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Inside Workday Rising US 2025

Higlights, Key Insights, Innovations, and Takeaways from Workday Rising

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Introduction

For us, Workday Rising is where the big picture meets real execution. It is where product direction, customer stories, and innovation come together.

Inside Rising US 2025 is your shortcut to the most important insights from the week. If you missed sessions or want a crisp way to brief your team, this e-book distills what matters so you can act with confidence.

This year's Rising put AI agents front and center, alongside a stronger core for HR and Finance. You will see how Workday is moving from features to outcomes, with agents that sit in real workflows, an open platform to connect your stack, and simple consumption with Flex Credits. Extend and Build continued to mature, the Marketplace expanded, and new partnerships made data and interoperability easier.

In each summary, you will find:

- Why it is worth your time
- What was covered
- Key takeaways you can apply

Whether you work in HRIS, Finance, Product, Architecture, or Consulting, use this as a field guide for what is next in the Workday ecosystem.

Let's dive in!


Rick Leunisse & Matt Komendolowicz
Managing Partners, Incubane


Helen Kromberg & Cristene Kruiter
Managing Partners, VirtualResource

How to use this e-book

The E-Book

This e-book packs a lot of value. Please share it with your team so each owner can review the parts that match their scope, for example HR, Talent, Learning, or IT. The table of contents is clickable, so you can jump to any section in one click. At the bottom of every page you will find a link that takes you back to the home page, so navigation stays simple.

Executive Powerpoint

Alongside the e-book, you will receive a companion PowerPoint. The first half is an executive summary that HRIS leaders can present to bring stakeholders up to speed on the most important announcements. The second half is a strategy template. You can use it as is, or let our custom GPT populate it. The slides are kept short, with space for your data, your priorities, and next steps.

Custom GPT

Given the vast amount of very valuable knowledge we also created a custom GPT. It can read this e-book, answer questions, and fill the PowerPoint with tailored content. Ask it things like:

- What are the newest AI features in HCM?
- My role is {role descriptions} which sections should I read?
- Compare the value of Agents vs Extend for frontline managers
- Draft a 90-day adoption plan for HR Help.

It will point you to the right pages, summarize key points, suggest use cases, and generate slide text you can edit.

Note: the custom GPT will not ask for company specific information, only your Workday footprint. However, please validate with your company policy if you are allowed to use ChatGPT.

[Click for Custom GPT]

Keynotes

What to Tell Your Executive Team

- The Workday Platform: Transforming Work with Agentic AI
- Workday Community: Elevating What's Possible
- CHRO Advantage: Unlocking Agility, Unleashing Human Potential
- Reshaping the Office of the CFO Through Human-AI Partnership
- Accelerating CIO Transformation with an AI-First Open Platform for Work

Want to innovate faster? Explore Workday Extend

What is Extend

Workday Extend lets you build native apps inside Workday. You use the same security, data, and UX. No extra integrations. Faster delivery and lower risk.

Why Extend Pro matters

Extend Pro adds AI capabilities, copilot for faster development, and now the Flowise capabilities to build custom agents. You can design complete AI applications and end to end processes that drive real ROI.

Read these sections first

- Extend overview, customer stories, and roadmap
- Orchestrate for workflow and integrations
- AI and Agents with Extend
- Governance, security, and support models

Quick examples to spark ideas

- Seasonal hiring hub, with offers, provisioning, and badge requests
- Tuition reimbursement, with policy rules and auto-approvals
- Conflict of interest disclosures, with reminders and audit trail
- Bulk terminations and offboarding tasks at scale
- Policy hub with read-and-acknowledge and versioning
- Vendor onboarding with risk checks and SLA tracking

Incubane's Extend Business Case Playbook

Not sure where to start? Our Playbook shows how to pick the right use cases, size the ROI, plan the build, and run the launch. It includes a scoring model, cost and benefit templates, and stakeholder maps. Use it to secure budget and move fast.

The Workday Platform: Transforming Work with Agentic AI

HCM
Finance
IT

Speakers

Aneel Bhusri, Gerrit Kazmaier, Jerry Ting, Asshna Kircher (Workday)
Shridar Ramaswamy (Snowflake), Charles Lamanna (Microsoft)

Why This Session Matters

This keynote sets the direction for Workday in the AI era. It explains how AI agents, an open platform, and partnerships will help customers move from pilots to real outcomes in HR and Finance. If you are planning your 2026 roadmap, this is the signal on where Workday is investing and how you can align.

What Was Covered

Workday framed a "next-gen ERP" for people, money, and agents. The foundation is twofold, an AI strategy rooted in Workday's data and process context, and an open platform so customers and partners can build and connect safely. The keynote introduced new AI agents for complex processes like performance reviews, HR case management, financial close, payroll and frontline scheduling, with proof points from early adopters. Consumption moves to Flex Credits so AI is built in, measurable, and scalable.

The platform story expanded. Workday Build adds developer tools such as Developer Copilot, Orchestrate, and an Agent Builder based on Flowise to make low-code agent creation possible, governed by an Agent System of Record. Workday Data Cloud provides zero-copy access and direct SQL on Workday data, with new partnerships to enable bi-directional analytics and agent handoffs. The session closed with a front-end shift, announcing the Sana acquisition to bring a unified "AI is the UI" experience for search, action, and learning across enterprise systems.

