what you need.

Filter Calculated Account Display Columns

Release: 2022-03-12

We now enable you to filter rows using calculated account display columns on:

- The Display Options of your modeled sheets.
- Excel Interface for Planning sheets.

Workforce Planning Actions for Job Requisitions and Positions

We continue to streamline how you make changes to your workforce in HCM from an approved workforce plan in Adaptive Planning. If you use a job management staffing model or timespan to plan for new positions, you can now create job requisitions and positions in HCM when you publish your workforce plan.

Mappings for Create Job Requisition and Create Position

Release: 2022-03-12

We improve the mappings for the Create Job Requisitions and Create Positions tasks to include new mapping choices for the Number of Positions and Date fields.

For the Number of Positions field, you can map:

- Per Position to specify any whole number from 1 to 100.
- Timespan to select a date range.

For the Date Field, you can map:

- Timespan (Period Start Date).
- All date columns.

See Publish Workforce Planning Actions from Adaptive Planning.

Recruiting Start Date for Create Job Requisition

Release: 2022-03-12

When you map fields for publishing with the Create Job Requisition task, we now require you to add a recruiting start date.

Note: If you don't enter a recruiting start date in Adaptive Planning, we use the date when it's published.

See Publish Workforce Planning Actions from Adaptive Planning.

Number of Positions Column on View Publish Page

Release: 2022-03-12

We add a new Number of Positions column on the View Publish page, enabling you to view the number of positions that you create during the publish.

See Concept: Publish Plans from Adaptive Planning.

Publish to Create Job Requisitions and Positions

Release: 2022-03-12

We now enable you to publish from a modeled sheet or the Publish page in Adaptive Planning to create job requisitions and positions when you create:

- Job requisitions using the job management staffing model and timespan, and plan for multiple openings per modeled sheet row.
- Job requisitions using the position management staffing model and timespan, and plan for 1 opening per modeled sheet row.
- Positions using the position management staffing model and timespan, and plan for multiple positions per modeled sheet row.
- Positions using the position management staffing model and timespan, and plan for 1 position per modeled sheet row.

Note: To create job requisitions, we only support expediting without review and require final submission through the Inbox item.

See Publish Workforce Planning Actions from Adaptive Planning.

Number Columns on Review Workforce Planning Actions

Release: 2022-03-12

We add a new Number of Positions column in the Create Position section on the Review Workforce Planning Actions task, enabling you to view the number of planned positions that you can review and create.

We also add a new Number of Openings column in the Create Job Requisition section on the task, enabling you to view the number of planned job requisition openings that you can review and create.

See Review Workforce Planning Actions.

Optimize Dashboard Loading

With this release we prompt to select a level filter and progressively load content in the viewable range to optimize dashboard loading.

Smart Dashboard Loading

Release: 2022-03-12

We now load dashboard content in the viewable range as you scroll. This helps to optimize performance by only loading the data you need.

Level Prompt

Release: 2022-03-12

We now display a warning when you don't select a perspective level filter. This helps to optimize load time and narrows the focus on your data.

We continue to automatically save your level filter selections in your browser.

API to Export Configurable Model Data

We update the exportConfigurableModelData API to now stream data for larger and more performant exports from modeled sheets.

Stream Data from Modeled Sheets

Release: 2022-02-04

We update the exportConfigurableModelData API to now stream data from modeled sheets. This enables:

- Increased export speed.
- Reduced restraints on the numbers of cells and rows for export.

  To use this functionality, you must update your API to v32. If you don't want streamed data from exportConfigurableModelData, you can continue to use v31 or lower.

  See exportConfigurableModelData.

NetSuite Basic Endpoint Upgrade

We upgrade all NetSuite Basic customers to the NetSuite 2021.1 endpoint. This ensures continuity of NetSuite support.

NetSuite Basic

Release: 2022-03-12

We automatically upgrade all NetSuite Basic customers to the new NetSuite 2021.1 endpoint.

We also remove these unsupported NetSuite Basic setup fields:

- NetSuite Basic Legacy SSO Login.
- System Type.

See Steps: Set Up NetSuite Basic Integration.

Access NetSuite File Cabinet Data

You can now access your NetSuite File Cabinet CSV files in NetSuite data sources in Workday Adaptive Planning Integrations. This simplifies the process of bringing data from your File Cabinet into tables in your NetSuite data sources.

Watch the video: 1 min 47 s

Manage File Cabinet

Release: 2022-03-12

You can now click Manage File Cabinet in the Actions pane of NetSuite data sources. This enables you to configure which files you pull in as data source tables, similar to our NetSuite Saved Searches interface. We provide File Cabinet configuration options to:

- Name
- Add
- Update
- Delete

Note: Manage File Cabinet only supports CSV files from your NetSuite File Cabinet.

See Steps: Set Up NetSuite Data Sources, Select NetSuite File Cabinet Files for Import.

Publish From Metdata Mappings

We now enable publishing plans from only the metadata mappings and ignoring data mappings. This helps you prevent duplicate or invalid data mappings since metadata mappings point to unique Workday WID values.

Metadata Mappings in Workday External Systems
Release: 2022-03-12

You can enable a new Metadata Mappings Only option in the Workday External Systems in Adaptive Planning. This option:

- Prevents using mappings from Actuals in planning data loaders for publishing.
- Publishes using only the metadata mappings from metadata loaders.

Note: We don't automatically apply this change to your existing Workday External Systems, but you can update them to use metadata mappings only.

See Set Up Workday External Systems for Adaptive Planning.

Report Partitioning in Workday Data Sources

You can now partition data retrieved from Workday reports in the Workday Data Sources in Adaptive Planning integrations. This saves you time and eliminates the need to manually join tables from multiple Workday reports.

Partition By Prompt Values and Default Partition Size
Release: 2022-03-12

When you select a report in Manage Reports, we enable these new fields:

- Partition By: For selecting Workday report prompt parameters to break up data from Workday reports.
- Default Partition Size: For selecting how many report prompt parameters to include in a partition.

Multi-instance objects populate 100 as the default partition size, which you can change. Single-instance objects or self-referencing objects populate 1 as the default partition size.

See Select Workday Reports in Workday Data Sources for Adaptive Planning.

Targeted Publishing

We now enable you to publish a subset of a plan's periods, improving the user experience and increasing publishing performance.

Publish by Period Range for Financial Plans
Release: 2022-03-12

You can now select the Publish by Period Range option when publishing a financial plan, instead of publishing all of the plan's time periods. When you select the option, you can also use these options on the Publish Plans page:

- From: The starting period for your publish.

- To: The ending period for your publish.

Note: You must select contiguous time periods to use this functionality.

See Concept: Publish Plans from Adaptive Planning

Adaptive Data Agent for Virtual Clean Room

The Adaptive Planning Data Agent now supports installation in Virtual Clean Rooms.

Adaptive Planning Data Agent in Virtual Clean Rooms

Release: 2022-03-12

You can now install the Adaptive Planning Data Agent using Virtual Clean Rooms.

Adaptive Planning Performance and Scalability

We now deliver performance and scalability improvements that enable you to model your business without compromising ease of use.

Support for 900 Concurrent Users

Release: 2022-03-12

We now enable up to 900 users to perform view and edit actions at the same time when:

- A single user view and edit action takes less than 5 seconds.
- Less than 20% of the concurrent users perform edit actions at the same time.
- You exclude administrative actions that involve massive changes to the data model.

Note: You must contact your Named Support Contact to enable this functionality.

Disposition: / Status:
add this new section for I.3 or I.4: (sub feature) Scalable Export of Model Sheet Data, (description) "We now increase the export limit for model sheet data from 10 million cells to 100 million cells. We also improve throughput to export 100 million cells under 30 mins."

Security APIs for Adaptive Planning

We deliver new security APIs that you can use to set up custom integrations. This reduces the need for manual effort, saving you time.

Note: You must contact your Named Support Contact to submit a request to enable this feature. Currently this feature is only available to customers with over 100 users.

Permission Set REST API

Release: 2022-04-08

We deliver a new Permission Set REST API endpoint. When you set up instance assignments, you can use the new endpoint to quickly assign Adaptive Planning permission sets to users.

See Permission Sets.

Multiple Instance User Access REST API

Release: 2022-04-08

We deliver a new Multi-Instance User Access REST API endpoint. When you link multiple Adaptive Planning instances, you can use the new endpoint to assign a user to multiple instances and designate the default instance.

See Instances.

importGroups API

Release: 2022-04-08

We deliver a new importGroups API that you can use to import Workday security groups and their associated users into Adaptive Planning. You can also use the new API to import user groups from external sources.

This enables you to use external user groups in planning security contexts, such as in processes, access rules, and version access.

See importGroups.

View External User Groups

Release: 2022-04-08

For convenience, you can now view external user groups, such as Workday security groups, in the Global User Groups section on the Administration page.

Note: You can't edit external user groups on the tab. We recommend that you use the new importGroups API to update external user groups instead.

See Create User Groups

Discovery Classic Retirement

We now retire Discovery Classic. We recommend that you use Workday Adaptive Planning Dashboards instead.

Retiring Discovery Classic

Release: 2022-03-31

We retire all discovery classic features on 2022-03-31.

2021R2 Release Notes

2021R2 Service Pack Releases

Release: 2022-02-11

Adaptive Planning Support and Feedback on page 74

Release: 2021-12-10

- New Explore Cell Functionality Available for Consolidation

Release: 2021-11-12

- Level, Dimension, and Attribute Codes for Display Names on page 70
- Merged Cube Sheets on page 74
- OfficeConnect System Variable Label Change
- OfficeConnect and EIP Login Page Change for License Agreement
- View Modeled Sheet Required Columns in EIP

Release: 2021-10-15

- Improved User Interface for Explore Cell on page 57
- Level, Dimension, and Attribute Codes for Display Names on page 70

- Download and Upload Mappings for Metadata Loaders on page 74
- Levels on Cube Sheet Data Imports on page 74

Disposition: / Status:

- This is a Test New Subfeature

Release: 2021-10-08

- Plan Publishing on page 69

Workforce Planning Actions for Job Requisitions

We continue to streamline your ability to make changes to your workforce in HCM from an approved workforce plan in Adaptive Planning. You can now create job requisitions in HCM when you publish your workforce plan.

Import Workforce Planning Actions Web Service
Release: 2021-09-11

Workday updates the Import Workforce Planning Actions web service to now support creating job requisitions directly in HCM.

We automatically use the web service when you publish your workforce plans.

Job Requisition Report Fields
Release: 2021-09-11

You can now use these report fields on routing rules, condition rules, and custom reports in the Job Requisition business process:

- Plan Version ID for Adaptive Planning Integration
- Publish Row ID

Edit Tenant Setup - HCM
Release: 2021-09-11

We deliver a new Route Create Job Requisition Events setting on the Edit Tenant Setup – HCM task that you can use to select security groups for routing Create Job Requisition events that are initiated from Adaptive Planning.

You can only select security groups or roles that have a Supervisory Organization role usage. You can't select unconstrained role-based security groups.

Create Job Requisition Workforce Action in Adaptive Planning
Release: 2021-09-11

We deliver a new Create Job Requisition workforce action that you can use when you publish from a modeled sheet in Adaptive Planning. Each job requisition row that you publish from your modeled sheet creates a job requisition in HCM.

Note: This functionality only supports expediting without review, and requires final submission through the Inbox item.

Adaptive Planning Level Ownership

We improve security by consolidating where we display level owners and where you can assign level owners.

Level Owners on the Levels Page
Release: 2021-09-11

On the Levels page in Model Management, we remove the:

- Export Level Owners button on the main toolbar.
- Level Owners column on the level tree.
- Level Owners field on the Level Details section.

To view or change level ownership, you can continue to access level ownership on these pages in Administration:

- Associations
- Users

Level Owners Column on Level Structure Imports and Printable View
Release: 2021-09-11

We remove the Level Ownership column from the spreadsheet that you use to import level structures.

We also no longer display the Level Ownership column when you download a printable view.

Workforce Planning Actions for Positions

We continue to streamline your ability to make changes to your workforce in HCM from an approved workforce plan in Adaptive Planning. Now, we reduce the amount of manual effort by enabling you to use Org Studio to create many positions from 1 line.

Import Workforce Planning Actions Web Service
Release: 2021-09-11

We update the Import Workforce Planning Actions web service so that when you publish your workforce plan, we now support:

- Creating a new org design.
- Indicating the period start date for each of the distinct positions created in a plan period.

We automatically use the web service when you publish your workforce plans.

Improved User Interface for Explore Cell

Note: We reverted this feature from Preview and Production tenants on 2021-9-15 due to technical issues. We reinstate it on 2021-10-14.

We continue to improve Explore Cell functionality to provide a better user experience. We now enable you to hide irrelevant rows, enhancing usability. Also, you can now set the maximum number of contributing rows to display in cell explorer, providing better visibility into your data.

Opt Out of the New Interface for Explore Cell

Release: 2021-10-14

For convenience, we now enable you to opt out of the latest Explore Cell user interface changes and functionality until the next release. This enables you to complete important business tasks in a familiar setting.

We provide a new Apply Latest User Interface Updates to Explore Cell check box on the Visual Preferences page in general settings. We automatically enable the setting so that you can use the newest updates before making your decision. When you disable the setting, we revert the user interface and functionality of Explore Cell to the state prior to the current release.

Suppress Zeros and Blanks

Release: 2021-10-14

We now automatically suppress rows with zeros or blanks every time you launch Explore Cell for data driven by contributing details. This simplifies your view, enabling you to see only details from levels, dimensions, accounts, and attributes that actually contribute to the value you're exploring.

We also provide this new check box on the bottom-left corner of the Explore Cell window: Suppress Rows when all Zeros or Blanks. This enables you to display rows with zeros and blanks.

See Concept: Explore Cell and Row Details.

User Interface Changes to Explore Cell

Release: 2021-10-14

To make it easier to find information, we move these details to the upper-left section in the Explore Cell window:

- Cell value.
- Links to audit trail and drill capabilities.
- Links to sheets that show the value.

Also, we move these details to the upper-right section in the Explore Cell window:

- Details about the account, level, time period.
- Arrows to click to the previous and next time period.

You can still find contributing details in the bottom of the window, such as source accounts, formulas, and sources of contributing values.

We now enable you to hover over the formula references to view the value or the value to view the formula reference.

See Concept: Explore Cell and Row Details.

Set the Maximum Number of Contributing Rows

Release: 2021-10-14

We deliver a new Cell Explorer Contributing Rows Limit setting on the General Setup page, enabling you to set the maximum number of rows to display in Explore Cell. We automatically set the maximum to 2,000.

Note: If you revert the Explore Cell user interface, the Modeled Sheet First Page Size setting on the General Setup page continues to control Explore Cell maximum rows.

See Reference: General Setup.

New Explore Cell Functionality Available for Consolidation

Release: 2021-12-10

You can now use the improved user interface and Explore Cell functionality in all tenants, including those with consolidation for values that have components like:

- Audit trail for journal entries.
- Consolidation ownership percentages.
- CTA accounts.
- Elimination rules.
- Journal entries.
- Minority interest.

You can also now suppress zeros for minority interest pages in cell explorer.

Change and Save Standard Sheet View

With this release, we automatically enable you to save more view options in sheets. This eliminates the need to change your view each time you open a sheet. You no longer must contact support to enable this capability.

View by Account or Level in Minimized View
Release: 2021-09-11

For convenience, in the minimized view on dashboards, you can now select to view by either:

- Account.
- Level.

Save Changes in Sheets and Dashboards
Release: 2021-09-11

We now enable you to save your sheet when you switch between the account and level views in:

- Maximized standard sheets on dashboards.
- Minimized standard sheets on dashboards.
- Standard sheets in the Sheets area.

In standard sheets, you can also now save changes that you make to:

- A pinned account or level.
- Your View By mode. We save your selection as your preferred view.

For convenience, we also persist your preferred view when you:

- Refresh or return to the page.
- Switch between the minimized and maximized views.

See Change Standard Sheet View.

Required Columns on Modeled Sheets

We now automatically deliver the ability to use required columns in modeled sheets. You no longer need to request this functionality.

Note: You can't use this feature when you use the Excel Interface for Planning (EIP) functionality.

Required Columns Setting
Release: 2021-09-11

We deliver a new Required Column check box in all custom dimension column settings on the modeled sheet administration page.

See Reference: Modeled Sheet Column Properties.

Required Column Indicator in Modeled Sheets
Release: 2021-09-11

To make it easier to identify required columns, we now:

- Display a red asterisk in the header of required columns.
- Highlight the cell when it's missing data.

See Reference: Colors and Notations in Sheets.

Modeled Sheet Data Import Required Columns
Release: 2021-09-11

When you mark a column as required, we now display the column in the mandatory columns section on the import file.

View Modeled Sheet Required Columns in EIP

Release: 2021-11-12

We now enable Excel Interface for Planning (EIP) users to view required columns in modeled sheets on both desktop and EIP. We also now display an asterisk in required columns on both desktop and EIP. This enables sheet viewers to know where they must enter data before saving the sheet.

When a user doesn't populate a required column, we display an error and navigate them to the specific column.

Calculated Accounts for Adaptive Planning

We continue to increase the flexibility of calculated accounts to help you preserve historical data when you add default formulas.

Watch the video: 4m 7s

Preserve Data When Adding Account Formulas

Release: 2021-09-11

We now enable you to preserve historical data when you add default formulas to general ledger and custom accounts. When you save new formulas, we provide a message that reminds you to click 1 of these options:

- Preserve, which creates data entry overrides for all existing versions, saving existing data, and also uses the default formula for all new versions. You can click None from the Override Formula Setting prompt to apply the formula to any existing version.
- Replace, which replaces all existing data, including data in locked versions, with the formula calculation.