The Workday Platform: Transforming Work with Agentic AI

HCM

Finance

IT

Key Announcements & Takeaways

- New wave of Illuminate AI agents: HR Case, Performance, Financial Close, Payroll, Frontline, BP Optimize, and others, focused on measurable ROI and compliance.
- Flex Credits: AI usage included in base subscription, transparent metering, scale as you grow, usable across any agent and even APIs.
- Workday Build: developer platform with Developer Copilot, Orchestrate for low-code integrations, and Flowise-based Agent Builder to design agents with drag-and-drop and plain-language specs, governed in the Agent System of Record. Early adopter timing in first half of 2026.
- Workday Data Cloud: open lake on Apache Iceberg, direct SQL access, Prism governance, zero-copy data sharing. Initial partners include Snowflake, Salesforce, and Databricks. Use cases include real-time anomaly detection and closed-loop actions in Workday.
- Microsoft partnership: Entra ID integrated with Workday's Agent System of Record. Copilot Studio agents can register in Workday, appear in org charts, and orchestrate tasks with Workday agents.
- Paradox acquisition: expands AI-powered high-volume hiring and candidate experience, with material cycle-time improvements reported.
- Sana acquisition: introduces a new Workday front door where employees can find knowledge, act, build simple apps, and automate workflows using a unified AI interface. Expect daily engagement and deeper cross-system actions.
- Practical demo theme: Chipotle scenarios showed agents coordinating planning, hiring, contingent staffing, scheduling, payroll compliance, and revenue contract checks, turning variance detection into actions that protect revenue and experience.

The Workday Platform: Transforming Work with Agentic AI

HCM
Finance
IT

Bottom line: Workday is moving from add-on AI features to embedded agents, from closed suites to an open platform, and from occasional HR logins to a daily AI front end. Start by identifying one or two agent scenarios with clear ROI, prepare data access through Data Cloud, and plan governance using the Agent System of Record.

Workday Community: Elevating What's Possible

HCM

Finance

IT

Speakers

Carl Eschenbach, Emma Chalwin, Sheri Rhodes, Rob Enslin, Patrick Blair (Workday)
Jason Girzadas (Deloitte), Christina Hall (Instacart), Fran Katsoudas (Cisco), Danny Koblin, Janet Evans (LA28).

Why This Session Matters

This keynote is the community lens on Rising. It focuses on how customers apply Workday to deliver measurable outcomes in HR and Finance, while staying human centric with AI. If you want examples, metrics, and patterns you can reuse, this session shows what works in real organizations at scale.

What Was Covered

Workday set the tone around an AI powered, human centric, future ready platform. Highlights included purpose-built agents, an open platform with Workday Build, low-code Flowise Agent Builder, and the role of Data Cloud and partnerships to enable secure, bi-directional data and cross-system action. The vision is practical adoption, clear ROI, and simple consumption.
Customer stories brought that vision to ground. Cisco shared a top-down and bottom-up AI enablement program that raised employee confidence and idea flow. Instacart showed how Extend removed a messy mix of tools from performance calibrations, creating a single source of truth with faster decisions and higher manager completion. LA28 and Deloitte walked through the scale of delivering the Games, the workforce ramp, and how reusable technology and integration will power fan, athlete, and community experiences. Workday also recognized award winners across transformation, innovation, finance, future readiness, and time-to-value, each with specific, repeatable outcomes.

Workday Community: Elevating What's Possible

HCM

Finance

IT

Key Announcements & Takeaways

- Workday agents focus on real process outcomes in HR and Finance; the direction is embedded AI with measurable productivity and compliance impact.
- Build and Flowise Agent Builder make it easier to design and govern custom agents inside Workday; plan for low-code builds with clear ownership and an agent registry.
- Data strategy is central; expect secure, bi-directional access and open partnerships to connect Workday data to your broader stack.
- Cisco's "teaming with AI" boosted comfort from the 60s to the 90s after training, generated 200+ use cases in the first months, and doubled adoption when leaders used AI; copy the leader-led model and provide role-based prompt libraries.
- Instacart's Extend solution unified performance calibration, improved manager trust and completion to about 90 percent, and saved HR more than 60 hours; target processes that live across spreadsheets and third-party tools.
- LA28 will scale from hundreds to 4,000+ employees plus 75,000 volunteers; use Workday to plan workforce ramp, security, accreditation, and logistics with reusable components.
- Customer award patterns you can reuse:
    - Access and identity on Extend at very large scale raised self-service requests from 20 percent to 61 percent in six months and saved about 15,000 hours a year.
    - Consolidating dozens of legacy systems into Workday, then driving adoption with Journeys, articles, and on-demand learning, accelerates ROI; turning on AI features early helps.
    - Finance modernization with Prism, Extend, and Direct Intercompany removed 800 allocation rules and 21,000 manual entries a year, speeding close.
    - Skills programs that map thousands of skills to nearly the full workforce unlock internal mobility; Career Hub and mentor matching lifted engagement by more than 50 percent.

Workday Community: Elevating What's Possible

    - Rapid Workday Help deployment in under 60 days, with Assist and AI writing, cut ticket volume by 45 percent year over year.
- Practical next steps: pick one or two agent use cases with clear benefit, clean the data path for them, set up leader-led adoption, and formalize agent governance from day one.

CHRO Advantage: Unlocking Agility, Unleashing Human Potential

HCM

Speakers

Kunal Sethi (Metronic), Aashna Kircher (Workday), Ashley Goldsmith (Workday)

Why This Session Matters

This session sets a people-first, AI-enabled agenda for CHROs. It explains how HR can redesign work with agents, improve productivity and talent outcomes, and manage risk without adding complexity. If you lead HR or HRIS, you will get a clear playbook for where to start, how to measure ROI, and how to bring your organization along.