See Add or Change Account Formulas and Overrides.

Cube Sheet Performance

With 2021R2, we improve cube sheet performance by enabling you to hide rollup totals. We also enhance the performance of viewing and downloading printable cube sheets.

Hide Cube Sheet Rollup Totals

Release: 2021-09-11

We provide a new check box on the Settings tab in sheets properties, enabling you to hide rollup totals if rows or columns are hidden with display options or on the sheet definition. This decreases the time it takes to load the sheet.

We automatically enable the check box for new cube sheets. We don't automatically enable it for existing cube sheets.

Note: Since row and column totals are hidden when you enable the check box, you can't use break back or explore cell options in the total row or column.

See Reference: Settings for Cube Sheets.

Export Performance for Cube Sheets

Release: 2021-09-11

We improve the export function of cube sheets by decreasing the time it takes to download the data.

Data in Sheets

We improve your interaction with data in sheets, enabling you to enter and analyze data more intuitively.

Limited Breakback Options

Release: 2021-09-11

We now only display the Proportionally breakback option when you suppress zeros and blanks on sheets. This helps to prevent unexpected data from populating into cells.

Remove Total Rows for Account Groups in Cube Sheet

Release: 2021-09-11

We remove the rows that display totals of account groups in cube sheets from all sheet display configurations.

Adaptive Planning User Experience

We continue to align the Workday Adaptive Planning interface with Workday. We update the layout of the Explore Cell window, sheets overview page, web reports overview, and the contextual help experience. We also provide pagination and search capabilities to improve heavy-content pages, such as the Associations page and the Access Rules page. We also make Adaptive Planning easier to use by delivering several accessibility improvements, such as keyboard navigation and screen reader support.

Watch the video: 2m 58s

Delay the New Interface Changes

Release: 2021-09-11

For convenience, we now enable you to delay the latest user interface changes of each release until the next release. This enables you to complete important business tasks in a familiar setting.

We provide a new Apply Latest User Interface Updates check box on the Visual Preferences page in general settings. We automatically enable the setting so that you can use the newest updates before making your decision. When you disable the setting, we revert the user interface to the state prior to the current release.

By the setting, we also display a list of features that are currently switched on or off. We update the list with each release.

See Change Visual Preferences.

Explore Cell

Release: 2021-10-14

See Improved User Interface for Explore Cell on page 57.

Sheets Overview

Release: 2021-09-11

We now provide:

- A new look to the Levels drop-down list, including a new icon for elimination levels.
- A new More icon in the toolbar where you can select Search Cell Notes or Search Audit Trail.
- A new navigation section, enabling you to access either level-assigned sheets or assumption sheets. We also enable you to collapse or expand the navigation section.
- A new search field, enabling you to enter keywords to find sheets.
- New sorting abilities, enabling you to sort the sheet names in descending or ascending alphabetical order.

See Concept: Sheets Quick Tour.

Reports Overview
Release: 2021-09-11

To provide a more consistent user experience, we update the reports overview page by delivering a new:

- All option in the navigation, enabling you to access all your reports across all folders.
- Breadcrumb trail, making it easier to navigate the folder structure.
- Contextual search, making it easier to find reports within a folder.
- Icon that you can use to access the contextual menu for a report on each row.

Also, we add new arrow icons that enable you to reorder files in the Favorites folder.

We also update the the Add New menu by:

- Adding an option to create a new folder.
- Moving it to the left side of the page.

See Concept: Reports Quick Tour.

Disposition: / Status:
(section title: Matrix Reports) section content: To provide a more seamless user experience, we update matrix reports throughout Adaptive Planning by:

- Delivering a new toolbar that combines all relevant options and actions available to you.
- Enabling you to refresh the report without going back to the overview page.
- Providing support for multiple report parameters that appear within the report viewer context, instead of on a separate page.
- Removing the top panel and instead deliver an information panel on the right of the report.
- Adding a new contextual menu that enables you to drill down and add notes.
- Providing support for up to 100 segments on any report axis, instead of 30 segments.

Note: To use this functionality, contact Adaptive Planning Account Provisioning.

See Concept: Matrix Report Viewer.

Workflow Status Updates
Release: 2021-09-11

We provide a new interface for Workflow status updates on the Sheets Overview page. The Workflow Status section opens on the right of the screen. In the new section, we enable you to see who last updated the status, add a note, or change the status.

We enable you to open the Workflow Status section by clicking the:

- Status indicator next to the sheet name for assumption sheets.
- Workflow Status indicator from the toolbar for level-assigned sheets.

We also enable you to sort assumption sheets by Workflow status.

See Steps: Use Workflow.

View Details on Associations
Release: 2021-09-11

When you click the View Details option on an association in Administration, we now display:

- A search bar.
- Pagination.

This improves performance, making it faster and easier to find what you need.

Associated Users Column on the Associations Page
Release: 2021-09-11

We remove the Associated Users column on the Associations page in administration. You can continue to access the associated users when you view details on the association.

Pagination on Access Rules Page
Release: 2021-09-11

We now display pagination on the Access Rules page in administration, improving performance by making it faster and easier to find what you need.

Accessibility
Release: 2021-09-11

We improve accessibility to help comply with the Web Content Accessibility Guidelines 2.1:

- Assistive technology support with screen readers and magnifiers.
- High contrast color.
- Keyboard shortcuts.
- Screen navigation with logical tabbing, alt text for images.

We provide these accessibility features on high-use pages:

- Explore Cell
- Login Page
- Reports Overview
- Sheets Overview
- Welcome Page

Note: You can't use the new Explore Cell user interface and related accessibility in instances with consolidation capabilities.

New Help Center and Contextual Help
Release: 2021-09-11

We provide a new documentation site to provide a more consistent user experience with the Workday Administrator Guide.

We update:

- Documentation links, including contextual help, to now direct you to the new documentation site.
- Links to the retired Workday Adaptive Planning Knowledge Center to now direct you to new Workday Adaptive Planning Help Center Home page.

Note: The Japanese localized content is not yet available. We plan to deliver it in a future update.

Japanese Localized Content in Help Center
Release: 2021-10-15

We now support Japanese localized content in the Adaptive Planning Help Center.

OfficeConnect Ad Hoc Analysis

With this release, we continue to improve the OfficeConnect ad hoc analysis functionality. We now enable users to quickly apply and expand elements, providing faster dimensional analysis.

Apply and Expand Elements
Release: 2021-09-11

We now enable you to apply and expand elements from the Elements pane in a single action. Previously, you had to first apply the element to your report and then expand it as separate actions.

You can use the Apply and Expand option from either areas:

- The right-click context menu in the Elements pane.
- The Elements group of buttons in the OfficeConnect tab.

Expand to Any Level
Release: 2021-09-11

We now enable you to expand a parent element to any level within its hierarchy. The default expansion displays only the elements at the hierarchy level you select.

To override the default, uncheck the option to exclude ancestors from the expansion.

Exclude Uncategorized Elements from an Expansion
Release: 2021-09-11

We now provide a new workbook property that enables you to exclude the uncategorized and Only elements from an expansion.

Example: You can exclude these uncategorized and Only elements when you expand the parent element:

- Prduct (Uncat)
- United States (Only)

Expand to Any Level with Multiple Parents
Release: 2021-09-11

We now enable you to expand a single parent element to any level within its hierarchy. The default expansion displays only the elements at the hierarchy level that you select.

To override the default option, you can unselect the option to exclude ancestors from the expansion. When multiple parent elements exist at the same location, you can select a single parent to expand in the Elements section.

See Steps: Explore Reports Using Ad Hoc Analysis.

Perspective Context Filters

You can now mass apply multiple perspective filter changes in dashboards. This enables you to quickly correct data intersections and saves time by avoiding a refresh after each filter selection.

Disposition: / Status:

Note: This functionality is initially only available to Adaptive Planning beta customers. We'll enable it for all customers on 2021-09-11.

Save Perspective Filter Selections

Release: 2021-09-11

We now automatically save your dashboard perspective filters in your web browser when you change filter selections.

Perspective Context Bulk Filter Selection

Release: 2021-09-11

We now provide a new filter button in dashboards that enables you to change multiple perspective filters in bulk.

We also provide a new Reset to Default button from the new filter button in dashboards, enabling you to reset perspective filter settings to the last published state.

See Change Perspective Filters in Bulk.

Erase Data in Adaptive Planning

With Workday 2021R2, we continue to enhance the Erase Data functionality. You can now erase plan or actuals data. This improves the user experience and provides more consistency with the user interface of the eraseData API and the Integration loaders.

Watch the video: 3m 43s

Note: Access rules don't apply to the Erase Data functionality. Any user with access to Erase Data can delete data for any level, version, account, and time intersection.

Erase Actuals Menu Renamed Erase Data

Release: 2021-09-11

We now enable you to erase plan data from general ledger, custom, and cube accounts based on the version and level you select. For consistency, we rename the Erase Actuals menu to Erase Data.

See Erase Data

Select Versions

Release: 2021-09-11

With this update, we enable you to select any non-virtual or plan version when you delete data from Adaptive Planning using the Erase Data main navigation menu.

See Erase Data

Select Accounts

Release: 2021-09-11

We now enable you to delete the GL, custom, or cube account data. When you choose a rollup account, we delete the data in its child accounts.

We also enable you to erase plan data from calculated accounts with a data entry override. When you erase plan data from a calculated account that:

- Contains data, we delete all data from the calculated account.
- Is an aggregation of a source account, then we don't delete any data.

See Erase Data

Select Levels

Release: 2021-09-11

With this update, we enable you to select the levels you want to delete data from. When you select a parent level, we automatically select its child levels.

We also add a new Select All Levels option that you can use to delete data from all levels.

See Erase Data

Erase Data Permission

Release: 2021-09-11

For consistency, we rename the Erase Actuals permission to Erase Data in the Permission Sets admin page. If a user already had Erase Actuals permissions, we automatically add them to the Erase Data permission.

Note: Users must have access to the Import to All Locations permission before you can add them to the Erase Data permission.

See Reference: Available Permissions

Enable Erase Data in General Setup

Release: 2021-09-11

You can now enable the Erase Data tab for your Planning Data Loaders from Administration > General Setup by clicking Enable Integration Loaders – Erase Data in the Enable Features section.

See Reference: General Setup.

Data Agents

With this release, we continue to improve Data Agents. You can now access the Data Agent using your Workday credentials without requesting additional permissions.

Data Agents Use ISU Users

Release: 2021-09-11

You can now access Data Agents without requesting the Adaptive Planning API Access domain when user sync is enabled.

See Log In to the Data Agent and Script Editor with Workday Credentials

Salesforce Integration

You can now upgrade your Salesforce Integration to use the latest version 51 Salesforce endpoint.

See Steps: Set Up Salesforce Data Sources.

Upgrade Salesforce Data Sources

Release: 2021-09-11

We add a new Upgrade to v51 menu in the Actions pane for Salesforce data sources that use version 32 and older.

Compare Table Structures

Release: 2021-09-11

To support the new Upgrade to v51 menu, we now enable you to compare new tables with existing table structures. When you change new structures, we now provide a report with these details:

- Schema change summary.
- Dependency check details of items using the changed structures.

Adaptive Planning - Miscellaneous Enhancements

User Administration Interface

Release: 2021-09-11

We enhance the user pages in the Administration section, providing faster navigation, search, and usability.

We now:

- Enable you to search for users by name so that it's faster to create users and export user permissions.
- Enable you to export permissions data for all users, instead of only the listed users.
- Use pagination when the list includes more than 25 users.
- Display an error when search returns no results.

We also rename the:

- Printable View button on the All Users page to Export User List.
- Email field on the Permission Sets pages to Login.

See Steps: Create, Edit, or Delete Users, Concept: Permission Sets.

Sync Workday Users to Adaptive Planning
Release: 2021-09-11

We continue to enhance the syncing of Workday users to Adaptive Planning. We now enable you to:

- Edit any mismatched users in Adaptive Planning after you first run and then re-run user sync.
- View the time zone alignment between Workday and Adaptive Planning after user sync.

See Sync Users with Adaptive Planning.

Drill into Transactions from Cube Standard Accounts
Release: 2021-09-11

We now provide the Drill into Transaction link when you launch Explore Cell from cube standard accounts. We also now provide the Drill into Transaction option when you right-click on cells of cube standard accounts.

See Concept: Drill Down and Drill Through.

Journal Entries Replace Reclassification Rules
Release: 2021-09-11

You can no longer enable reclassification rules for instances. If you currently use reclassification rules, you can continue using it, but we recommend that you use journal entries to manage reclassifications instead.

You can use journal entries to:

- Post reclassification entries as journal entries or as a journal entry subversion of the actuals version.
- Reclassify any portion of an account.
- Replace reclassifications rules and create automation using recurring journal entries.
- Retain the specific level for the reclassification.

See Create a Journal Entry.

Dimension Value Renamed to Dimension Value Code in Users Associations Import
Release: 2021-09-11

We rename the Dimension Value column in the Import User Associations template file to Dimension Value Code. This helps to clarify that the import remains backward compatible for template files that use Dimension Value as the column name.

Unicode White Space Characters Disallowed in Name or Short Name
Release: 2021-09-11

You can no longer enter Unicode white space characters in name and short name when using:

- Level, Dimension, and Attribute admin pages.
- `updateLevels`, `updateDimensions`, and `updateAttributes` for API v30.
- Excel import for Level/Dimension/Attribute structures.

A space character is allowed between words. Refer to https://docs.oracle.com/javase/7/docs/api/java/lang/Character.html#isWhitespace(char) for the complete list of Unicode white space characters.

See updateLevels, updateDimensions, updateAttributes, Create or Edit Level Dimensions or Attributes

Dimension and Attribute Values in Excel Structure Imports

Release: 2021-09-11

You can no longer enter a dimension value or attribute value in the same row as its dimension or attribute in Excel structure imports. A row in the template can't contain:

- Both the dimension and dimension value information.
- Both the dimension attribute and dimension attribute value information.

Enter dimension value and attribute value information in the rows below their dimension or attribute.

Download Web Reports from Main Navigation

Release: 2021-09-11

We enhance the downloading experience for web reports in Excel and PDF formats. We now open an Excel or PDF report from the main navigation menu in a new browser tab.

See Concept: Web Reports.

OfficeConnect User Setting for Multiple Tenants

Release: 2021-09-11

We deliver a new Connections option on the user settings page. When you select the option, we display a prompt on the login page that enables OfficeConnect users to select a tenant before they log in and authenticate.

Note: This only applies to users with single sign-on (SSO) where the identity provider automatically logs in the user.

See Sign in to OfficeConnect with Workday Credentials.

Add Notes After Changing Any Report Parameter Value

We expand collaboration capabilities for report users. After a user changes any parameter value on a report, we now enable you to add notes without moving the report back to an unsaved status.

See Add Report Notes and Add Line Notes to Reports.

OfficeConnect System Variable Label Change

Release: 2021-11-12

We rename the Book Name system variable label in OfficeConnect for Adaptive Planning to Workbook Name. This makes it easier to distinguish the system variable label from the Book dimension in OfficeConnect for Workday Financials.

See Reference: Report Label Types and Values.

OfficeConnect and EIP Login Page Change for License Agreement

Release: 2021-11-12

We deliver a new license term link that now also supports planning and analytics as well as financials customers. New OfficeConnect and Excel Interface for Planning (EIP) users can use the link to view license agreement terms.

Note: This change doesn't apply to existing customers.

Metadata Loader Column Mapping

We renamed the Column Mapping columns in the Level, Attribute, Association, and Dimension loaders to make mapping easier.

Renamed Columns in Column Mapping
Release: 2021-09-11

When you map columns in the Column Mapping tab for Level, Attribute, Association, and Dimension loaders:

- The Source Id Column becomes the Source Column.
- Level, Dimension, Association, and Attribute Display Name columns become Level, Dimension, Association, and Attribute Name rows.

Note: The Source Display Name column was removed from Level, Association, Attribute, and Dimension loaders to split Source Display Name into multiple rows.

See Create Planning Attribute Loaders, Create Planning Dimension Loaders, Create Planning Level Loaders.

Traditional Chinese Language Support

We expand our local language support by adding Traditional Chinese to Adaptive Planning.

Note: Note: For details, see the Language Translations feature in the System functional area on the What's New in Workday report.

Traditional Chinese Language Support
Release: 2021-09-11

We now support displaying all text in Traditional Chinese throughout Adaptive Planning.

Plan Publishing

We improve the plan publishing process to provide a better user experience. You can now include or exclude dimension values and general ledger accounts in your plan structure. We also enhance the performance of publishing high-volume headcount and financial plans by now segmenting them into periods during publish. We also now enable you to publish zero full-time equivalent (FTE), providing greater flexibility.

Select Dimensions to Include or Exclude
Release: 2021-09-11

You can now indicate the dimension values to include or exclude in your Workday Plan Structure.

See Concept: Publish Plans from Adaptive Planning.

Import Headcount Plan Web Service
Release: 2021-10-08

We update the Import Headcount Plan web service to now support rows with zero full-time equivalent (FTE) when you use FTE as a statistic type on your headcount plan template. This enables you to include rows with zero FTE when you publish headcount plans.

Note: Workday automatically uses the web service when you publish headcount plans.

Import Multiple Account Links

We update the import template so that you can add multiple source accounts to linked accounts, saving you time and effort.