What Was Covered

Workday framed the CHRO as a "Chief Work Officer," responsible for blending human strengths with AI. The mindset shift is human and AI, not human or AI. Three pillars guide adoption: boost productivity by removing repetitive tasks; amplify talent potential with coaching and decision support; mitigate risk with guardrails and controls.
A live scenario showed how an organization like Club Med could operate with agents across HR. Sentiment Agent identifies issues and triggers a targeted survey; Job Architecture Agent cleans duplicate jobs and creates new profiles, even for emerging roles like pickleball; Workday Wellness connects benefits, engagement data, and a partner ecosystem to recommend programs and estimate costs for the CFO; a self-service agent explains payslip changes; managers use Performance Agent to gather feedback and map it to roles; Paradox automates interview scheduling by matching calendars; executives ask natural language questions to model rewards and costs in seconds.
The roadmap emphasizes strong data foundations and connected experiences, including Workday Wellness, social sign-on, WhatsApp for candidates, and a strategic partnership with DailyPay for earned wage access. Paradox joined on stage to highlight quick-win areas like interview scheduling at scale. A customer dialogue with Medtronic outlined an ambitious program, 200 agentic use cases across HR with a

goal for 80 percent of HR processes to be AI-enabled, measured through clear leading and lagging indicators. The session closed with a preview of Sana's AI-native learning experience, positioned to complement Workday Learning.

Key Announcements & Takeaways

- Role of the CHRO is expanding; prioritize east-west influence across the business while Workday reduces north-south admin load.
- Adoption mindset, focus on human and AI together; design work so agents and people collaborate end to end.
- Three outcomes to target first:
    - Productivity, automate repetitive tasks for HR, managers, employees.
    - Talent amplification, give managers "an HRBP in the pocket" for guidance and quality decisions.
    - Risk mitigation, reduce payroll leakage and processing errors with controls and anomaly detection.
- Agents shown in action: Sentiment, Job Architecture, Performance, Self-Service for pay questions, Interview Scheduling via Paradox, Executive "ask and model" scenarios.
- Workday Wellness, a connected benefits and wellness layer that personalizes employee experience and quantifies business impact for leadership.
- Data foundation matters; prepare job architecture, skills, and partner integrations so agents can act with confidence.
- Medtronic blueprint to copy: build an interconnected pool of AI use cases, not ad hoc pilots; set an ambitious coverage goal; define ROI metrics per use case upfront; example, payroll reconciliation agent measures runs, issues flagged, and accuracy.
- Change and adoption, engage leaders early with tangible value they can reinvest; communicate often to build psychological safety and upskilling paths.
- Start now with a high-impact, low-effort use case; interview

scheduling is a proven fast win that builds momentum.

- Learning front door, Sana will complement Workday Learning with an AI tutor and collaborative authoring, supporting daily engagement and multi-language content at scale.

Reshaping the Office of the CFO Through Human-AI Partnership

Finance

Speakers

Zane Rowe, Andrew Kershaw, Tim Wakeford, Babs Lanier, Julie Gonzalez (Workday)
Brad Haupt (Monument Health), Chantal Adam (Salesforce)

Why This Session Matters

Finance leaders are moving from reporting the past to shaping the future. This session shows how AI agents, automation, and new partnerships raise control, speed, and insight across accounting, FP&A, revenue, and procurement. If you own finance transformation, you will find concrete use cases and metrics you can apply now.

What Was Covered

The vision, a human-AI partnership where agents handle noise and finance teams focus on value. Workday outlined a path to go beyond compliance, beyond efficiency, and beyond insights. The roadmap combines product innovations with an ecosystem of partners to modernize close, revenue, OTC, contract management, risk, and planning.

A live scenario with Belmond brought the pieces together. Intelligent intake routed a natural-language request to the right supplier and auto-created a PO. Contract Intelligence flagged non-standard terms and proposed redlines. A Financial Test Suite monitored controls, paused risky invoices, and recommended new tests from the marketplace. A Revenue Contract Agent parsed a multi-year contract, set billing and revenue schedules, and posted journals. FP&A agents detected margin pressure, suggested mitigations, and rolled forward a new projection in minutes. Cost and Profitability Management allocated indirect costs down to the lowest unit of production with an AI configuration assistant. Org modeling and predictive forecasting connected workforce design to financial impact.
The panel closed with practitioner advice, start now, experiment with real use cases, free time for forward-looking work, and engage teams

early to build skills and trust.

Key Announcements & Takeaways

- Clear north star, CFOs become architects of value while agents orchestrate complex processes in the background.
- Three lenses for your roadmap, trust and governance beyond periodic audits, precision operations beyond manual effort, and proactive insights that change tomorrow's results.
- Ecosystem moves
  - Banking liquidity, tax, e-invoicing, and disclosures through partners such as Kyriba, Avalara, Vertex, Thomson Reuters, and Workiva.
  - Supplier risk with Relish IQ and Dun & Bradstreet.
  - Trintech with Workday to modernize close in FSI.
  - Zuora with Workday for B2C OTC in tech and media, plus a Deloitte accelerator to speed adoption.
- Contract lifecycle and intelligence, new CLM and Contract Intelligence powered by Eversort, with reported gains such as 65 percent faster processing and up to 70 percent lower external legal spend.
- Procurement intelligent intake, natural-language requests, policy checks, supplier suggestions, PO creation, and first-request compliance that can cut maverick spend by up to 90 percent.
- Financial Test Suite, always-on tests for fraud, anomalies, and compliance. Agents hold suspect invoices, draft supplier communications, and suggest controls. Co-innovation with KPMG and a marketplace for standardized and custom tests.
- Revenue Contract Agent, reads complex contracts, populates headers, creates schedules and journals. Testing shows above 95 percent accuracy, with early adopters live.
- FP&A agents, detect drivers behind plan variances, generate mitigations, and produce updated projections tied to live financials.