Watch the video: 3m 10s

Account Import Template Supports Multi-Links
Release: 2021-09-11

We update the account import templates, enabling you to import link settings. The Linked Account column now supports more than one source account.

We also add new columns to support the link settings:

- Applied Dimension
- Applied Dimension Values
- Change Sign +/-

See Import and Export Accounts.

Plan Publishing by Period

We improve the performance of publishing large Headcount and Financial plans by segmenting them into periods during publish. This publishes the plan faster and enables more fine-grained plan troubleshooting.

Publish Plan by Period

When you publish a plan, the Publish History in Adaptive Planning now includes expandable and collapsible rows containing links for each period submitted to the Workday Process Monitor.

See Concept: Publish Plans from Adaptive Planning.

Request the Excel Interface for Planning Add-In

We now enable you to request the Excel Interface for Planning (EIP) add-in. You can use the add-in to streamline the planning process.

Access Excel Interface for Planning

Release: 2021-09-11

We now enable additional customers to request the Excel Interface for Planning (EIP) add-in.

If you haven't used this functionality within the past 4 months, you must open a provisioning case in the Workday Customer Center to enable it for your instance.

See Concept: Excel Interface for Planning.

Level, Dimension, and Attribute Codes for Display Names

With this release, you can now synchronize dimension hierarchies that contain duplicate labels. This provides a more seamless experience when loading metadata from Workday Core into Adaptive Planning.

Display names are not available for instances:

- Enabled for Excel Interface for Planning.
- That include a modeled sheet set up to define anomaly thresholds.

Code and Display Name for Dimension Values, Attribute Values, and Levels

Release: 2021-11-12

We add these new fields on Admin pages for dimensions, levels, and attributes:

- Code, which is a unique identifier that's required for each dimension value, attribute value, and level in Adaptive Planning.
- Display Name, which displays for each dimension value, attribute value, or level in Adaptive Planning

Note: We automatically populate the Name value in the:

- Code field for dimension values, attribute values, or levels that existed in Adaptive Planning prior to 2021-11-12.
- Display Name Field.

You can also edit the Code and Name fields on the Admin pages.

See Concept: Level, Dimension, and Attribute Codes for Display Names

Metadata APIs Include Code and ID
Release: 2021-11-12

We update these bulk APIs to now support code when you enable display names that all use ID as a key:

- updateAttributes
- updateDimensions
- updateLevels
- exportLevels
- exportDimensions
- exportDimensionMapping
- importDimensionMapping

We also update these data APIs to support code when you enable display name elements:

- eraseData
- exportConfigurableModelData
- exportData
- importConfigurableModeleData
- importStandardData
- importCubeData
- importTransactions

We also deliver a new displayNameEnabled property that you can enable for display names in these APIs. You must enable the displayNameEnabled property in each call.

See Concept: Level, Dimension, and Attribute Codes for Display Names

Configure Display Name
Release: 2021-11-12

We enable you to configure the format of the new Display Name field on the Admin pages for dimension values, attribute values, and levels. You can use 1 of these formats:

- Code
- [Code] Name
- Name
- Name [Code]

Note: When you change the format or a component of the display name, we re-sort the elements in Admin pages based on the new format or changed component, even when you've enabled the Keep Sorted option.

See Concept: Level, Dimension, and Attribute Codes for Display Names

Display Name Elements in Adaptive Planning Integration
Release: 2021-11-12

In Adaptive Planning Integration loaders for dimensions, attributes, and levels, you can now load metadata elements that use the same label. The loaders automatically use the value in the Code field as the unique identifier. You can select to automatically map levels, dimension, and attributes based on the Code field using the Planning Data Loader.

Note: For the dimension, level, and attribute loaders to run, you must map the Code field in your column mappings.

See Concept: Level, Dimension, and Attribute Codes for Display Names

Dimension Structure Excel Import
Release: 2021-11-12

We deliver these new columns in import templates for dimension structures:

- Dimension Short Name.
- Dimension Description.
- Display Name Format.
- Dimension Value Code.
- Dimension Value Name.
- Dimension Value Display Name.

Note: We strongly recommend that you download a new import template each time you import.

See Concept: Level, Dimension, and Attribute Codes for Display Names

Attribute Structure Excel Import
Release: 2021-11-12

With this update, we add these new columns in import templates for level attribute, account attribute, and dimension attribute structures:

- Attribute Description.
- Attribute Short Name.
- Attribute Value Code.
- Attribute Value Name.
- Display Name Format.

Note: We strongly recommend that you download a new import template each time you import.

See Concept: Level, Dimension, and Attribute Codes for Display Names

Level Structure Excel Import
Release: 2021-11-12

We deliver these new columns for level structures:

- Code.
- Description.
- Dimension Code.
- Dimension Name.
- Attribute Code.
- Attribute Name.

Note: We strongly recommend that you download a new import template each time you import.

See Concept: Level, Dimension, and Attribute Codes for Display Names

Code and Display Name Formula Support
Release: 2021-11-12

We now enable you to copy and paste the Code or Display Name value for levels, dimension values, and attribute values in these fields:

- Shared Formulas Menu
- General Ledger leaf account Specify Default Formula – Formula Assistant
- General Ledger leaf account Formula – Formula Assistant
- General Ledger leaf account Default Formula – Formula Assistant

- Consolidation Rules Formula Assistant

See Concept: Level, Dimension, and Attribute Codes for Display Names

Planning Data Source Support for Code
Release: 2021-11-12

We update the Planning Data Source with a new Include Codes check box to support custom, cube, and modeled sheet sources. We automatically select the new check box on new Planning Data Sources. You can deselect the check box for integrations that don't require code.

See Concept: Level, Dimension, and Attribute Codes for Display Names

Download Options for Sheets
Release: 2021-11-12

To support duplicate member names, we change the behavior of the Download button in the sheets toolbar.

On modeled sheets, we remove the Download button and instead deliver a new drop-down menu that contains these 2 options:

- Download, which opens an Excel file with new columns containing the codes for levels, dimension values, and attribute values. The codes enable you to import this spreadsheet.
- Printable View which opens an Excel file with columns containing your configurable display names for levels, dimension values, and attribute values. We also keep your current display options of the sheet intact with the printable view. You cannot import this spreadsheet.

On modeled sheets on dashboards, in the More menu:

- You can continue to use the Download option. We update the Excel file to now include the codes for levels, dimension values, and attribute values. This enables you to import the spreadsheet.
- We add the new Printable View option, enabling you to open an Excel file with the configurable display names for levels, dimension values, and attributes. This also keeps your current display options of the sheet intact. You can't import this spreadsheet.

Note: In cube and standard sheets, you can continue to use the Download button in the toolbar.

See Concept: Level, Dimension, and Attribute Codes for Display Names

Dimension Mapping Excel Import
Release: 2021-11-12

We update the dimension mapping import template to now use the dimension value code instead of the name.

Note: We strongly recommend that you download a new import template each time you import.

See Concept: Level, Dimension, and Attribute Codes for Display Names

Display Name in Dimension Mappings on Dashboards
Release: 2021-11-12

In dimension mappings on dashboards, we rename the Name label to Display Name. This ensures that we don't display duplicate values for levels and dimensions.

Also, we update filter results to now highlight any values that contain the filter query, instead of only an exact match.

See Concept: Level, Dimension, and Attribute Codes for Display Names

Download and Upload Mappings for Metadata Loaders

You can now download, view, and upload external system mappings for metadata loaders, enabling you to quickly resolve any mapping issues you might experience.

Download Mappings and Upload Mappings Links

Release: 2021-10-15

You can click Download Mappings and Upload Mappings links in the Actions pane for:

- Dimension Loaders
- Level Loaders
- Account Loaders
- Attribute Loaders

The new Download Mappings link enables you to download in XLSX file format.

The new Upload Mappings link enables you to upload 1 sheet of mappings in XLSX file format. When you upload mappings, we:

- Replace all of your existing mappings with the one you upload.
- Evaluate each row in your mappings for duplicates or missing elements in Adaptive Planning. Any errors automatically cancel the entire payload.

Note: If you upload more than 1 sheet of mappings, we only upload the first sheet.

Levels on Cube Sheet Data Imports

We improve the user interface of the Import Cube Sheet page to now only display levels associated with the cube sheet, making it faster and easier to import your data.

Hide Unavailable Levels on Import Data Page

Release: 2021-10-15

We now hide levels that aren't associated with the cube sheet on the Level Mapping section of the Import Data page, preventing you from importing rows using levels that aren't on your cube sheet.

Merged Cube Sheets

Release: 2021-11-12

With this release, we continue to enhance merged cube sheets functionality for improved usability.

We now automatically enable you to use the merged cube option for all tenants when you build new cube sheets. We no longer require you to submit a provisioning ticket.

See Concept: Merged Cube Sheets.

Adaptive Planning Support and Feedback

With this update, we provide access to the Workday Resource Center, which includes the Workday Community, Workday Customer Center, and Workday Learning Center. As part of our continued integration of Adaptive Planning with Workday, these changes are designed to help you get the most from Workday, while providing an exceptional customer experience and stronger security protocols.

See Reference: Contact Us

Watch the video: 2 min 38 s

Access to Workday Community

Release: 2022-02-11

We now provide all Adaptive Planning customers access to the Workday Community. The Community provides a centralized platform for resources, support, and engaging conversations on all Workday products, including Workday Adaptive Planning. The Community hosts:

- Brainstorms: Submitting feature enhancement suggestions to Workday product management.
- Product Innovation Experience events: Find information on new features, fixes, and content.
- Workday Adaptive Planning product roadmap: See what's coming up in future releases.

We enable you to request access to Community from the Community login page. Your designated Community Organization Administrator is responsible for approving requests.

Workday Customer Center Replaces Customer Support Portal and Contacts
Release: 2022-02-11

We replace the Customer Support Portal with the Workday Customer Center. We enable your Named Support Contact to access the Workday Customer Center when they click Support > Submit a Request from the nav menu of Adaptive Planning. Once your initial NSC has access to the Workday Customer Center, they can add additional NSCs and manage other roles through the Contacts Management functionality.

Only Named Support Contacts can sign in to the Workday Customer Center to create cases. If you think you should be an NSC and you don't have access to the Customer Center, request it from the Login page. Your existing NSC approves your request.

We also retire the existing case management tool, Support email addresses, and Support phone numbers.

Brainstorm Replaces Product Feedback
Release: 2022-02-11

Brainstorm in Community is the new space where you can provide product feedback and suggestions. We change the nav menu label and the Welcome page tile from Product Feedback to Product Suggestions. Both links take you to Brainstorm in Community.

We enable you to request access to Community from the Community login page. Your designated Community Organization Administrator is responsible for approving requests.

Community Replaces Customer Engagement
Release: 2022-02-11

We replace the Customer Engagement tile on the Welcome page with a new Community tile. This tile routes directly to the Workday Community login page.

We enable you to request access to Community from the Community login page. Your designated Community Organization Administrator is responsible for approving requests.

Adaptive Training Moves to Workday Learning Center
Release: 2022-02-11

We migrate all Adaptive Planning Training Center to the Workday Learning Center. We also migrate training record completions and create Workday Learning Center accounts for all users who have signed into the Adaptive Planning Training Center since November 1, 2019.

Your designated Training Coordinator manages training approvals and assignments for the rest of your team.

Torchbearers Platform Retires
Release: 2022-02-11

We retire all access to the Torchbearers discussion forums, challenge activities, and rewards redemptions.

Office Hours Replaces Customer Enablement
Release: 2022-02-11

We change how you contact the customer enablement team. We now provide Office Hours, which Named Support Contacts can purchase and schedule from the Workday Customer Center.

Related Information
Concepts
Community: Introducing Workday Adaptive Planning to the Workday Community
Community: Customer Support FAQ for Adaptive Planning
Community: Customer Training - Helpful Information and FAQ
Community: Office Hours

Prior Releases

2021R1 Release Notes

2021R1 Release Notes

2021R1 Feature Overview - General Availability Recorded Session

2021R1 Service Pack Releases

Release: 2021-06-11

- Removed Unused Dimension Values in Bulk

Release: 2021-05-14

- Add Formulas to Cube-Entered Accounts
- CCDS and CCL Column Order
- Change and Save Standard Sheet View
- Data Entry Overrides through Planning Data Loaders
- Drill Down Into Workday With Matrix Reports
- Import and Export Formula Overrides
- Linked Accounts
- Merged Cube Sheets Available in Production Instances
- NetSuite Embedded

Release: 2021-04-09

- Additional User Attributes for createUser and updateUser APIs
- Anomaly Thresholds Modeled Sheet CCDS Default Memory Limit
- Decimal Precision for Publishing Financial Plans
- Delete Associations
- Planning Association Loader Replace Mode
- Prediction Version Type
- Skip Unmapped Metadata in Planning Association Loader

Release: 2021-04-05

- Access Rules for All New Adaptive Planning Instances

Adaptive Planning Dashboard Charts

With this release, we continue to improve dashboard charts. You can now hide all data points with a value of zero or null in dashboard charts, enabling you to display all relevant data.

Suppress Zeros

Release: 2021-03-12

You can now suppress zeros to focus your visualizations on relevant data points when you break down your charts by dimension. This also suppresses null values.

We add a **Suppress Zeros** toggle for all the charts when you break down by dimension in **Appearance Settings > Breakdown**. This enables you to suppress zeros for:

- Crosstabs in **Data Settings > Columns**.
- Scorecards in **Appearance Settings > General**.

You can't use suppress zeros functionality:

- For geo maps.
- When you breakdown your charts by time.

See Reference: Data Breakdown

Adaptive Planning Miscellaneous Enhancements

Column Limit for Matrix Reports

Release: 2021-03-12

You can no longer include more than 16,384 columns in a matrix report.

Cutting and Pasting in Modeled Sheets

Release: 2021-03-12

We improve the performance of modeled sheets when you cut, copy, and paste data.

New Version Button Updates for Sales Planning

Release: 2021-03-12

For a more consistent user experience, we update the New Version button for the version prompt across all areas. When you create a new version, we rename the Baseline field to Copy from Version.

See Create Versions in Sales Planning.

Upgrade OfficeConnect and Excel Interface for Planning

Release: 2021-03-12

If you are using both OfficeConnect and Excel Interface for Planning, upgrade both add-ins to their latest versions for compatibility.

See Product Downloads.

CCDS Default Memory Limit

Release: 2021-04-09

We increase the default memory limit for CCDS from 100 MB to 800 MB and the CCDS default page size to 10000 rows

See Concept: Design

Adaptive Planning User Security

We continue to provide a more consistent user experience by improving user security for Adaptive Planning. Also, if you use user sync functionality, you can now enable proxy users to sign in to Adaptive Planning in non-Production tenants.

Proxy Users

Release: 2021-03-12

If you use SAML SSO with user sync, you can now configure proxy user access in non-Production tenants.

See Steps: Set Up Proxy User Access to Adaptive Planning

Create User Without Password

Release: 2021-03-12

If you previously enabled SAML SSO, we now enable you to create a Workday Adaptive Planning user without specifying a password, saving you time and effort.

Rename Adaptive Planning Role

Release: 2021-03-12

In the Adaptive Planning user interface, APIs, and documentation, we rename the term "Role" to "Permission Set" for consistency.

Additional User Attributes for createUser and updateUser APIs

Release: 2021-04-09

We deliver these new attributes that you can use in the createUser and updateUser APIs:

- alternateEmail, enabling you to add an alternate email, which we automatically select as the user's email in the User Details section. This eliminates the need to manually update the Email field.
- samlFedId, enabling you to include the SAML federation ID for the user for single sign-on.

See createUser and updateUser.

Anomaly Detection and Outlier Reporting

We continue to make improvements to intelligent planning to help you create more robust and accurate models. Anomaly detection and outlier reporting enable you to identify outliers in general ledger accounts on standard sheets. They also enable you to analyze comparisons between machine learning predictions and your plans and budgets.

Watch the video: 4m 45s

Self-Service Setup

Release: 2021-03-12

We now provide anomaly detection and outlier reporting to all Adaptive Planning instances enabling you to create more accurate plans with machine learning.

We also add a new Intelligent Planning section to Modeling, enabling you to generate the predictions after creating a special prediction version.

See Steps: Set Up Intelligent Planning.

Generate Predictions

Release: 2021-03-12

We provide a new ML Predictions page that you can access from a new Intelligent Planning section on the Model Management page. On the new page, we also add a new Generate Predictions button that you can click to generate and display prediction information, helping you validate your intelligent planning setup.

See Generate Intelligent Planning Predictions.

Anomalies in Cumulative Accounts

Release: 2021-03-12

We remove cumulative accounts from the prediction version so that they no longer show anomalies, improving the accuracy of the algorithm.

Anomaly Thresholds Modeled Sheet

Release: 2021-04-09

To provide greater flexibility, we now enable you to define anomaly thresholds in modeled sheets. You can define thresholds for the upper and lower bounds either globally or for each account, level, and version.

To use this functionality, you must:

- Name the modeled sheet AIML-THRESHOLD.
- Select only 1 leaf level.
- Use these columns: ad_level, ad_account, ad_version, upper, and lower.

See Define Anomaly Thresholds.

Prediction Version Type

Release: 2021-04-09

We now provide a new Prediction Versions plan version type, enabling you to use any name for the machine learning prediction version. Now, you no longer must use AIML-FORECAST as the name of your prediction version.

To support the new plan version type, we display a new drop-down when you click the Create New Plan Version button. In the drop-down, we display these options:

- Create plan version.
- Create prediction version.