- Cost and Profitability Management, AI-assisted sub-GL allocations to unit economics, testable before commit. Co-development with partners such as PwC for industry models.
- Org modeling and Predictive Forecaster, design new teams in natural language, see cost and headcount impact instantly, and update forecasts with market and transactional signals.
- Practitioner guidance, pick one or two high-impact use cases and start, measure leading and lagging indicators, address skills and change management early, and use quick wins to build momentum.

Accelerating CIO Transformation with an AI-First Open Platform for Work

IT

Speakers

Rani Johnson, Peter Bailis, Dean Arnold, Joe Lee, Gabe Monroy (Workday)
Penelope Prett (Accenture), Richard McColl (Google), William Compton (Pfizer)

Why This Session Matters

CIOs are moving from managing applications to orchestrating human plus AI systems. This session outlines how Workday's open, governed platform helps IT lead that shift, from agent lifecycle management to interoperability with major ecosystems. If you own platform strategy, integrations, or AI governance, this gives you the blueprint and proof points.

What Was Covered

Workday positioned "next-gen ERP" as people, money, and agents, built on an open platform that remains secure and governed. The product focus spans two tracks, first-party agents that drive outcomes in HR and Finance, and an open toolset so customers and partners can build their own. Highlights included Frontline Agent results, BP Optimize insights, and the path to manage agents like digital workers through an Agent System of Record.
The platform story emphasized speed and openness. Workday Build brings Flowise Agent Builder, Extend, Orchestrate, a developer copilot, and Data Cloud with live SQL and zero-copy analytics. API coverage is expanding across REST, GraphQL, MCP, A2A, JDBC, and Iceberg. Google joined to describe Agent Space and an interoperability protocol so agents across platforms can collaborate. A live demo showed building an event operations agent that pulled data from RainFocus, analyzed with Claude and Gemini, created assignments via MCP, sent SMS notifications, registered value in the Agent System of Record, and exposed analytics. A customer panel closed with practical guidance on governance at fleet scale and change management.

Accelerating CIO Transformation with an AI-First Open Platform for Work

IT

Key Announcements & Takeaways

- Workday agents are delivering measurable gains now.
  - Frontline Agent, text an absence, auto-propose coverage plans; early access shows over 90 percent time savings for managers.
  - Paradox in recruiting, example result at Chipotle, time to hire cut from 12 to 4 days while doubling applicant volume.
  - BP Optimize Agent, benchmarks tenant business processes and recommends fixes; single recommendations delivered 3,500 hours saved per quarter and up to 90 percent efficiency gains.
- Open, governed platform for builders.
  - Workday Build with Flowise Agent Builder, Extend, Orchestrate, and developer copilot to go from idea to production faster.
  - Data Cloud supports zero-copy analytics and direct SQL on Workday data.
  - Expanded standards and APIs, REST, GraphQL, MCP, A2A, JDBC, Iceberg, to integrate cleanly with your stack.
- Agent System of Record (ASOR) is central.
  - Registry, access control, lifecycle, and analytics for all agents, not only Workday's. Track outcomes and costs, not only usage.
  - Google, Microsoft, and others integrating with ASOR to provide enterprise-grade governance across ecosystems.
- Interoperability by design.
  - Google Agent Space lets enterprise agents collaborate, with an open protocol so Workday agents can work with partner agents.
  - Practical cross-system flows, hiring and onboarding, procurement requests, event operations, built and governed in one place.
- Ecosystem momentum.
  - 500+ partners building on Workday. Agent Partner Network has grown by more than 50 partners since June. Marketplace supports one-click installs.

What's New

Latest capabilities across HR and Finance modules

Want to innovate faster? Explore the Marketplace and try out Built on Workday

Built on Workday lets partners build apps inside the Workday platform. These apps use the same security, data model, and UX. The Workday Marketplace makes it easy to discover, buy, and deploy these app.

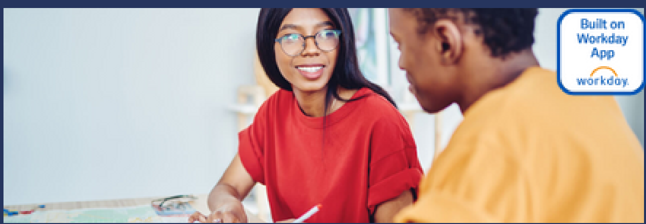
At Incubane, we design Built on Workday apps that streamline end-to-end processes, remove point solutions, and improve employee experience.

Clarity Personality Assessment

A personality profiling app based on the widely recognized four-color model. Users complete self-assessments to gain personal insights, while managers access team profiles to improve collaboration and leadership.

AI Powered Goal Setting

With AI Powered Goal setting you can set, track, and achieve goals with AI-powered guidance. This app helps employees and managers draft and refine their goals, align with business objectives, and get real-time AI coaching.

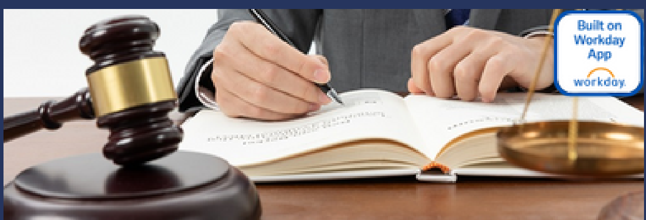


Advanced AI Check-Ins

Advanced Check-Ins enhances Workday's native features and brings structure, consistency, and insights to every manager-employee conversation. Whether it's a weekly 1:1, ongoing performance or a group project update.

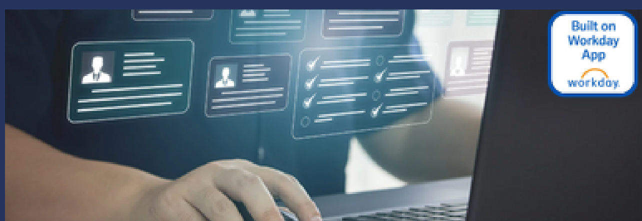
360 Feedback

Our 360 Feedback app makes it simple to collect feedback from peers, direct reports, managers, and even externals, all natively in Workday. A modern, structured way to gain deep insights and drive growth.



Permanent Education Tracker

Whether you're a CPA, lawyer or consultant, keeping your professional license up-to-date is non-negotiable. This app helps individuals and organizations stay on top of Continuing Education (CPE/CLE/CPD) requirements.



AI Prompt Library

Workday AI Prompt Library centralizes approved AI prompts in one place. Teams can find, use, and govern prompts directly inside Workday. You get consistent outputs, lower risk, and faster adoption of AI across your organization.

What's New: Core Workday Human Capital Management

HCM

Speakers
Melissa Bond, Shannon Clark (Workday)

Why This Session Matters
Core HCM is the backbone for most HR processes. When it is faster and more adaptable, managers finish tasks on time, HR spends less on support, and data quality improves. This session lays out what is live now and what is coming next across productivity, job architecture, and AI, so HR leaders and HRIS teams can plan upgrades and get value quickly.

What Was Covered
The session followed a simple playbook: unlock productivity, turn vision into reality, then use AI to scale. Recent releases add real gains for admins and managers, from Writing Prompts in rich text fields to a new HCM Admin Hub and a larger Manager Insights Hub. The roadmap accelerates mass changes and reduces rework with out-of-order job changes and AI that prevents duplicates at the source.

A major theme is job architecture. New AI helps standardize job descriptions and spot similar roles, while a Job Architecture Hub brings insights and actions together. The team also previewed agentic capabilities that automate routine HR lifecycle work, plus targeted investments in compensation and compliance to keep data clean and decisions fair.

Key Announcements & Takeaways
- Unlock productivity, available or imminent
    - Workday Writing Prompts (25R2)
        - AI inside more than 20 tasks across Core HCM, Compensation, Benefits, and Time Tracking.
        - Proofread, shorten, or adjust tone directly in the rich text editor; opt out in tenant setup if needed.

What's New: Core Workday Human Capital Management

HCM

  - Address validation expansion
    - Suggested addresses shown at entry, now covering 100+ countries for cleaner downstream data, including payroll.
  - Assign Roles, Add or Remove Security task refresh (25R2)
    - Faster load and flexible view, filter inactive assigners or scope to org or location to finish changes faster.
  - HCM Admin Hub (25R2)
    - One starting point for common configuration tasks across HCM, Talent, Recruiting, Compensation, Benefits, Time, Absence, and Scheduling.
    - Dynamic by security, admins only see tasks they are allowed to manage.
  - Manager Insights Hub expansion
    - Adds contingent worker info, time tracking and scheduling, calibration, career pathing, plus quick actions for matrix orgs and hire.
  - Employment verification service (US payroll, with Innovation Services)
    - Instant verifications for mortgages, loans, and credit checks to reduce HR workload.
  - Onboarding Plans
    - Live since 25R1; 25R2 adds Bulletins as content.
    - 26R1 plans include manager visibility and automated nudging for overdue tasks.
- Transform vision into reality, job and org changes at scale
  - Change Job enhanced UI adoption
    - By 26R1 all customers move to the new template-based experience for simpler transactions and more manager self-service.
  - Mass Change Jobs
    - New mass action UI with validations and contextual security; process up to 5,000 transactions in one run.

What's New: Core Workday Human Capital Management

- Out-of-order Change Jobs
  - Insert a job change before later-dated events (including terminations and org changes).
  - Controlled by security, supported in UI, EIB, and Mass Change Jobs; targeted as early as 25R2+.
- Org chart clarity
  - Collapsible panel shows matrix orgs, managers of multiple orgs, and workers with multiple positions.
  - Simple opt-in via tenant setup.
- Multiple jobs for contingent workers (25R2)
  - Track contingent workers with more than one position using the same add or end additional job framework as employees.
- Find Similar Jobs on creation or edit (25R2)
  - AI surfaces possible duplicate job profiles in real time; requires Innovation Services and a new security domain.
- Coming focus areas in job architecture
  - Job profile restricted visibility: limit profiles to company, country, supervisory org, or a combination.
  - Job profile variances: discovery in progress to handle nuanced differences by country or business area.

- Unleash transformative potential with AI and Illuminate
  - AI-generated job descriptions (25R1)
    - Create standardized, meaningful descriptions using public data and your recruiting posts where available.
  - Job Architecture Hub (25R2)
    - Insights to action in one place: Find Similar Jobs, Data Gap Detection, ML-relevant fields, market skills benchmarking, and Skills-based Operational Analytics.
    - Filter by business unit or country to focus work and split analysis across teams.