Note: When you generate predictions, we:

- Enable you to copy the consolidation percentages and exchange rates from another plan version.
- Use the date you select in the Start of Plan setting as the start date for the prediction.

See Create Prediction Versions for Intelligent Planning.

Associate Users with Levels and Dimensions

With this release, we improve how you associate users to levels and dimensions, saving you time and manual effort. Also, you can now use associations when you configure dynamic access rules.

Watch the video: 4m 19s

Associations Menu Option

Release: 2021-03-12

We provide a new Associations page when you go to Administration > Users and Roles and click Associations. We display a table with level ownership and other associations listed as separate rows.

Also, you can now review an association by user or by the associated dimension by clicking the View Details option.

In the associations toolbar, we also provide new buttons to export associations and to import new or updated associations.

See Concept: Associations.

Level Ownership as an Association

Release: 2021-03-12

Now, level ownership is an association. This enables you see all level owners and their levels in 1 place. You can also now use the Association template, API, or loader to create or update level owners.

See Concept: Level Ownership.

Association Codes

Release: 2021-03-12

We now enable you to use association codes, which are unique to the associated dimension. You can add the codes to your import template.

You can also use the codes as a dynamic reference, instead of either levels or custom dimensions in the access rule template. This grants the user access to the levels or custom dimensions listed in the association for the user. You can then update the associations without having to update the access rules.

Note: We require an association code for additional level associations and custom dimension associations. You can't add association codes for level ownership. Instead, those rules contain level ownership associations.

See Concept: Associations.

Association Import Template

Release: 2021-03-12

We provide a new Associations Template that you can access from the toolbar, enabling you to import associations.

See Import Associations.

Integration Loaders

Release: 2021-03-12

We provide a new loader for level and dimension associations that enables you to indicate a user's levels and dimensions associations. This automates the process of assigning levels and dimensions to users, saving you time and effort. This also makes it easier to manage user access after user sync from Workday.

See Create Planning Association Loaders.

updateAssociations API

Release: 2021-03-12

You can now update users level associations and ownership, as well as dimension associations with a new updateAssociations API. This helps to reduce manual effort, minimize error, and simplify user association maintenance.

See updateAssociations.

Workday Assignable Role Report Fields

Release: 2021-03-12

We deliver these new report fields on the Plan Dimension business object (secured to the Public Reporting Items domain) that you can use in condition rules and custom reports:

- Adaptive Planning System Users for Assignable Role
- Assignable Role
- Assignable Role Reference ID

When you use these fields in custom reports, you can load the assignable roles for users into Adaptive Planning.

See Load Associations After User Sync.

Skip Unmapped Metadata in Planning Association Loader

Release: 2021-04-09

We update the Planning Association Loader to no longer return an error for unmapped metadata. Instead, the Planning Association Loader now skips unmapped metadata, displays a warning, and continues processing.

See Create Planning Association Loaders.

Planning Association Loader Replace Mode

Release: 2021-04-09

We now enable you to select these modes in the Planning Association Loader:

- Update, enabling you to only add users.
- Replace, enabling you to delete all of the users and replace them.

See Create Planning Association Loaders.

Delete Associations

Release: 2021-04-09

We provide a new Remove option in the import associations process, enabling you to delete associations using the Associations template.

See Import Associations.

Bulk Select Context Filters

Contains preview content available only to customers invited to test a new offering or capability. Do not share.

Release: 2021-03-12

You can now group and apply multiple perspective filters on your dashboards. Group Filter Selection on Dashboards saves time and enables you to quickly correct data intersection by avoiding a refresh after each filter selection.

1. Click the **Filter** icon on the perspective toolbar.
2. Select **Time**, **Level**, **Currency**, **Market Segment**, and **Country** from the **Filters** dialog and **Apply**. This will update the perspective filters and refresh your dashboard widgets.

The default values are the ones set in the perspective toolbar. Selecting **Reset to Default** will revert your changes to the default filter values.

Filters affect each other the same way they do in the perspective toolbar. Example: Dashboard update in response to level/attribute changes.

Your settings are saved and will persist till you apply different filters.

Calculated Accounts for Adaptive Planning

With 2021R1, we offer more flexibility for calculated accounts, enabling you to fine-tune account data for each version. You can set versions to use default formulas, override formulas, or data entry.

Also, you can now override the formulas of calculated accounts so that users can enter or import data for specific versions without affecting the calculations for other versions.

Watch the video: 4m 9s

Data Entry Override Setting

Release: 2021-03-12

In account settings, we provide a new *Data Entry* formula override setting. You can use the new setting to remove the calculations from the account, enabling you to either import data or enter data in sheets for specific versions without affecting locked versions.

You can use the new setting for:

- Calculated cube accounts.
- Custom accounts with formulas.
- General ledger accounts with master formulas.

See Change Account Formulas and Override Formulas and Concept: Account Formulas and Overrides.

Disable Formula Override Setting

Release: 2021-03-12

We add a new Disable Version-Specific Formula Setting check box in account settings, enabling you to quickly delete the override formulas for the account. This enables the account to use the default formula for all versions instead, including locked versions.

See Change Account Formulas and Override Formulas and Concept: Account Formulas and Overrides.

Copy All Override Formulas for Clone Versions

Release: 2021-03-12

In version settings, we deliver a new Copy All Override Formulas check box when you clone versions. This enables you to indicate if you want to copy all the overrides or only the default formulas.

See Create Plan Versions.

Rename Version Setting

Release: 2021-03-12

When you create new plan versions, we rename the Copy Formulas and Rules check box on the New Version Options section in the version settings to Copy Shared Formula and Rules. This makes it easier to differentiate the check box from the Copy All Override Formulas check box.

See Create Plan Versions.

Data Entry Overrides through Planning Data Loaders

Release: 2021-05-14

We now enable you to map and load data into calculated accounts with data entry override using Planning Data Loaders.

Note: You must import data to your calculated accounts in the version specified for data entry overrides. If not, the import fails.

See Create Planning Data Loaders

Add Formulas to Cube-Entered Accounts

Release: 2021-05-14

We update the cube account administrator page. You can now take these actions for cube-entered custom and general ledger accounts:

- Add formulas on the accounts.
- Create formula and data entry overrides on the accounts.

Note: You must first add the account to the cube sheet before adding the formula.

See Concept: Cube-Entered Accounts and Concept: Calculated Accounts.

CCDS and CCL Column Order

You can import data with Custom Cloud Data Sources (CCDS) or Custom Cloud Loader (CCL) scripts and retain your column order after changing column types.

CCDS API Changes

Release: 2021-05-14

You can now specify the Column Ids in the getRowset(columnIds) method.

- `getRowset(columnIds)` - Returns the Rowset object that rows are added to using your specified column order.

Example: `context.getRowset([ 'NAME', 'ID'])`

See Adaptive Planning Functions

CCL API Changes

Release: 2021-05-14

You can now specify the Column Ids in the `createTableReader`(columnIds) method.

- `context.createTableReader(columnIds)` - The ReadRow() method returns data in the order of specified column Ids when you input an array of column Ids as parameters in the createTableReader(columnIds) method.

Example: `context.createTableReader(['NAME', 'ID']);`

Change and Save Standard Sheet View

With this release, we enable you to save more view options in sheets. This eliminates the need to change your view each time you open a sheet.

Note: You must submit an account provisioning request to enable this functionality.

View by Account or Level in Minimized View

Release: 2021-05-14

For convenience, in the minimized view on dashboards, you can now select to view by either the account or level.

Save Changes in Sheets and Dashboards

Release: 2021-05-14

We now enable you to save your sheet when you switch between the account and levels views in:

- Standard sheets in the **Sheets** area.
- Maximized standard sheets on dashboards.
- Minimized standard sheets on dashboards.

In standard sheets, you can now save changes that you make to:

- A pinned account or level.
- Your **View By** mode.

On dashboards, when you select to view by account or level, we now automatically save your selection as your preferred view. For convenience, we persist your preferred view when you:

- Refresh or return to the page.
- Switch between the minimized and maximized views.

See Change Standard Sheet View.

Cube-Entered Accounts

We bring more flexibility to cube-entered accounts, enabling you to build cube sheets that better align with your business needs. You can build multi-dimension profit and loss sheets that fully leverage custom dimensions, attributes, and linked accounts.

Watch the video: 3m 25s

Reordered Cube-Entered Accounts

Release: 2021-03-12

We provide a new option in the cube sheet settings that enables you to incorporate general ledger and custom accounts into the cube account list. This provides you with more control over how the sheet displays all the accounts.

See Steps: Remove the Cube Root Account.

Dashboard View Settings for Adaptive Planning

We expand dashboard view settings to provide you and your users with more visibility into the data. You can now change the default level and time for perspectives, enabling you to share dashboards that open with the specified levels and time periods that you configure.

Default Level and Time

Release: 2021-03-12

You can now override the default level and time perspective context filters by adding a new **Override Default** option for level and time in the **Data Settings** section.

See Change Default Level and Time Perspective Filters.

Decimal Precision for Publishing Financial Plans

When you publish financial plans from Adaptive Planning, we now round the currency values up based on the decimal precision in Workday Financials. This streamlines the process, saving you time and effort.

Currency Evaluation Rounding

Release: 2021-04-09

If a currency value contains precision of more than 2 decimal places, we now round up the value when you publish from Adaptive Planning to Workday Financials. We round up to .10 for values of .05 or greater.

Note: We highly recommend that you set currency precision in Workday Adaptive Planning to match the precision in Workday Financials.

See Concept: Publish Plans from Adaptive Planning.

Derived Dimension Values on Modeled Sheet Rows

We continue to improve derived dimension values on modeled sheet rows, saving you time and effort. We make it easier to build and maintain mapping rules when you have a large level hierarchy. We also improve the dimension mapping on dashboards experience.

Watch the video: 5m 30s

Level Inheritance for Derived Dimensions

Release: 2021-03-12

We now automatically apply your derived dimension rules at a parent level to all child levels.

You can override inherited rules by creating dimension mapping rules at a child level with the same mapping dimension combination as the parent level. You can't update mappings for specific levels without also updating child levels.

Note: You must contact support if you require dimension mapping rules to only impact an individual level rather than all child levels.

See Concept: Derived Dimension Values.

Derived Dimensions on Dashboards

Release: 2021-03-12

When you edit dashboards, we now save the column size changes to dimension mapping tables on dashboards. We also update the perspective context attribute filters to now filter dimension mapping tables on dashboards.

See Create Dimension Mappings on Dashboards.

Drill Down Into Workday Sources from Cube Sheets

You can now drill down into Workday actuals data from Adaptive Planning cube sheets, providing you with more visibility into your data.

Watch the video: 2m 52s

Drill Through Option in Cube Sheet Cells

Release; 2021-03-12

In Adaptive Planning, we deliver a new Drill Through option in cube sheet cells on the:

- Cell explorer.
- Context menu.

When you click the new option, we direct you to Workday so that you can view a summary of the underlying journal entries, enabling you to drill down into the data. We use the parameters from the cube intersection to generate the report in Workday.

See Drill Down and Drill Through.

Drill Down Into Workday With Matrix Reports

With this release, we continue to enhance the ability to drill into Workday using matrix reports. This improves usability by providing functionality more similar to sheets.

Drill Down Using Dimensions

Release: 2021-05-14

We now enable you to drill down into Workday from matrix reports with dimension filters. You can automatically ignore the root dimension when you drill down into Workday.

When you filter the report for all or top of the dimension, we ignore the dimension filter. When you filter the report for a specific dimension, we pass the dimension filter.

See Drill Down and Drill Through.

Erase Data on Planning Data Loader

The Limited Availability program for Erase Data remains at capacity, and continues until further notice. We won't be able to enable this for additional customers. We expect Erase Data to become generally available in an upcoming release.

With Workday 2021R1, we continue to enhance the Erase Data functionality of the Planning Data Loader. You can now erase plan or actuals data independent of the data being loaded. You can also choose to erase data for specific time periods, versions, levels or accounts.

Prerequisites

Required Permissions: **Import Capabilities > Erase Actuals**. Erasing actuals is a superuser permission that enables erasing actuals or plan data across Adaptive Planning, including in locked levels. **Erase Actuals** overrides Access Rules and level ownership restrictions. **Watch the video:** 3m 17s

Define Dataset

Release: 2021-04-09

We add an **Erase Settings** tab on the Planning Data Loader. You can now select a version parameter, period parameter, account, and level to erase data and optionally include cell notes in the Erase Settings tab. You can also link your account, period, and version parameters in the Erase Settings tab to the Data Source Settings tab of your planning data loader.

Also, we remove the Erase Actuals section from the **Data Source Settings** tab. Instead, we add all erase configurations in the **Erase Settings** tab.

To erase data with the Planning Data Loader:

1. Select your loader from the **Component Library.**
2. Navigate to the **Erase Settings** tab.
3. Select the **Enable Data Erase** check box to erase data.
4. Select **Edit Parameters** in the **Actions** pane and create **Version** and **Period** parameters. You can also to choose to use the **Version** or **Period** parameters specified in the **Data Source Settings** tab.
5. Select the accounts you want to erase data from. You can include **All GL Accounts, All Custom Accounts, Cube Accounts on sheet** or create a new account parameter to erase specific accounts. You can also select a combination of all the available account options.
6. Specify levels for erasing data. You can select all levels or or create a new level parameter for specific levels.
7. Run the loader manually using **Erase Manually** in the **Actions** pane or schedule the loader to run as a part of a task. If there is more than one planning loader within a task, then each of the erase options are available for each included loader. The options are tagged with the name of the loader to help identify the source of the erase option.

Erase Manually

Release: 2021-03-12

We add a new **Erase Manually** option in the **Actions** section on the Planning Data Loader, enabling you to erase data without running the loader.

Explore Cell Details

We update the Explore Cell functionality to provide you with more relevant data as you analyze your plans.

View Splits and Drill into Transactions

Release: 2021-03-12

For instances with access rules, we now enable you to view supporting details when you access the Explore Cell window from:

- Charts in Dashboards
- OfficeConnect
- Reports

In the Explore Cell window, we now provide:

- A Drill into Transaction link (secured to the Access Transaction permission), which you can only use in Adaptive Planning instances with the transactions module.
- Splits in standard accounts.

Example: You can split data in the Expense account by vendor. If you have access to only 1 vendor, when you launch the Explore Cell window, you can now see only the split data entered for the vendor you have access to. Also, if the data has associated transactions, you can click the Drill into Transaction link to view supporting data that you have access to.

See Drill Down and Drill Through.

External Systems in Adaptive Planning Integration

We improve External Systems in Adaptive Planning Integration. You can now reorder tuple concatenations for Workday and NetSuite external systems, making it faster and easier to configure tuples that match how your reports deliver data.

Reorder Tuples in External Systems

Release: 2021-03-12

You no longer need to alphabetically order tuple concatenations for accounts, levels, and dimensions. Instead, we now enable you to reorder the columns to match the configurations of your Workday or NetSuite data sources.

Note: If you reorder concatenations, the new order must match the configurations of your Workday or NetSuite data sources.

See Set Up a NetSuite External System for Drill Through, Set Up Workday External Systems for Adaptive Planning.

Import and Export Formula Overrides

To save you time and manual effort, we now enable you to mass import and export formula overrides for calculated accounts in the **Modeling** area.

Import Formula Overrides

Release: 2021-05-14

We update the **Import** button in the toolbar on the admin pages for:

- Cube accounts.
- Custom accounts.
- General ledger accounts.
- Metric accounts.

- Modeled accounts.

When you select the button, we now display a drop-down list that contains:

- A new *Import Override Formulas* option, enabling you to mass update and append formula overrides.
- The *Import Account Structure* option.

We also deliver a new **Override Formula Import** template, which you can download when you import formula overrides.

See Import and Export Accounts.

Export Formula Overrides

Release: 2021-05-14

We update the **Generate Printable View** button in the toolbar on the admin pages for:

- Cube accounts.
- Custom accounts.
- General ledger accounts.
- Metric accounts.
- Modeled accounts.

When you select the button, we now display a drop-down list that contains:

- A new *Export Override Formulas* option, enabling you to download all formula overrides so that you can mass review and import changes.
- The *Export Account Structure* option in the new drop-down list.

See Import and Export Accounts.

Import Cube and Modeled Accounts

With this release, you can now import and update cube and modeled accounts, saving you time and manual effort.

Watch the video: 4m 30s

Import Account Structure

Release: 2021-03-12

We deliver a new **Import account structure** button in the cube and modeled sheet builders, enabling you to:

- Append cube and modeled accounts.
- Download a template file.
- Choose a file to upload.
- Update cube and modeled accounts.

See Import and Export Accounts.

Korean Language Support

We expand our local language support by adding Korean to Adaptive Planning.

Korean Language Support

Release: 2021-03-12

We now support displaying all text in Korean throughout:

- Planning

- Dashboards
- Knowledge Center

To enable this functionality, you must update your browser language to Korean.

See Technology Requirements.

Linked Accounts

With this release, we update linked accounts to provide greater flexibility and to support cube sheets for multi-dimensional profit and loss (P&L).

Watch the video: 6m 48s

Note: We only provide these new capabilities in the account administration pages of Modeling. We do not update related APIs, spreadsheet imports, or the import templates.

Link to Multiple Source Accounts

Release: 2021-05-14

You can now add multiple source accounts to linked accounts. This enables you to combine data gathered from multiple sheets, simplifying your account hierarchies.

To support adding multiple source accounts, we remove the **Links To** prompts in the **Account Details** section. Instead, we deliver a new field that enables you to easily maintain a list of source accounts.