What's New: Core Workday Human Capital Management

- Agentic HR vision, automate the repetitive and raise the floor on data quality
  - HR lifecycle agent
    - Companion for hiring, change job, offboarding, and HR service delivery with intelligent error handling, automated entry, and review support.
  - Foundation investments
    - Job architecture: identify redundancies and propose structure changes.
    - Compensation: support fair pay decisions linked to job function.
    - Compliance and reporting: real-time alerts and audit signals to catch issues early.
  - Future accelerators
    - Organizational Foundation Agent: propose architecture changes from a business goal, then guide the rollout conversationally.
    - Mass Action Accelerator: find the right population and apply bulk changes through a guided flow with review and approval.
    - Retroactive Event Manager: a copilot to flag overlaps or conflicts across past and future-dated events, and guide safe corrections.
- Practical next steps for customers
  - Turn on Writing Prompts in preview, test with HR, Rewards, and Recruiting content owners, then define opt-out rules.
  - Enable Address Validation where you pay people, then expand globally; measure error reduction in payroll returns.
  - Stand up the HCM Admin Hub and Manager Insights Hub; publish quick links and short how-to clips to drive adoption.
  - Pilot Mass Change Jobs on a contained scenario, for example cost center realignment or location updates, then scale.
  - Use Find Similar Jobs and the Job Architecture Hub to clean duplicates and fill gaps before peak hiring.

- Prepare for out-of-order Change Jobs with clear security groups and guidance for HRBPs.
- Nominate a design group for agent use cases in hiring and change jobs; capture baseline time and error rates to show ROI.

What's New: Global Payroll Connect

HCM

Speakers
Maggie Hoang (Workday)

Why This Session Matters
Global payroll is complex and risky, especially when you run many countries and vendors. This session shows how Global Payroll Connect (GPC) centralizes operations in Workday, reduces manual work, and adds AI to speed decisions. It is useful for HRIS, payroll leaders, and anyone planning a multi-vendor payroll model.

What Was Covered
GPC provides a unified payroll experience with near real-time, bidirectional APIs to payroll vendors. The goal is to move teams from manual data chasing to higher-value work, while keeping the experience inside Workday for both employees and payroll practitioners.

Recent releases focused on the Global Payroll Hub and process control. Teams can see end-to-end vendor status in one place, manage pay run checklists with owners, dates, and attachments, and create an audit trail. Additional Payroll Data lets vendors surface non-native forms directly in Workday, now available pre-hire, during termination, and on mobile, with file upload. A new feature captures legally required signatures on payslips and other payroll documents in Workday. External Payroll Input gained reasons, source IDs, and reporting fields to analyze last-minute changes. There are also PG enhancements, including benefit data and clawback tracking. First AI features include suggested pay periods to close.

Looking ahead, Workday will auto-report historical changes after pay group moves, expand Data Changes on Demand to time tracking and time off, and support field overrides. For US and Canada, withholding forms from Experian will surface in Workday based on location, then export to vendors. AI will power employee questions on payslips through Ask Workday. For practitioners, the Global Payroll Hub Companion aims to approve payroll, run variance analysis, and update checklists without leaving Workday. To cut deployment effort, Advanced Pay Component Management will import vendor earnings and deductions and suggest mappings, while the GPC Configurator will replicate configurations for new countries and pay groups. Workday is certifying partners against a complete feature set to ensure consistent capabilities at one cost.

Key Announcements & Takeaways

- Unified control: Global Payroll Hub shows cross-vendor status in one place, with checklists, owners, due dates, links to vendor tasks, and attachments.
- Employee and practitioner in sync: Additional Payroll Data surfaces vendor forms inside Workday across hire, termination, and mobile, with document upload.
- Compliance built in: In-Workday review and signature for payslips and tax documents meet local legal needs, removing side processes.
- Better last-mile controls: External Payroll Input adds reason codes, external IDs, and reporting fields to track and fix late changes.
- PG and recovery data: Benefit plan details, clawback dates, and external cost fields improve downstream vendor alignment and error recovery.
- AI for payroll operations: Suggested pay periods to close help prevent misses, with more AI coming for variance analysis and task execution in the Hub Companion.
- AI for employee questions: Ask Workday will explain payslip items using the payslip, external payroll results, and your own knowledge articles.
- Fewer deployment hours: Advanced Pay Component Management imports vendor E&D and suggests mappings to comp, benefits, and time plans.

What's New: Global Payroll Connect

HCM

- Faster country rollouts: GPC Configurator replicates setups and can automate new pay group creation and typical tasks for expansion countries.
- Historical fixes made easier: System will report changes after pay group moves with a configurable lookback window, reducing manual correction work.
- Data Changes on Demand growth: Time tracking and time off supported by December, with field overrides coming in 26R1.
- US/Canada forms path: Experian-powered withholding forms appear in Workday based on location and export to your vendor.
- Partner readiness: Certification requires full feature coverage at one cost, so customers get a consistent experience across vendors.

What's New: Workday AI Agent Builder, Presented by Flowise

HCM

Speakers
Jerry Ting, Joe Lee (Workday), Hengry Heng (Flowise)

Why This Session Matters
Many teams are experimenting with agents across different platforms, but struggle to build, govern, and maintain them inside enterprise processes. This session explains how Workday's Agent System of Record, Agent Gateway, and Flowise make agents part of your workforce, not side projects. It is useful for CIOs, HRIS leaders, and builders who want secure, observable agents that act with Workday context.

What Was Covered
The session reframed agents as teammates that operate within Workday's data and business context, with value tracking and lifecycle management. Workday positions three layers: Workday-built agents, customer-built agents with Flowise (low code), and no-code personal automations with Sana, plus interoperability with external platforms.

A live build showed Flowise creating a Time Off agent in minutes and a more complex "request corporate card" agent that reads policy via RAG, provisions a card in Stripe, and records company property in Workday. Flowise provides versioning, human-in-the-loop, observability, and evaluations so teams can move from demo to production. Agents can be run where users work, for example Google Agent Builder, Slack, or Teams, while Agent Gateway centralizes secure access to Workday APIs and emerging agent protocols.

Key Announcements & Takeaways
- Agents as workforce: Agents are modeled as teammates with org context, telemetry, and value-based metrics like hours saved.