Also, we now enable you to:

- Add or change a filter for a source account when you add a new link or when you select a source account in the new field.
- View link filters for a source account when you select a source account in the new field.

See:

- Steps: Link Modeled or Cube Sheet Data to Another Account.
- Example: Multi-Source Linked Accounts with Applied Dimensions.

Links to multiple source accounts are not supported on NetSuite Basic (OEM) enabled instances.

Flip the Sign of Source Data

Release: 2021-05-14

On linked accounts, we add a new **Change Sign +/-** check box for linked account sources in the **Account Details** section, enabling you to change between credits and debits for the destination account.

You can use the **Change Signs +/-** check box when you:

- Add a new source account.
- Select the account in the new Links To field.

Example: You plan for an accumulated depreciation account as a positive value in a modeled sheet. In the general ledger account that you link to the modeled account, you can use the Change Signs +/- check box to pull the modeled sheet data into the general ledger account as a negative.

See Steps: Link Modeled or Cube Sheet Data to Another Account.

Cube Entered Account Links

Release: 2021-05-14

We now enable you to add linked general ledger and custom accounts to cube sheets. In the settings for the general ledger and custom accounts, you can now select both of these options:

- *Cube* for the **Data Entry Sheet Type** setting.

- *Link* for the **Type** setting.

Also, you can now use the *Link* type for general ledger and custom accounts that you previously added to cube sheets. This enables you to change general ledger or custom accounts into link accounts in the cube sheet account settings.

We also automatically update your cube sheet account settings with the same settings you configure for linked accounts, enabling you to:

- Add a dimension tag.
- Create the links to source accounts.
- Filter the links by dimensions.

See:

- Concept: Cube-Entered Accounts
- Reference: Cube-Entered Account Settings

Apply Dimension Values to Linked Accounts

Release: 2021-05-14

Workday now enables you to add a dimension value to a linked account and apply that value to the linked data. You can select the dimension value for a linked account in the Account Details section. This increases flexibility by enabling you to apply dimensionality to uncategorized linked data.

See:

- Steps: Link Modeled or Cube Sheet Data to Another Account.
- Example: Multi-Source Linked Accounts with Applied Dimensions.

Maintain and Calculate Access Rules

We continue to improve access rule functionality. You can now use account and dimension attributes to create dynamic access rules, making it easier to manage your access rules. We also provide a new tool to calculate user access based on existing rules.

Watch the video: 3m 44s

Use Attributes for Access Rules

Release: 2021-03-12

With this update, we rename the **Add Dimensions** button in the access rule toolbar to **Add**.

When you click the button, we update the popup window to now include attributes under their dimensions, enabling you to include attributes in the access rules. You can use attributes to grant access only to the values tagged with attributes.

This enables you to then update attribute tagging without having to update the access rules.

See Create Dynamic Access Rules.

User Access Calculator

Release: 2021-03-12

We deliver a new **User Access Calculator** page that you can access from the **Users and Roles** section on the **Administration** page. This enables you to select a user and then calculate the user's access, making it easier to audit, troubleshoot, and understand the affects of access rules on each user.

On the new page, we display a new:

- **Single Coordinate** option, enabling you to check the user's access to a specific intersection.

- **Single Dimension** option, enabling you to see if the user has access to the specific dimension at some intersections.

See Calculate the Access of Users.

Access Rules for All New Adaptive Planning Instances

Release: 2021-04-05

We update the access rule security structure for all new instances of Adaptive Planning for finance, sales, and workforce planning.

Now, when you create a new model, we provide you with at least:

- 1 user: admin@instancecode.com. We automatically assign the user ownership of all available levels.
- 1 permission set: **Full Seat**, which comes with most of the available permissions. We automatically assign the permission set to the admin user.
- 1 user group: **Level Owners**.
- 2 access rules: 1 rule grants the **Level Owners** with group access to all owned levels. The other rule grants the admin user with access to all data in the model.

You can add more users to the group to give them access to all their owned levels, or you can create groups and rules for other users.

See Access Rule Security, Create Access Rules and Concept: Access Rules.

Maintain Dimension and Attribute Values

We make it easier to maintain custom dimensions and dimension values, improving the user experience.

Add Dimension and Attribute Value Options in Cube Sheet Builder

Release: 2021-03-12

We add a new cube sheet setting for dimensions and attributes, enabling you control how newly added dimension and attribute values affect the cube sheet.

For each dimension and attribute on the cube sheet, you can choose when the cube sheet treats newly added dimension and attribute values:

- *Unavailable in sheet*
- *Immediately available in sheet*
- *Only available when the parent's available in sheet*

See Reference: Column Properties for Cube Sheets.

Remove Unused Dimension Values in Bulk

Release: 2021-06-11

You can now select a new Remove option when you import a dimension structure in the Dimension Admin page. The Remove option only deletes unused dimension values in your import file. You must contact support to enable the Remove option.

Note: You can't remove a parent dimension value that currently has a child dimension value in use.

See Import Attributes, Custom Dimensions, and Dimension Mappings.

Merged Cube Sheets

Important: We revert this functionality from production on 2021-05-28. We plan to redeliver it in a future update. If you already enabled this feature, you can continue using it.

With this release, we enable you to merge up to 3 modeled or cube sheets, saving you time and manual effort. When you merge the sheets, we automatically initiate cube calculations based on the presence information for the source sheet.

Watch the video: 5m 5s

Create Merged Cube Sheets

Release: 2021-03-12

Now, when you create cube sheets, we provide a new **Create as Merged Cube** check box.

Also, in the **Settings** tab on the sheet properties, we now display selection boxes for source sheets, enabling you to choose from available modeled sheets and cube sheets. You can choose up to 3 sheets.

See:

- Concept: Merged Cube Sheets
- Steps: Build Cube and Merged Cube Sheets.
- Example Steps: Build a Merged Cube Sheet for Revenue by Product and Customer

Merged Cube Sheet Dimensions

Release: 2021-03-12

We now filter the available custom dimensions to include only those already added to the source sheets. We also add the attributes of the available custom dimensions.

We automatically add any common dimensions to the canvas. Example: When all sheets contain the same dimension, we add that dimension to the canvas as a required dimension.

See:

- Concept: Merged Cube Sheets
- Steps: Build Cube and Merged Cube Sheets
- Example Steps: Build a Merged Cube Sheet for Revenue by Product and Customer

Merged Cube Sheet Accounts

Release: 2021-03-12

You can add these accounts to merged cube sheets:

- Cube calculated. You must select at least 1.
- Cube metric.
- Cube account groups.

The formulas of cube calculated accounts in a merged cube sheet must no longer evaluate to zero when the other accounts of the cube are zero. Instead, the data presence in the source sheets determines the intersections for the calculations.

See:

- Concept: Merged Cube Sheets
- Steps: Build Cube and Merged Cube Sheets
- Example Steps: Build a Merged Cube Sheet for Revenue by Product and Customer

Available in Production Instances

Release: 2021-05-14

You can now request to enable merged cube sheets in your production instances.

NetSuite 2020.1 Web Services

NetSuite 2020.1 Web Services Support

Release: 2021-03-12

We add a new **Upgrade to 2020.1** link in the **Actions** pane, and remove the Upgrade to 2018.1 link. This enables you to select an existing token based credential from the **Components** library or create a new token based credential during the upgrade process. This update helps enforce Token Based Authentication (TBA) for all NetSuite users, maintaining our Built For NetSuite (BFN) certification.

This update is not automatic for existing NetSuite data sources. You must manually upgrade your existing NetSuite Data Sources to 2020.1.

You must use a web service version that is less than 3 years old to ensure Workday and NetSuite are able to provide optimal support.

Use the HMAC-SHA256 signature with NetSuite 2021.2

Release: 2021-03-12

With NetSuite 2021.2, any integrations that use the Token-based Authentication (TBA) feature with HMAC-SHA1 as a signature method will stop working. With the Workday 2021 R1, we now support the HMAC-SHA256 signature for Token Based Authentication.

Ensure you use the latest version of the NetSuite Data Source (NetSuite 2020.1).This applies to all integrations you create, as well as integrations from the third-party solution providers.

NetSuite targets its 2021.2 release upgrade between August and October of 2021. If you use any integrations provided by a third party, inform the third party that the HMAC-SHA1 will no longer be supported as a signature method for TBA in NetSuite. The third party must provide you with an updated solution before the NetSuite 2021.2 release.

Upcoming Changes for Improved User Experience

We will enhance the Netsuite-Workday Adaptive Planning user experience in an upcoming release by opening the planning application in a new browser tab, so users can take advantage of the full-browser experience.

Note: Your browser pop-up blocker may prevent this page from loading. Enable pop-ups for this page and try again.If a new tab does not open, try re-launching Workday Adaptive Planning

NetSuite Embedded

Improved User Experience

Release Date: 2021-05-14

We enhance the Netsuite-Workday Adaptive Planning user experience when using the NetSuite Financial Planning tab, by opening the planning application in a new browser tab. This allows users to take advantage of the full-browser experience.

Note: Your browser pop-up blocker may prevent this page from loading. Enable pop-ups for this page and try again. If a new tab does not open, try re-launching Workday Adaptive Planning

OfficeConnect Ad Hoc Analysis

With this release, we improve OfficeConnect ad hoc analysis functionality. We enable users to quickly analyze reporting data by viewing the details using different expansion options. Also, users can apply and expand custom dimensions and attributes in reports.

Watch the video: 4m 20s

Apply and Expand Custom Dimensions and Attributes

Release: 2021-03-12

You can now apply and expand all parent custom dimensions and attributes.

See Steps: Explore Reports Using Ad Hoc Analysis.

Select the Direction for Expanding Parent Elements

Release: 2021-03-12

We now enable you to take these actions on parent elements for all reports or a single report:

- Expand columns to the left or right of the parent.
- Expand rows above or below the parent.

See Steps: Explore Reports Using Ad Hoc Analysis.

Expand All or Expand to Leaf Level

Release: 2021-03-12

You can now expand all parent elements including all descendants. We also enable you to expand all parent elements to the leaf level only. This makes it easier to access the rows where you need to enter data.

See Steps: Explore Reports Using Ad Hoc Analysis.

Focus on Parts of an Expansion

Release: 2021-03-12

We now enable you to focus on specific rows or columns of an expansion by hiding the other rows or columns. You can select specific rows or columns that are part of an expansion and then select the:

- **Keep Only** option to show only the selection and remove other parts of the expansion.
- **Remove Only** option to remove the selection from the expansion.

Note: When you use either option, we shift the data so that the remaining rows or columns are no longer an expansion.

See Steps: Explore Reports Using Ad Hoc Analysis.

Planning Data Source

We update the Planning data source to save you time and effort. We now enable you to add new dimension and version filters, access local parameters during run time for loaders and tasks, and specify the external version values to be used at runtime while importing data. Also, you can use the data source to automatically authorize the current user.

Include Roll up Data

Release: 2021-03-12

You can now include account and level rollups for custom and cube sheets source in **Manage Sources > Settings** by selecting:

- **Include Account Rollups**
- **Include Level Rollups**

Account rollups are enabled by default for any preexisting or new Planning Data Sources. Level rollups are disabled by default.

See Set Up Adaptive Planning as a Data Source.

Additional Filters

Release: 2021-03-12

You can now add an optional dimension parameter to your Dimension source using the **Manage Sources** in **Actions** section.

When you select the dimension filter parameter, the import dimension data only returns the filtered dimensions based on the dimension filter. You can:

- Only select the External Dimension parameter if your Planning credential is connected to an external instance.
- Select the Shared Dimension parameter if your Planning credential is connected to a self instance.

When you select the version filter parameter, the import dimension data only returns the filtered dimensions based on the version filter. You can:

- Only select the External Version parameter if your Planning credential is connected to external instance.
- Select the Shared Actuals Version parameter or shared Plan Version if your Planning credential is connected to self instance.

Note: We don't automatically select any dimension parameters.

See Set Up Adaptive Planning as a Data Source.

Shared Parameters

Release: 2021-03-12

You can now select shared parameters when your planning credential is connected to your local instance. This enables you to reuse the available shared parameters for other data sources.

See Set Up Adaptive Planning as a Data Source.

Automatically Authorize Users

Release: 2021-03-12

You can now enable Workday to authorize the current user for the Planning Data Source credential, saving them time by no longer requiring them to enter their information twice.

Note: To enable this functionality, you must select the **Use Currently Logged in User** option in the Adaptive credential setup.

See Set Up Adaptive Planning as a Data Source.

Runtime Parameters

Release: 2021-03-12

You can now change the External Version parameter at runtime to return filtered data and run Import Data with the updated filter value.

Example: When you set the Version filter for a Sheet source to be an External Version parameter and run Import Data, we populate the Plan Version drop down list with versions that were available during the external version configuration.

See Set Up Adaptive Planning as a Data Source.

Import Data

Release: 2021-03-12

We update the Planning data source to no longer import the structure when you run the Import Data integration. If you change the structure, we return an error when you run the Import Data integration.

To update the structure, you must run the Import Structure integration before you run the Import Data integration.

See Set Up Adaptive Planning as a Data Source.

Planning Data Source Stratum

You can now aggregate transactional data by time stratum in your Planning Data Source.

Aggregate Data by Stratum

Release: 2021-03-12

You can now configure time stratum aggregation for cube sheets or custom sources. Select **Aggregation Stratum** in **Manage Sources > Settings** from your current instance and aggregate data by any time stratum available in the current instance. If you don't select a stratum, your data source will behave the same as before.

If your selected stratum is no longer available or your Planning time strata changed, an error occurs during run time when you select **Import Data** or **Run Manually** from the loader or as a part of a task.

Redesign for Sheets Overview and Explore Cell

Contains preview content available only to customers invited to test a new offering or capability. Do not share.

Sheets Overview

Release: 2021-03-12

We've made some changes to the **Sheets Overview**.

Navigation Section	Access either level-assigned sheets or user-assigned sheets from the new navigation section on the left. Click the arrow to collapse or expand the section.
Search and Sort	• Type keywords in the new **Search** field to find sheets. • Click the **Name** header to sort the list of sheets in descending alphabetical order. Click again to switch to ascending, and click again to revert to the order set by your admin.
Level Drop-Down	It looks a bit different, but works the same. If you use elimination levels, you'll notice the new elimination level icon.
Search Cell Notes and Audit Trail	Click the **More** icon from the toolbar on the right to select • *Search Cell Notes* • *Search Audit Trail*
Change Workflow Status	For models with Workflow and users with Workflow permissions we provide a new interface for Workflow status updates:

	• For level-assigned sheets, click the status from the toolbar. The **Level Workflow Status** section opens on the right. • For user-assigned sheets, click the status next to sheet name. The **Sheet Workflow Status** opens on the right. • For user-assigned sheets, you can also sort by Workflow status: click the **Workflow Status** header. From the **Level** and **Sheet Workflow Status** section, you can: • See who last updated the status. • Add a note. • Change the status (if you have the permissions).

Explore Cell

Release: 2021-03-12

We've rearranged the information to make it easier to find the details.

Upper Left	• The cell value. • Links to the sheets that show the value. • Links to audit trail and drill capabilities.
Upper Right	Details about: • Account • Levels • Time • Arrows to click to the previous and next time period
Bottom Half	The bottom half contains the contributing details, including source accounts, formulas, and sources of contributing values.

Required Columns on Modeled Sheets

We now enable you to require specific columns on modeled sheets, helping to ensure that the plans contain all the data you need to accurately budget and forecast.

Note: To enable required dimension column you must submit an Account provisioning ticket.

Required Column Check Box

Release: 2021-03-12

We provide a new Required Column check box in the General Properties section of custom dimension columns when you maintain modeled sheets, enabling you to configure which columns are required.

Also, when you use the sheet in the Sheets section, we highlight rows containing an empty required field. For Excel Interface for Planning, we don't:

- Highlight rows that contain an empty required field.
- Require columns when you add new rows.

We also don't require columns for manual imports and integrations.

See Reference: Modeled Sheet Column Properties.

Required Modeled Sheet Columns in APIs

Release: 2021-03-12

A new requiredColumn attribute for Dimension tags indicates when a modeled sheet column requires a dimension value selection before users can save the sheet. This attribute becomes available in API v27 for:

- importModeledSheet
- exportModeledSheet

See importModeledSheet, exportModeledSheet.

Retain Metadata Order in Adaptive Planning Integration

When you import elements using integrations, we now enable you to retain the order of the metadata in Adaptive Planning. This improves the user experience when managing accounts, attributes, dimensions, and levels.

Maintain Existing Order in Loaders

Release: 03-12-2021

We now enable you to maintain the sort order of Adaptive Planning when you use the Planning Account and Level Loaders. We add a new Maintain Existing Order in Planning check box on the Data Source Settings tab in the loaders.

We automatically select the new check box for new loaders. To preserve the behavior of any existing account and level loaders, we recommend that you don't select the new check box.

See Create Planning Level Loaders, Create Planning Account Loaders.

Retain Existing Order in APIs

Release: 03-12-2021

We deliver a new retainExistingOrder attribute for these metadata bulk APIs:

- updateAccounts
- updateDimensions
- updateAttributes
- updateLevels

This enables you to import metadata elements without altering how Adaptive Planning already sorts the order.

See updateAccounts, updateDimensions, updateAttributes, updateLevels.

Sheets on Dashboard

We improve usability of sheets on dashboards by delivering a more consistent user experience and enabling quicker access to data.

Maximize Sheets on Dashboard

Release: 2021-03-12

You can now use the perspective toolbar when you maximize sheets on dashboards, persisting all your context filter selections.