What's New: Workday AI Agent Builder, Presented by Flowise

HCM

- System of record for agents: Single pane for usage, governance, and ROI across Workday-built, customer-built, partner, and external platform agents.
- Agent Gateway: Unified access to 3,500+ REST and SOAP APIs, WQL, RaaS/Graph, AI Gateway, and modern protocols such as MCP and Google's agent-to-agent.
- Flowise is open source: Large ecosystem of models and tools, visual builder, and portability to run agents in Workday and third-party surfaces.
- Enterprise controls: Versioning, RBAC, SSO, human approvals, observability, and testable evaluations to reduce hallucinations and drift.
- Practical demo patterns:
  - Simple pattern, Time Off agent: check balances, collect dates, submit request.
  - Complex pattern, Corporate Card: fetch worker data, summarize expense policy with RAG, provision card in Stripe, register asset in Workday, notify stakeholders.
- Reduce maintenance risk: Standard tooling and evaluations help teams sustain agents beyond the initial build, not depend on single developers.
- Open ecosystem stance: Workday integrates with Microsoft, Google, AWS agent platforms while consolidating value and control in Agent System of Record.
- Roadmap signal: Flowise is being integrated into the Workday developer experience, with availability targeted in the first half of next year for Workday Extend Pro customers.

What's New: Workday Compensation

HCM

Speakers
Kimberly Johnson, Michelle Cohen (Workday)

Why This Session Matters
Compensation is a major share of operating cost and regulatory pressure is rising. Teams need faster, safer ways to manage changes, guide managers, and stay compliant across countries. This session shows what is new and what is next in Workday Compensation, with practical changes you can use in upcoming releases.

What Was Covered
The session focused on three themes: balance flexibility and control at scale, deliver a simpler manager and admin experience, and stay competitive and compliant. Recent updates remove blockers in core processes, modernize the UI, and bring compensation tasks into the places managers already work. Roadmap items add AI for compliance and decision support, stronger security, and better market data inside Workday.

Highlights include simultaneous compensation changes, cleaner rehire handling, and powerful document generation with Docs for Layouts. A new enhanced UI for compensation processes and an improved Compensation Review experience go live in 25R2, with adoption required by 26R1. Manager Insights Hub becomes the one stop for compensation. AI helps with writing in rich text fields today and will power review insights next. On compliance and competitiveness, Workday adds granular security, masking options for total rewards, and native access to market data through Compa. New agent capabilities will monitor minimum wage changes and guide updates, while pooling and budgeting become more flexible for global needs.

What's New: Workday Compensation

HCM

Key Announcements & Takeaways

- Simultaneous comp changes: Process multiple compensation changes for the same worker at the same time, with security controls.
- Cleaner rehires: Prior compensation is hidden during Hire for rehires to prevent "zombie pay" confusion while keeping history intact.
- Docs for Layouts upgrades: Custom conditions and document subtotals reduce complex calculated fields and cut templates.
- Roadmap, process control: Out of order Change Job lets you insert events before completed ones, also via EIB and Mass Change Job.
- Minimum Wage Agent: AI monitors legal rate changes, estimates impact, and guides updates for frontline workers without needing Workday Payroll.
- Docs for Layouts roadmap: Change data source on copied templates, better translations, higher batch limits beyond 50k statements.
- Calculated non-funded pools: More control over promotion, lump sum, and adjustment pools by country, level, or rules. New IVCs support the math.
- New compensation UI (25R2): Modernized experience enables advanced features and consolidated Hire. Optional to disable only until 26R1.
- Compensation Review UX (25R2): Clearer org summary, labeled actions, simpler issues handling, and auto-enable in production.
- Manager Insights Hub: Configurable "Compensation" page with quick links, reports, dashboards, and announcements for one-page navigation.
- AI writing prompts: Proofread, shorten, and change tone in rich text across about 20 HCM tasks, including total reward statements.
- Coming AI insights: Summaries for approvers, variance and budget impact during review, and a compensation agent to reduce analysis time.
- Security hardening: Fixes for event visibility, rule-based security to hide own row in reviews, and stronger domain controls.

What's New: Workday Compensation

HCM

- Total rewards masking choice: List card is default in 25R2. Switch back to the visualization wheel if you prefer.
- Market competitiveness: Compa Analyst agent and Compa Connector bring market pay insights into offers, reqs, and adjustments inside Workday.
- Pay transparency prep: New partner app from Kainos will help address EU pay equity and transparency requirements from 2026

What's New: Workday Help

HCM

Speakers
Shannon Clark, Marc Healy (Workday)

Why This Session Matters
HR service delivery is under pressure to resolve questions faster, deflect cases, and keep knowledge fresh. This session shows how Workday Help is scaling with AI, better case controls, and stronger knowledge tooling. It is useful for HRIS leaders, HR operations, and knowledge managers who want measurable gains in deflection, time to resolve, and content quality.

What Was Covered
Workday shared a year-in-review and the roadmap for Help. Adoption has grown to 1,500 customers with strong use of generative AI for drafting and translating knowledge. Reported outcomes include a 56% average case deflection rate, 36% faster time to resolve, and 2 million article views across about 20,000 articles. Partnerships are expanding to support extensibility and governance.

Near term, Help improves efficiency in three areas: case management, knowledge authoring, and analytics. Case solvers get a customizable workspace, AI case summarization, ownership transfer after creation, and safeguards for emails with ambiguous owners. Authors get bulk article upload from DOC/DOCX, scheduled publish and expiry, article approvals, and clear article ownership. Case conversations gain rich text formatting and configurable display of solver names to keep communication in official channels. SLA reporting becomes more precise with resumed timers on reopen and true business-time calculations.