In the maximized mode, filters common to both perspective toolbar and the sheet are disabled in the sheet and in the **Change Dimensions** section. You can change these filters only in the perspective toolbar.

See Reference: Differences in Sheets on Dashboards When Optimize Sheet Is Enabled.

Workday Data Source for Adaptive Planning

Import Multi Instance Objects

Release: 2021-03-12

When you select reports from Workday in the Workday Data Source, you can now update multi-instance field behavior to flatten and unpivot the data for consumption by Adaptive Planning.

We recommend that you do this for reports that contain 1 multi-instance object. For multiple multi-instance objects you must create Extract Single Instance calculations.

See Select Workday Reports for Workday Data Sources in Adaptive Planing.

Workforce Planning Actions

We continue to streamline your ability to create positions in HCM from an approved workforce action plan in Adaptive Planning. Now, we enable you to immediately create positions in HCM when you publish your workforce action plan, reducing the amount of manual effort. You can also publish directly from the filtered rows of a modeled sheet in Adaptive Planning so that you can view your plan as you publish.

See Steps: Publish Workforce Planning Actions from Adaptive Planning.

Publish Workforce Actions

Release: 2021-03-12

When you publish a workforce plan, we now enable you to either:

- Manually review and edit the proposed new positions in HCM.
- Skip manual review.

To skip manual review, you can initiate the Create Position business process from a workforce plan by selecting the **Expedite Workforce Action** option when you publish the plan.

We also add a new **Publish** action on the modeled sheet that you can use to view which modeled rows you are about to publish.

Note: You can configure **Workforce Action** mapping in the modeled sheet setup.

See Publish Workforce Planning Actions from Adaptive Planning.

Review Workforce Planning Actions Task

Release: 2021-03-12

We deliver a new Review Workforce Planning Actions task (secured to the Process: Workforce Action Plan domain) that you can use to enter the information needed to create the planned positions in your organizations.

Note: To use the new task, you must also be part of a security group that's assigned to the initiating action on the business process security policy for the Create Position business process.

See Review Workforce Planning Actions.

Workforce Planning Action Event Business Process

Release: 2021-03-12

We add a new Workforce Planning Action Event business process (secured to the Adaptive Planning for Headcount Plans functional area).

We also deliver a new Import Workforce Planning Actions web service (secured to the Adaptive Planning for Headcount Plans functional area) as an initiating action on the new business process. When you publish workforce planning action plans from a modeled sheet in Adaptive Planning, we automatically initiate the new web service.

Note: You must set up the business process using the Create Business Process Definition (Default Definition) task before you can use it. If you plan to publish using the **Skip Review** button, we recommend that you set up this business process with a routing rule condition for processes initiated from Adaptive Planning.

See Steps: Set Up Security for Adaptive Planning.

View Workforce Planning Actions Report

Release: 2021-03-12

We deliver a new View Workforce Planning Actions report (secured to the Reports: Workforce Action Plan domain), enabling you to review the workforce planning actions that you publish from your modeled sheet in Adaptive Planning for your organizations. You can access the report for each publish from a publish history link in Adaptive Planning.

See Steps: Publish Workforce Planning Actions from Adaptive Planning.

Plan Dimensions/Hierarchies Report

Release: 2021-03-12

On the Plan Dimensions/Hierarchies Report, we add these new options in the Non Worktag Plan Dimension Type prompt category on the Dimension Type prompt that you can use to load the dimensions for your workforce action plans:

- Difficulty to Fill
- Reason
- Worker Sub-Type

See Steps: Publish Workforce Planning Actions from Adaptive Planning.

Workforce Planning Action Event Report Field

Release: 2021-03-12

We deliver a new Workforce Planning Action Event report field on a new Workforce Action Event business object (secured to the Public Reporting Items domain) that you can use in condition rules and custom reports to identify which positions were created from a published workforce action plan.

Reports: Headcount Plan (Adaptive Planning) Domain

Release: 2021-03-12

With this update, we deliver a new Reports: Headcount Plan (Adaptive Planning) domain that you can use to secure access to reports about Adaptive Planning headcount plans. This provides a more secure way to grant access to headcount plan reports and workforce planning reports.

Note: Workday automatically converts the security groups on the Reports: Workforce Action Plan domain and adds them on the new Reports: Headcount Plan (Adaptive Planning) domain.

See Steps: Set Up Security for Adaptive Planning.

Headcount Planning (Adaptive Planning) Subreports

Release: 2021-03-12

For consistency, we now secure these reports to the new Reports: Headcount Plan (Adaptive Planning) domain, instead of to the Reports: Workforce Action Plan domain:

- Plan Report Sub Report for Cost of Workforce
- Plan Report Sub Report for FTE Cost
- Plan Report Sub Report for HC Cost
- Plan Report Sub Report for HCM and Planning

See Steps: Set Up Security for Adaptive Planning.

Headcount Plan Lines for Organization Report Data Source Filter

Release: 2021-03-12

For consistency, we now secure the Headcount Plan Lines for Organization report data source filter to the new Reports: Headcount Plan (Adaptive Planning) domain, instead of to the Reports: Workforce Action Plan domain.

See Steps: Set Up Security for Adaptive Planning.

Plan Lines for Financial Reporting Report Data Source

Release: 2021-03-12

For consistency, we now secure the Plan Lines for Financial Reporting report data source to the new Reports: Headcount Plan (Adaptive Planning) domain in addition to its existing domain.

See Steps: Set Up Security for Adaptive Planning.

Approved New Positions Report

Release: 2021-03-12

In preparation for its retirement in a future update, we append (Do Not Use) to the name of the Approved New Positions report.

2020R2 Release Notes

2020R2 Release Notes

2020R2 Feature Overview - General Availability Recorded Session

Introducing Intelligent Planning

With this release, we introduce intelligent planning for anomaly detection and outlier reporting. This enables you to quickly identify outliers by general ledger accounts in standard sheets. This also enables you to compare the machine learning predictions against your plans and budgets to analyze and create more robust and accurate models.

Watch the video: 6m 19s

See Steps: Set Up Intelligent Planning and FAQ: Intelligent Planning.

Machine Learning Prediction Version

Release: 2020-09-11

You can now enable machine learning for anomaly detection and outlier reporting.

Note: To enable this functionality, you must:

- Create a forecast version with the name AIML-FORECAST, which holds the predictive values, and then
- Submit a support ticket to request anomaly detection and outlier reporting.

See Create Prediction Versions for Intelligent Planning.

Anomaly Detection in Sheets

Release: 2020-09-11

To enable you to detect outliers and unexpected data, we deliver a new Detect Anomalies button on standard sheets. When you use the button, we compare this data against the predictions:

- General ledger and custom account data.
- Standard sheets.
- Plan versions.
- Web sheets, not Excel Interface for Planning sheets.

If a value falls outside of the predicted range, we highlight the cell to alert you to a possible anomaly.

Note: We don't detect anomalies for individual splits, or rollups for time, levels, or dimension.

See Detect Anomalies in Sheets.

Outlier Reporting

Release: 2020-09-11

We now enable you to quickly analyze variances between your plan data and the predicted version. You can create a matrix report with the prediction version and 1 or more plan versions. You can also use report calculations to display the variance and then define your own outliers with conditional formatting.

See Steps: Build Outlier Reports.

Workforce Planning: Create Positions from Plans for HCM

Release Date: 2020-09-11

You can now publish the information you gathered in the Positions modeled sheet of your workforce planning instance to Workday HCM.

- Use the new Workforce Action publishing option to select the Positions sheet.
- Find the published data in the Workday Approved New Positions report.
- Generate a workbook where you can modify details and approve each planned position.
- Submit the workbook to mass produce the positions in HCM.

Creating positions updates the Approved New Positions report with a status for each row and a Position ID for each created position. Use the Adaptive Planning data loaders to import data from the updated report back to the modeled sheet. The loaders update only the appropriate rows, syncing HCM positions details with the Adaptive Planning Positions sheet.

See Concept: Publish Plans from Adaptive Planning

Workforce Planning: Drill into Position Detail from Modeled Sheets

Release: 2020-09-11

You can now drill into positions from modeled sheets with mapped dimensions. Click the related actions icon in the Cell Explorer or right-click context menu in the sheet to navigate to the Convenience view.

See Drill Down and Through

Adaptive Planning User Experience

We continue to update Adaptive Planning to provide a more consistent user experience with Workday.

Adaptive Planning

Release: 2020-09-11

We rename the Adaptive Insights product to Adaptive Planning.

Knowledge Center

Release: 2020-09-11

We rename the Knowledge Center to Workday Adaptive Planning.

Changes to User Interface

Release: 2020-09-11

To provide a more consistent user experience, we update the Adaptive Planning user interface by now:

- Displaying the Workday logo in the upper left corner, which you can click to open the navigation menu.
- Updating the login page, Welcome page, Home page, and email notifications to more closely resemble the Workday user interface.
- Updating the user interface with cleaner lines in the top menu bar, including the breadcrumbs, version selector, profile icons, and help icons.

Set Your Adaptive Planning Home Page

Release: 2020-09-11

You can no longer access the Adaptive Planning Home page from the Welcome page. Instead, you can now access the Home page from your profile and the navigation menu.

Profile Menu

Release: 2020-09-11

We reorganize and rename the options that display when you click your profile avatar in the top menu.

We update these to provide a cleaner user experience:

- Active Users icons (available for stand-alone Adaptive Planning customers).
- Product Documentation links.

We rename the:

- Settings button to **View Profile**.
- Logout button to **Sign Out**.

Upload Company Logo

Release: 2020-09-11

If you use Adaptive Planning and other Workday products, you can no longer upload your company logo using the Visual Preferences.

Version Icons

Release: 2020-09-11

We update the version icons in the version drop-down for all areas of a model. You can also view the new icons when you access the version list by selecting **Modeling** > **Versions**.

User Experience: Reporting Dashboards

Release: 2020-09-11

With this release, we update reporting dashboard functionality to provide a more intuitive user experience.

You can now access your existing reporting dashboards from the Announcements option on the main navigation menu by selecting **Modeling > Model Management > Others > Announcement Pages**.

This helps to more clearly differentiate the reporting dashboard functionality from the Dashboards capability.

See Concept: Announcements

User Experience: Share Adaptive Planning Reports

Release: 2020-09-11

We enhance sharing functionality for reports in Adaptive Planning. For better usability, we now enable you to share web reports with specific users or user groups. You can still continue to share reports by level access.

Also, your users can now view empty reports that you share with them. When they run an empty report, we don't display any data.

See Share Reports.

Dashboards: Geo Map Conditional Formatting

Intended Release: 2020-10-09

You can now use conditional formatting to override the color of data points that meet certain conditions. For each rule, you can create a conditional formatting expression and associate a data series.

See:

Create Geo Maps

Concept: Conditional Formatting for Charts

Reference: Operators and Functions for Conditional Formatting

Dashboards: Personal Sheet Preferences on Dashboards

Watch the video: 5m 2s

You can now save your view preferences for individual sheets on dashboards. For a better user experience, we also improve the perspective context filters

Save View Preferences for Sheets on Dashboards

Release: 2020-09-11

Customize and save your view preferences for each individual sheet on a dashboard. Before you could only make temporary view changes that revert when you navigate away from the page or make changes at the perspective level. Now any view change including column size and swap columns and rows save when you:

- Update Display Options.
- Change Dimensions in cube sheets.
- Save after data entry.

Set the default sheet view for all users when you share or publish perspectives. Users can then modify their sheet view preferences and even save a new default view from **Display Options**. When you publish a perspective you revert all custom view changes made by users to the current view.

See Concept: Sheet Views.

Perspective Context Filter Behavior Changes

Release: 2020-09-11

Perspective context filters are now visible when you maximize all charts except sheets, and filter options react to element selections. When you select a level attribute or dimension attribute context filter, the available levels and dimension context filters only show selections relevant to the element filter. Cube and modeled sheets now react to level and dimension attribute perspective filter changes.

OfficeConnect: Ad Hoc Analysis

Watch the video: 4m 25s

We enable you to expand the parent elements in a report, enabling you to view and analyze the underlying child elements in context. You can also now collapse the expanded elements to view the roll-up. You can now expand and collapse the rows and columns in your reports to see or hide the underlying children for multiple parent elements.

Also, we now enable you to view the details while you maintain the column or row structure and the Excel formulas.

Example: You can expand the Revenue account and the U.S. level to analyze how the subcategories of revenue compare across the different U.S. levels.

Release: 2020-09-11

See Ad Hoc Analysis

Example: Expand Report Elements for Ad Hoc Analysis

OfficeConnect: Manage Element Groups

Watch the video: 3m 51s

We improve how you maintain element groups by now enabling you to view and edit them in a single location.

We add a new Manage Groups option that you can use to view, navigate, and edit all element groups in your reports.

To enable us to display the changes on your reports, when you select the Refresh option, we now also automatically select the Update Groups option. This reduces clicks to save you time and effort.

Also, you can now create element groups from the elements already applied on your reports.

Release: 2020-9-11

See Create and Manage Element Groups

Example: Use Element Groups to Update Reports

Data Access: Create Dynamic Access Rules

When you create dynamic access rules, the rules update automatically as you update your model. Leverage new capabilities to save time.

Watch the video: 4m 30s

Level-Owner for Access Rules

Release: 2020-09-11

When you create access rules using owned levels, the rules now dynamically update when you change the level ownership of users. You can also use the shortcut as a single main access rule that still provides level-differentiated access, or as a base to create more-simply defined rules for groups and users.

Note: In your list of access rules, a tilde indicates that the rule is based on level ownership.

See Create Dynamic Access Rules.

Updated Access Rule Template

Release: 2020-09-11

You can now enter a tilde in the Level Grant column on the access rule template. This enables a user, or all users in the group, access to the levels they own, automatically including the level's child levels. When you update a user's owned levels, we also automatically update their rules.

See Create Dynamic Access Rules.

Level Attributes for Access Rules

Release: 2020-11-13

Now you can add level attributes to your secured dimensions. Then use them to create access rules. The rules that grant access to level attributes dynamically update when you add or update the level attribute values in your model.

As an example, you can grant view access to all owned levels. Then grant edit access to specific level attribute values. The user can only edit owned levels that are also tagged with the attribute values.

Note: Note: Using level attributes in rules does not protect level attribute values. All users can view and select level attributes in sheets, reports, and charts. Using level attributes in rules is a way to simplify rule creation and fine-tune level access.

See Create Dynamic Access Rules.

Change Add Dimensions Button to Add

Release: 2020-11-13

In the access rule toolbar, we change the **Add Dimension** button to **Add**.

Updated Access Rule Template

Release: 2020-11-13

If you choose to secure level attributes, the template now includes **Grant** and **Grant (All Except)** columns for level attributes. You can list the attribute values in either column, but not both. The attribute value can only give access to levels tagged with the attribute value if the user also has access to the level.

See Create Dynamic Access Rules.

Modeling: Version-Specific Account Formulas

With 2020R2, you can add account settings that save different account formulas for each version. You can also override the default and lock the version data for the account. This helps to protect data in locked versions as well as remove the need for version references in account formulas.

Watch the video: 6m 19s

Formula Version Selector and Override Option

Release: 2020-09-11

We add a new Formula Version selector and a new Override option in the account settings, enabling you to create an override account formula for a specific version without affecting other versions and their data.

Also, when you lock a version, we convert all account formulas to override formulas.

See Edit Account Formulas and Override Formulas.

Override Checkbox Update

Release: 2020-10-09

To make it easier to maintain account settings, we remove the **Override** check box from the Data Type section. Instead, we deliver a new **Override Formula Setting** dropdown.

From the new dropdown, when you select:

- Override Formula, you can add, edit or delete the override for all unlocked versions.
- None, you can add, edit, or delete the default formula for all unlocked versions.

See Edit Account Formulas and Override Formulas.

Modeling: Maintain Shared Formulas

With 2020R2, we deliver more import options that you can use to mass create and edit shared formulas, saving you time and effort. We also improve exported files for greater usability.

Watch the video: 2m 37s

Update and Append Import Option

Release: 2020-09-11

When the level and account match the existing formula, you can use a new Update and Append option that enables you to:

- Delete shared formulas if you you leave the formula column blank.
- Replace shared formulas if you enter a new formula.

You can also use the option to add shared formulas when the level and account don't match the existing formula and you enter a formula.

See Import and Export Shared Formulas.

Export to CVS File

Release: 2020-09-11

We now automatically download the formulas a CSV file on your local drive when the rows exceed 1 million. This helps to improve performance by preventing Excel failures.

Modeling: Derived Dimension Values on Modeled Sheet Rows

Watch the video: 5m 28s

Release: 2020-09-11

Derived dimension values let you dynamically group data based on user-defined multi-dimensional lookup rules. Dimension values in modeled sheet rows are returned based on your rules.

Derived dimension values help you plan at a high-level with aggregate data, while giving you the flexibility to make adjustments at the individual item level.

You can now use derived dimension values to dynamically group data based on user-defined, multi-dimensional lookup rules. This enables you to analyze possible impacts when planning key performance indicators based on new groupings. To save you time and effort, we also populate the derived dimension values on modeled sheets based on the rules you configure.

See:

- Create Derived Dimension Values for Modeled Sheets
- Map Dimension Values with Dimension Mapping

Small but Noteworthy

Release: 2020-09-11

Update for sales planning customers that use derived dimensions.

- Search in dimension mapping tables on dashboards.
- Dimension mapping tables react to perspective context filters.
- Move mapping values between rows in your dimension mapping table.
- Derived dimensions can now be secured with access rules.
- Import and export dimension mapping rules and download the template.

Workday Using Adaptive Planning: Publish Financial Plans

Release: 2020-09-11

You can now publish financial plan versions from Adaptive Planning to Workday. This enables you to preview plans in Workday, generate management reporting, and execute budgetary control. This also minimizes the need to manually synchronize data between Adaptive Planning and Workday. You can also create import and export mapping to match values across planning and financial hierarchies.

We recommend that you contact your Customer Success Manager to use this functionality.

See Concept: Publish Plans from Adaptive Planning

Integration: Design Integrations with PGP Encryption

Release: 2020-09-11

You can now use PGP to decrypt and encrypt files in Custom Cloud Data Source (CCDS) and Custom Cloud Loader scripts. Create a PGP public and private key pair in the Credentials area of the Component Library. Then reference this key pair in your scripts when decrypting or encrypting a file. You must have integration for Adaptive Planning.

See: Set up PGP Encryption

Integration: Union Tables in Design Integrations

Watch the video: 2m 9s

Release: 2020-09-11

You can now create union tables in Design Integrations to combine the results of any two data source tables into one. Unions help when combining the same type of data from reports in multiple locations. Must have integration for Adaptive Planning.

See: Set Up a Union Table

Integration: Design Integrations with Secure FTP (SFTP)

Watch the video: 2m 20s

Release: 2020-09-11

You can now access Secure FTP (SFTP) data in Custom Cloud Data Source (CCDS) and Custom Cloud Loader scripts. You must have integration for Adaptive Planning.

See: Set Up and Configure an SFTP

Integration for Adaptive Planning

Update Only Existing Rows in the Planning Data Loader

Release: 2020-05-14

You can now select an option to update only existing rows when you import to a modeled sheet with the Planning Data Loader. This lets you avoid appending new rows when you import updated rows.

See Create a Planning Data Loader

Use the eraseData API to Erase Actuals or Plan Data

Release: 2020-09-11

The new eraseData method provides the same capabilities as eraseActuals but also includes the ability to erase Plan data, with additional control over specific account-plan combinations that are targets. Cell notes matching the criteria will also be deleted.

See eraseData

Use More Options with the exportData API

Release: 2020-09-11

We improved the `exportData` API to make exporting more efficient and flexible.

- Use `markBlanks=true` in the `exportData` API to prevent the output of rows containing only blanks or a combination of blanks and zeroes.
- in API v25 and above, the `includeRollups` attribute is replaced with `includeRollupAccounts` and `includeRollupLevels` for including rollups in your output. You must have an Account or Level filter to use `includeRollupAccounts` or `includeRollupLevels`.

See exportData

Use the Enhanced Planning Data Source

Release: 2020-09-11

We enhanced the Planning Data Source to make it more flexible.

- Import Structure now requires a manual user action, and won't automatically run when you select Import Data.

See Set Up Adaptive Planning as a Data Source

Support for Sage Intacct Non-Posting Dimensions

Release: 2020-11-13

We added a new option for Sage Intacct data sources that lets you include active non-posting dimensions in your results. This option supports the November 2020 change Sage Intacct made to parent/child logic for Class, Location, and Department dimensions.

See Steps: Set Up SAGE Intacct Data Sources

Unpivot Workday Multi-instance Objects

Release: 2020-11-13

When you select reports from Workday in the Workday Data Source, you get a new option for multi-instance field behavior. Choose flatten to unpivot the data for consumption by Adaptive Planning. This option closely mimics how Workday export to Microsoft Excel handles multiple multi-instance objects and works best for reports that contain 1 multi-instance object. Ask your implementer to make this option available in your instance.

See Select Workday Reports in Workday Data Sources for Adaptive Planning

Clear Mappings for Metadata Loaders

Release: 2020-12-10

You can now clear mappings from metadata loaders without deleting and recreating the loader.

See Create Planning Attribute Loaders

Create Planning Account Loaders

Create Planning Dimension Loaders

Create Planning Level Loaders

Dashboard View Settings

Multi-Select Filters

Release: 2021-01-15

You can now select multiple levels and dimension values with dashboard context filters. Use the **Selected** tab to view and remove selections. Dimension mapping and sheets on dashboards are not supported.

Encrypt SAML Assertions from Identity Providers

Release: 2020-09-11

To improve the security and privacy of your user information, we now enable you to encrypt the SAML assertion that your identity provider sends to Adaptive Planning by using an official public key certificate. During SAML SSO, Adaptive Planning decrypts the SAML assertion with a private key and validates the signature. After successful validation and authentication, users log in to Adaptive Planning.

See Configure Your IDP for Encrypted SAML Assertion

Filters and Views for Adaptive Planning Sheets

We make it easier to get to the data you need in your sheets. We add filter options to modeled sheets and we improve your ability to save your view preferences in standard sheets.

Modeled Sheet Filter Options

Release: 2020-09-11

We deliver these new filter display options, making it easier to find specific modeled sheet rows:

- Is Empty. You can't use this for levels and text selectors.
- Is Not Empty. You can't use this for levels and text selectors.
- Uncategorized. You can only use this for custom dimension columns.

See Suppress Zeros and Blanks and Change Modeled Sheet View.

Filters for Adaptive Planning Reports

Release: 2020-09-11

We deliver filter functionality to make it easier for you to find the data you need in your reports, saving you time and effort. We deliver a new Uncategorized filter as a display option, making it easier to find specific modeled report rows. You can only use the new filter for custom dimension columns.

Process Guide Navigation

Release: 2020-09-11

We make it easier for your users to access their process guides by providing improved navigation on the process overview page.

We deliver a new **Go to Process Guide** link on the process overview that your users can click to view and complete all assigned tasks, making it easier for them to find their assigned tasks. When a user clicks a specific task assignment on the process overview, Workday directs them to the task in the process guide.

Also, your users can now click the process name in the process guide to easily navigate back to the process overview.

See Complete Tasks in a Process.

Sales Planning: Territory Planning Reference Solution

Release: 2020-09-11

We deliver a new reference solution that supports territory planning and operational flow. The solution includes data models and a set of dashboards, and enables you to:

- Assign teams based on role.
- Change data capture for incremental export.
- Create a change request for an account transfer, and submit it for approval.
- Recommend territory.
- Segment accounts and carve territory.
- Use geo dimensions with data for countries and data for the US down to zip codes.

See Example: Territory Planning Solution

Modeling: Plan Version Rates for Virtual Versions

You can now configure virtual versions to use the plan rate for the exchange rate version, even when the exchange rate version has actuals overlay. This provides constant currency reporting by removing the variances due to different exchange rates between versions.

Enable Constant Currency Reporting

Release: 2020-11-13

We deliver a new **Enable Constant Currency Reporting** check box on the virtual version configuration page. This enables the virtual version to use the exchange rate of the plan for periods with actuals overlay.

Retire Report Charts For Adaptive Planning

Release: 2020-9-11

We now retire the charting functionality within Matrix reports since it is no longer needed. We recommend that you use the Dashboards capabilities in the Adaptive Planning product instead.

Note: If you haven't enabled the Dashboards functionality in Adaptive Planning, we recommend that you contact your Customer Success Manager.

Miscellaneous: Small but Noteworthy

Publish Plan

Release: 2020-9-11

- Publish data from linked levels to Workday HCM and Workday Financials.

See Concept: Publish Plans from Adaptive Planning.

OfficeConnect Reports

Release: 2020-9-11

You can now specify a regional gateway when it becomes available to you. This allows you to maintain your data sovereignty requirements.

When authentication options become available in different regions, use the **Regional Settings** option to configure OfficeConnect to use an authentication located in the same region as your company.

See Set Up OfficeConnect with Regional Settings.

Web Reports

Release: 2020-9-11

- The this.timeper.positionof() formula now works with the Display As > Custom report element at leaf levels in Matrix reports. Previously when you applied this element to time related functions such as fiscalmonth(this), the result was always a zero (0). Now leaf-level time periods such months resolve correctly. Calculations for rolled up periods such as years still result in a zero with the Display As > Custom element.
- Previously, an error message sometimes incorrectly displayed stating that no accounts matched the given attributes if the following conditions applied to a matrix report:
    - Includes account attributes, version, time, and level
    - Rows with zeros and blanks are suppressed
    - An associated account has no value for a specific intersection

The incorrect error message no longer displays for the above conditions.

- Data now displays correctly for all rows in a matrix report that includes all of the following:
    - Rollup() functions for levels and dimensions
    - More than four tiers of data
    - Rollups suppression
- The Share Reports button and associated permission has now been renamed to Send Notifications for matrix reports.

OfficeConnect and Web Reports

Release: 2020-9-11

The attribute value for a GL account linking to a cube account now calculates correctly when used with multiple levels in the filters for:

- OfficeConnect reports
- Matrix reports in Adaptive Planning

Previously, the account attribute value returned a zero.

Data Import to Locked Levels in Sheets

Release: 2020-9-11

When importing data into any sheet for a specific version, the data import for rows associated with a locked level can fail. Based on their permissions and level access, users can receive an error message for the following Workflow statuses:

- Submitted for Review
- Approved
- Approved and Locked

The import in general succeeds but ignores updating the locked rows. Super users with the *Import To All Locations* permission can continue to import data to all sheets regardless of Workflow status.

See Steps: Use Workflow.

Cube Sheets

Release: 2020-9-11

We corrected evaluator logic used in some cases for calculated cube accounts containing a conditional formula that:

1. References another account within the same cube sheet.
2. Contains formula logic that checks if the account matches account attributes AND level attributes.

In some situations, this logic was evaluating incorrectly to check if the account matches account attributes OR level attributes. Cube accounts like this now correctly evaluate the conditional statement to check if the account matches account attributes AND level attributes to proceed.

Modeled Sheet Timespan Accounts

Release: 2020-11-13

You can now select **Planned by Balance** for cumulative timespan accounts in modeled sheets.

See Reference: Settings for Custom Accounts.

updateDimensions API enhancements

Release: 2020-12-11

New line characters for dimension values in the payload of an `updateDimensions` request get replaced with a blank space character.

We now handle multiple renames of the same entity in the same `updateDimensions` call. This helps resolve an issue when names swap more than once in a remote system between synchronizations into Adaptive Planning.

See updateDimensions.

SAML SSO Tile for Workday Adaptive Planning

Release: 2020-12-11

You can update the tile image you use in your IDP to match our rebranding to Workday Adaptive Planning.

See Reference: SAML SSO Settings.

2020R1 Release Notes

2020R1 Release Notes

Watch: Recording of the Adaptive Insights 2020R1 release overview and Q&A

Integration

Bulk Update Modeled Sheet Rows

Watch the video: 3m 2s

You now get additional options when you import data to modeled sheets.

Update Rows by Uploading a Spreadsheet

When you import into a modeled sheet you get two options to update existing rows:

- Update existing rows.
- Update existing rows and add new rows.

Indicate the dimension or level your upload should use as the import key, and matching rows throughout the sheet update. When a single row in the import matches multiple rows in the modeled sheet, all matching rows get updated.

For importing modeled sheet data, you may get an error if the sheet has duplicate column names, even if the template does not. To correct, remove duplicate column names from the sheet. For instructions on how to change the column names, see Add or Edit Modeled Sheet Columns.

Best Practice: Download your modeled sheet data, then create a version from the sheet version selector or in the Version Admin. Test your update in the new version to verify you get the results you want.

See Spreadsheet Import.

Update Rows Using a Planning Data Loader

When you create a Planning Data Loader, select the modeled sheet to update and indicate the dimension or level column to use as the key for row matching.

See Create a Planning Data Loader.

Update Rows by Making an API Request

Use the `importConfigurableModelData` API to update. Set the level column or dimension column as the import key for rows you want updated. You get two options for how the update works:

- Update: Only matching modeled sheet rows update. Get a warning when matching rows aren't found.
- Update and add new rows: Create new rows when the import key doesn't find matching rows to update.

See importConfigurableModelData.

Export Groups Using APIs

Available in API v23+

Use the new `exportGroups` API to export the user groups in an instance. Both `exportUsers` and `exportLevels` APIs now indicate `groupIds` to show what groups a user or a level belongs to.

See exportGroups and exportLevels.

Modeling and Access Rules

Protect Modeled Accounts with Access Rules

You can now use access rules to define the modeled accounts your team can view and edit. In the access rule template, choose to list the modeled sheet name, which controls all the accounts on the sheet, or list each account code with the sheet prefix. You can use:

- Initial Balance accounts (example: Personnel.Payrate).
- The Timespan account (example: Personnel.Timespan).
- Any account in the sheet, including those used as display columns (example: Personnel.Salary).

Access rules work throughout your model:

- Sheets
- Reports
- Dashboard charts
- OfficeConnect
- Excel Interface for Planning

See Concept: Access Rules and Access Rules and Your Model.

Quick View of Cube Account Types

The cube sheet's account list now includes a column with differentiating account types, like standard, metric, assumption, calculated, or linked. The type, *Cube*, is listed for the root account and groups.

See Cube Sheet Overview.

Import and Export Shared Formulas

Watch the video: 2m 56s

Manage shared formula updates faster with the new **Export Formulas** and **Import Formulas** buttons.

- Export all the shared formulas for a single account and version.
- Or export all the shared formulas for the entire version in all accounts.
- Use the export to audit and update the formulas. Then import the updates in bulk.
- Export the formulas from one instance or version and import to another.

See Shared Formulas Overview and Import and Export Shared Formulas.

Eliminations with Minority Interest Trading Partners

Before, elimination rules accounted for the consolidation percent of only one of the trading partners. Unbalanced eliminations due to consolidation percentages calculated remainders in the difference account.

Now, the elimination calculation accounts for the consolidation percent of both trading partners. The elimination uses the smaller consolidation percentage of the the trading partners. For example, if an elimination level owns 75% of Trading Partner A and 100% of Trading Partner B, the percent applied to the elimination entry is 75%. The remaining 25% is left in the intercompany accounts rather than in the difference account.

Process Tracker

Watch the video: 5m 0s

Create Group Tasks

As a process owner, you can create and assign a task to an existing user group. Depending on what condition you set for the group task completion, either any user or all users in the group can complete the task. The process overview provides an overall status of group tasks with a link to details. The process guide lets task assignees track and manage their group task assignments. Group tasks eliminate the need to create multiple tasks that require the same action from individual assignees.

See Create Processes and Process Tasks.

Link Tasks to Dashboards

When creating a process task, as the process owner, you can select a specific perspective or dashboard to link to from a task. Based on access rights, the task assignee can navigate to the linked perspective or dashboard that provides context relevant to the process and task. Assignees don't need to search through all dashboards they can access to arrive at a specific dashboard.

See Create Processes and Process Tasks.

Collapsible Task List

Intended Release: General Availability March 6, 2020. FRED: None

You can now expand or collapse the task list in your process guide to increase or decrease your workspace.

See Complete Tasks in a Process.

Reporting and Analysis

Dashboards

Watch the videos: 6m 36s

Interactive Dashboards	Sheets are now available on dashboards. Collaborate, enter data, add text, and view charts without leaving your dashboard. Use sheets on dashboards to simplify your planning experience and create rapid what-if analysis scenarios. See Add Sheets on Dashboards. • Save changes to instantly update dependent charts and sheets without having to navigate out of your dashboard. • Create multiple sheets with different display configurations based on the same underlying sheet.
Dashboards as a Landing Page	As an administrator or a user, you can now select a specific perspective or a dashboard as a landing page when you select Dashboards for the Home page option. Administrators can set this for a user in the Edit User page. Users can set this in their profile page. Based on their access, users can then view either the Dashboards overview or a specific perspective or a dashboard as their home page. See Change Your Profile, Home Page, and Email Groups.
Geo Map	Visualize data on a map with circles with the new geo map. The geo map shows data based on the geography region's latitude and longitude. • Compare and contrast values across different regions with circle size, color scale, or both. • Navigate the geography hierarchy down to the zip code level. See Create Geo Maps.
Share Dashboards with User Groups	Share dashboards with many users at once. You can now share perspectives with user groups. See Share Perspectives.

Web Reporting

Suppress Columns with Zeros or Blanks	For matrix reports, a new data visibility option is now available in the report properties. Select **Suppress columns if all zeros or blanks** to hide columns from your report that either have all zeros as values or are all blanks. This capability is not selected by default. See Format Web Reports.

OfficeConnect

Dynamically Update Rows and Columns

Watch the video: 6m 37s

Create and apply element groups to your report rows and columns. An element group includes all immediate children or selected siblings of a parent. For example, the Operating Expenses group includes all children expenses of this parent account. Whenever you add, remove, or reorder the children in a group, update the group to update the report with these changes.

See Create and Manage Element Groups.

Sales Planning

Derive Dimension Values on Modeled Sheets

Important: Contact your Customer Success Manager to get started.

Watch the video: 5m 49s

Derived dimension values let you dynamically group data based on user-defined multi-dimensional lookup rules. Derived dimension values can help simplify your planning process by allowing you to:

- Plan at a high-level with aggregate data.
- Make adjustments at the individual item level.

For example, you can perform dynamic customer segmentation based on the customer demographic attributes geo location, industry, and company size during territory planning. Create a derived dimension to have values on modeled sheets to be automatically populated based on user-defined dimension value mapping rules. Use the new dimension mapping dashboard table to view, update, delete, and create new dimension value mapping rules.

See Map Dimension Values with Dimension Mapping.

Enhanced Experience with Sheets

Watch the video: 4m 5s

Visual and usability enhancements for standalone sheets and sheets on dashboards.

Sheets on dashboards

- You can select custom dimensions in the perspective to filter modeled sheets.
- Cube sheets now display dimension pickers. Maximize cube sheets to edit dimension pickers.
- The search field now remains expanded to indicate applied filters.
- Modeled sheet Display Options is now highlighted when a filter is applied.
- You can now add rows on cube sheets.
- Formula assistant is now available only in expanded mode.

See Add Sheets on Dashboards.

Geo Map Sample Data

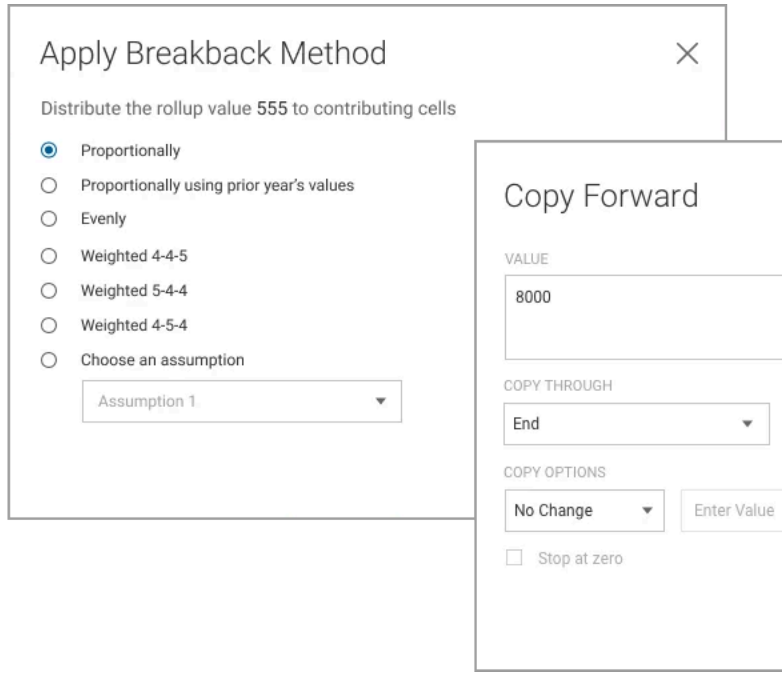
Start creating geo maps with sample datasets that includes latitude and longitude coordinate data.

See Geo Map Coordinate Sample Data.

User Experience

More Improvements in Sheets

Dialog Boxes with Clear Prompts and Labels	Clarified labels and prompts in the Breakback Method, Copy Forward and Delete Splits dialog boxes:



See: Copy Forward and Downward.

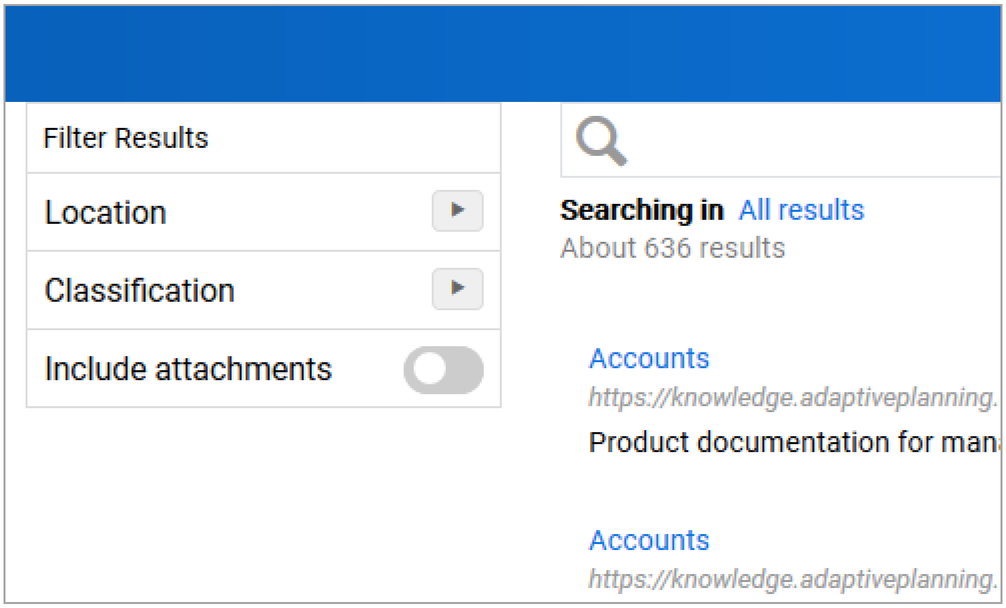
Updated Tooltips, Buttons and More	Tooltips, right-click menus, sparklines, and sheet footers now match our latest sheet design.

Workday Brand Alignment

It's a subtle change that aligns Adaptive Planning more closely to the Workday brand. You'll notice a different shade of blue throughout your instancein the toolbars, buttons, and links.

Knowledge Center Search Filters

The icon carousel in the search results got replaced with a side panel.



Workday Using Adaptive Planning

Important: You must work with a Workday-certified implementer. If you don't have access with an implementer, contact your Customer Success Manager to engage professional services.

Some links in this article go to the Workday Community. If you don't have a Community account, request one.

Watch the videos: 16m 22s

Synchronize User Accounts

You can now access Adaptive Planning from Workday using the same user account for more unified security. Adaptive Planning user accounts synchronize with user accounts in Workday. Adaptive Planning administrators can then assign users the appropriate role and level permissions in Adaptive Planning.

- If your organization has multi-instances of Adaptive Planning, you can now access them from Workday. See Access Multi-Instances from Workday.
- You can now easily manage and switch between multiple Workday tenant connections for OfficeConnect and Excel Interface for Planning. See Set up OfficeConnect and Excel Interface for Planning with Workday Credentials.

Access OfficeConnect and Excel Interface for Planning from Workday

Watch the video: 4m 44s

If your instance is set up with Workday and your user accounts are centrally managed from Workday, your IT admin can set up your OfficeConnect users to log in with their Workday credentials. Once setup, any users with OfficeConnect or Excel Interface for Planning can log in using their Workday credentials.

See Set up and with Workday Credentials.

See Sync Users with Adaptive Insights

Publish Headcount Plans

You can now publish plan versions from Adaptive Planning to Workday. This enables you to preview plans in Workday, generate management reporting, and support downstream actions, such as position creation, streamlining your plan to execute process. This also helps minimize the need to manually synchronize data between Workday and Adaptive Planning.

To set up, you'll need to define a user group and give the group the Publish access type. Members of this group will get an additional main navigation link for Publish Plan. This link will let you:

- See a detailed history of what published
- Review publication status
- Publish plans
- Take action on messages

See Concept: Publish Plans from Adaptive Planning.

Important: To publish plans, the Workday credential for your Workday data source must use JWT Bearer for Client Grant Type. See Switch Client Grant Type to JWT Bearer Token.

Adaptive Planning Notifications in Workday

You can now access your Adaptive Insights alerts directly in Workday, providing a central location for all notifications. You can also access direct links in these notifications that gets viewers directly to the appropriate location in Adaptive Planning where applicable. This makes it faster and easier for you to find the items that you need to take action on.

These Adaptive Planning alerts are available as Workday notifications:

- Processes
- Workflow
- Reports
- Dashboards
- Integration

Use Adaptive Planning APIs with Workday Credentials

Workday-synchronized users can access the Adaptive Planning public APIs with their Workday credentials. An administrator in Workday first configures the Adaptive Insights API task and API timeout for the users who need to run the APIs. Requests for Adaptive Planning APIs from Workday-synchronized users replace the `username` and `password` in the `credentials` element with a `ticket` that functions as an access token.

See Making Adaptive Insights API Requests with Workday Credentials.

Multi-Instance Support for Workday

If your organization uses multi-instances, you can now access multiple Adaptive Planning instances from Workday.

Set Up OfficeConnect and Excel Interface for Planning with Multiple Tenant Associations in Workday

When configuring OfficeConnect and Excel Interface for Planning for Workday login, you can now save multiple Workday tenant associations using user-friendly names. Users with multiple tenants in Workday can connect to multiple instances in Adaptive Planning. For example, a production Adaptive Planning instance connected to a production Workday tenant and a sandbox Adaptive Planning instance connected to a sandbox Workday tenant. When OfficeConnect and Excel Interface for Planning users log in using their Workday credentials, they can switch between the instances using the **Switch Tenant** option on the Workday Log In window. Previously, users had to manually overwrite the login settings to switch between tenants.

Where's the Docs?

Workday related documentation from the Integration area of the Adaptive Planning knowledge center moved into the Workday community. Make sure you update any browser bookmarks that link to the moved content.

Was in Knowledge Center	Now in Workday Admin Guide
Set Up a Workday Data Source	Steps: Set Up Workday Data Sources for Adaptive Planning
	Steps: Create Workday Credentials in Adaptive Planning
	Select Workday Reports in Workday Data Sources for Adaptive Planning
Set Up a Workday External System for Drillback and Publishing Plans	Set Up Workday External Systems for Adaptive Planning

Workforce Planning with Workday HCM

Workforce planning is an Adaptive Planning instance that uses your Workday HCM data. The model foundation includes dimension and data loaders, top-down and bottom-up modeled sheets, dimensions, and formulas.

Workforce Planning Benefits

- Get an accurate picture of your workforce and adapt to changing requirements.
- Drive what-if scenarios.
- Create effective hiring plans, identify gaps, and align with business goals.

What Workforce Planning Does

- Stream Workday data to Adaptive Planning sheets.
- Enter and edit data in Adaptive Planning sheets to model your plans.
- Model headcount, skills, transfers, planned hires, and attrition.
- Share plans with your people managers.
- Get their feedback and buy-in early and often.
- Check actuals to plan and take corrective actions when needed.

Set Up Workforce Planning

The workforce planning instance is a separate instance from your Adaptive Planning financial planning instance. To get started:

- You must contact your Customer Success Manager.
- You don't need an existing financial planning model.
- You do need Workday HCM. If you don't use Workday HCM, use the personnel planning sheet that comes with your financial planning model to manage your workforce. Or, contact us to discuss other options.

Workforce Planning Foundation Model

Workday - Adaptive Planning Integrations	Adaptive Planning Model Structure
• Workday custom reports • Workday credential • Adaptive Planning data sources • Adaptive Planning data loaders	• Structured with assumptions, drivers, and formulas • Preset modeled and cube sheets • Levels • Custom dimensions • Custom dimension attributes

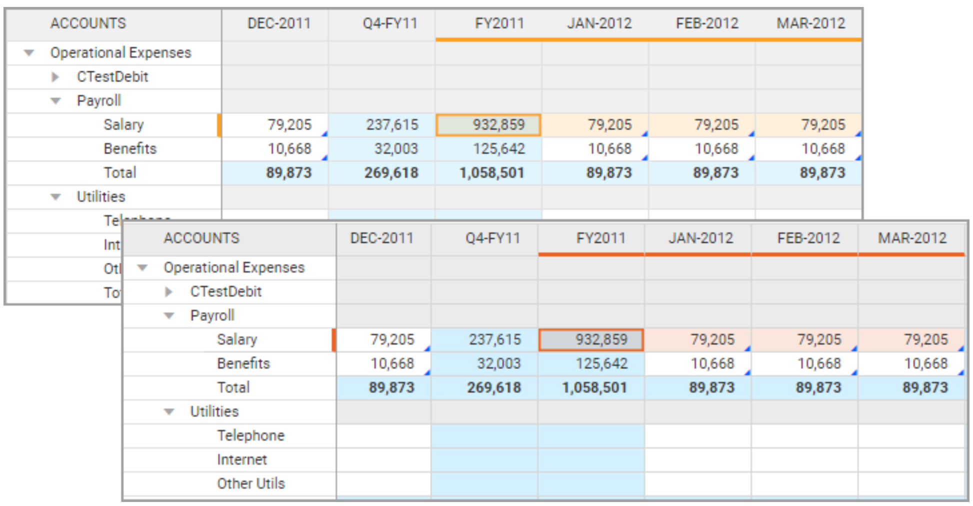
See Reference: Workforce Foundational Model.

Small but Noteworthy

Set Visual Preferences for Sheets

Administrators can use the new display setting to increase the contrast of all sheets for the entire instance. Grid lines and colors appear darker, so it's easier to view sheets on projectors. Go to **Administration** > **Visual Preferences** and select the **Enhance the visual contrast in sheets** checkbox.

See Reference: Visual Preferences.



Modeled Sheet Enhancements

- Clearing data in a modeled sheet cells now results in blanks instead of zeros for number type columns. This improves calculations and reporting data. Right-click a cell and select **Clear**. See Reference: Clearing Data in Cells.
- Downloading is only available for 1.5 million cells or less. If the download button is inactive, use filters to reduce the sheet size.

Additional Memory Limit for Reports

For web reports, there is now an additional memory limit and users get an error message if a report exceeds this limit. Report runners can modify a report to reduce the number of elements and rerun it.

Previously, when creating reports, the existing limits did not consider certain conditions. This led to a report becoming unresponsive if it crossed the allocated memory.

Retired Functionality

2020R2 Retired Functionality

Provides information about retired functionality announced in this release.

Sales Planning

Features	Object Modeling
Replacement	The introduction of derived dimension values replaces the old object modeling experience for territory planning.
Why?	The introduction of derived dimension values simplifies the territory planning process.
Effective Date	As of 2020R2 general availability.
Notification Date	N/A
Action Required Details	N/A
Workgroup?	None
Workgroup Information	N/A
Notes	

Features	Transaction Tables
Replacement	Use a modeled sheet instead for territory planning.
Why?	The introduction of derived dimension values simplifies the territory planning process making use of your data on modeled sheets.
Effective Date	As of 2020R2 general availability.
Notification Date	N/A
Action Required Details	N/A
Workgroup?	None
Workgroup Information	N/A
Notes	

Web Reports

Features	Matrix report charts
Replacement	Use the Dashboards capabilities within Planning

Why?	We now retire the charting functionality within Matrix reports since it is no longer needed. We recommend that you use the Dashboards capabilities in the Adaptive Planning product instead. Report charts rely on outdated flash technology which is becoming obsolete for support on all browser platforms at the end of 2020. Use Dashboards for your current visualization needs.
Effective Date	As of 2020R2 general availability.
Notification Date	NA
Action Required Details	If you haven't enabled the Dashboards functionality in Adaptive Planning, we recommend that you contact your Customer Success Manager.
Workgroup?	None
Workgroup Information	NA
Notes	

Integration

Features	Custom Scripts - Pervasive Connector
Replacement	Use other components of the Integration Framework.
Why?	Effective January 1, 2020, we no longer received software updates, fixes, and other forms of support from (Actian, formerly known as Pervasive) the third-party vendor. The code supporting the Pervasive Connector will be removed in the next release and the hosted connectors will no longer function.
Effective Date	As of 2021R1.
Notification Date	August 8, 2020
Action Required Details	NA
Workgroup?	None
Workgroup Information	NA
Notes	Adaptive Planning recommends these legacy connectors be transitioned over to the Adaptive Planning Integration Framework. All customers were contacted to migrate away from the Pervasive Connector by January 1, 2020.

2020R1 Retired Functionality

Provides information about retired functionality announced in this release.

Sales Planning

Features	Territory Maps
Replacement	Use the new geo map for territory planning.
Why?	The flexible new geo map replaces the need for the old territory map.
Effective Date	As of 2020R1 general availability.
Notification Date	N/A
Action Required Details	N/A
Workgroup?	None
Workgroup Information	N/A
Notes	

Features	Object Modeling
Replacement	The introduction of derived dimension values replaces the old object modeling experience for territory planning.
Why?	The introduction of derived dimension values simplifies the territory planning process.
Effective Date	As of 2020R2 general availability.
Notification Date	N/A
Action Required Details	N/A
Workgroup?	None
Workgroup Information	N/A
Notes	

Features	Transaction Tables
Replacement	Use a modeled sheet instead for territory planning.
Why?	The introduction of derived dimension values simplifies the territory planning process making use of your data on modeled sheets.
Effective Date	As of 2020R2 general availability.
Notification Date	N/A
Action Required Details	N/A
Workgroup?	None
Workgroup Information	N/A
Notes	

2019.3 Retired Functionality

Find information about retired functionality from Adaptive Planning starting with Release 2019.3.

OfficeConnect

Features	OfficeConnect file extension `.xlsxai` is no longer supported
Replacement	You can now save the OfficeConnect reporting workbooks as Microsoft Excel workbooks using the standard `.xlsx` file extension.
Why?	OfficeConnect now provides an enhanced experience in Microsoft Excel and supports many of the standard Excel capabilities. The application no longer launches as a separate Excel process. You can just start Excel and log in to OfficeConnect in the same Excel process. OfficeConnect now persists with other Excel add-ins.
Effective Date	As of 2019.3 general availability, we will support upgrading the `.xlsxai` files for up to 12 months.
Notification Date	N/A
Action Required Details	Upgrade your existing OfficeConnect files to Microsoft Excel files within the 12-month grace period.
Workgroup?	None
Workgroup Information	N/A
Notes	

API

Features	`rootActuals` is no longer supported in the `exportVersions` API method across all API versions. `rootActuals` indicated whether the root actuals version should be included when actuals are hidden from the version selector.
Replacement	Grant the user permissions to view the Actuals versions instead of hiding them.
Why?	With the introduction of access rules, we updated the API to reflect the new functionality.
Effective Date	As of 2019.3
Notification Date	N/A
Action Required Details	Remove `rootActuals` from `exportVersions` requests and not include it in API scripts in the future. Existing `exportVersions` API with this setting will return a specific error to help with troubleshooting.

Workgroup?	None
Workgroup Information	N/A
Notes	