Looking ahead, Workday outlined two agents. The Self-Service Agent (targeted for 26R1) answers questions and completes tasks directly in Workday, using tenant context and knowledge articles, with future connectors to SharePoint, Google Drive, and Box. The Case Agent will automate classification, assignment, resolution assistance, and trend analysis so teams spend less time on triage and more on proactive improvements.

Key Announcements & Takeaways

- Scale and results: 1,500 Help customers; 56% average deflection; 36% faster time to resolve; 2 million article views.
- Case workspace upgrades: Add columns like flags, labels, and location to sort and filter work the way teams operate.
- AI case summarization: One-click summaries to speed handoffs and reduce reading time; can store as internal notes.
- Ownership controls: Transfer case ownership post-creation, including to external contacts, to avoid duplicates and keep history.
- Email ambiguity guardrail: Automatically flag cases where the owner is unclear when created by email.
- Knowledge at speed: Bulk upload up to 100 articles from DOC/DOCX; schedule publish and expiry to manage lifecycle.
- Quality and accountability: Article approval workflow and named ownership to tighten reviews and updates.
- Better conversations: Rich text formatting in case messages and notes; configure how solver names appear to employees.
- SLA accuracy: Resume timers on reopened cases; report true elapsed business time with hours of operation and on-hold pauses.
- Self-Service Agent vision: Conversational answers and task completion inside Workday using tenant context and knowledge, with external content connectors planned.
- Case Agent vision: Intelligent classification and assignment using workload and SLA signals, resolution suggestions from knowledge and similar cases, and analysis to surface content gaps.
- Practical outcome: More deflection, faster resolutions, cleaner metrics, and a clear path to agent-assisted HR service delivery.

What's New: Workday HiredScore AI

HCM

Speakers
Jason Scheckner, Muli Farkas (Workday)

Why This Session Matters
Hiring teams face talent scarcity, shifting role requirements, and pressure to do more with less. Many AI efforts start small and fail to show ROI, which slows adoption and trust. This session focuses on outcome-driven AI for talent acquisition and mobility, with explainability, governance, and orchestration across processes so HR can deliver measurable impact.

What Was Covered
The speakers outlined why AI initiatives stall, then showed how Workday and HiredScore approach fixes: target high-impact outcomes, connect to business goals, rely on solid data foundations, and bake in change management and explainability. With Workday as the operating base, agents and AI features span recruiting, internal mobility, and workforce continuity, moving from linear processes to orchestrated flows.

Live examples and roadmap items included proactive talent discovery inside Workday, explainable scoring for recruiters, and routing near-miss applicants to better-fit roles. They showed collaboration in Microsoft Teams that speeds hiring manager reviews, plus “course-correction” recommendations that switch strategies when postings underperform. For employees, a career guide proactively recommends internal roles and development paths while respecting mobility policies and manager involvement. A Continuity Agent, now in early use, identifies roles at risk, builds backfill plans before a requisition opens, and can cut time to fill to near zero. A Future of Jobs concept will model how roles evolve to link workforce plans with real hiring signals.

What's New: Workday HiredScore AI

HCM

Key Announcements & Takeaways

- Outcome first: Prioritize AI use cases that move core metrics, not just easy wins; tie to business goals and approval paths.
- Proven impact baselines: Customers see up to 2.3x internal mobility, 54% recruiter productivity gains, and 70% of jobs covered by existing talent pools.
- Fetch inside Workday: Proactive rediscovery of past applicants, CRM leads, and employees directly in the Workday UI to cut time to first qualified candidate.
- Expanded sourcing: Ability to surface curated external lead pools for hard-to-fill roles to accelerate hiring when inbound is thin.
- Contingent reach: HiredScore signals extend into contingent hiring to reduce agency spend and cycle time.
- Explainable AI: Recruiters see the “why” behind candidate scores (A–D) to build trust, improve feedback, and drive adoption.
- Talent routing: When rejecting an applicant, route them to better-fit open roles and invite to apply, improving candidate experience and conversion.
- Manager–recruiter in flow: Teams-based collaboration reduces manager review time by about 35%, with one-click actions and conversational guidance.
- Strategy “course correction”: Detect underperforming postings and switch to proactive sourcing or alternate workflows automatically.
- Employee Career Guide: Proactively suggests internal moves and learning paths, honoring mobility policies and enabling manager-moderated flows when needed.
- Continuity Agent: Identifies risk roles early, prepares backfills, tracks plan health, and can achieve “left-of-req” hiring for near-zero time to fill.
- Future of Jobs (early): Predicts role evolution to align workforce planning with live market and internal signals.
- Change management built in: Explainability, intuitive UX, and orchestrated agents reduce trust barriers and sustain momentum beyond the first use case.

What's New: Workday Human Capital Management Core Reporting and AI

HCM

Speakers

Kristin Vonheeder, Kenny Thai (Workday)

Why This Session Matters

Core reporting sits at the center of Workday decision making. Every customer uses it, with over 20 million monthly users running more than 6 billion reports. This session explains how reporting is shifting to a simpler, visual, and AI-assisted experience so HR, HRIS, and leaders get to answers faster and with less admin overhead.

What Was Covered

Workday's vision is an intuitive, visual, and AI-powered reporting experience embedded in Workday. For authors and admins, a new Analytics & Reporting Hub centralizes tools and tasks. AI will assist with data source and field recommendations so authors start with the right objects and prefilled columns. For consumers, conversational reporting lets users ask questions in plain language and move from data to decision in seconds.

Recent and near-term features streamline authoring, reduce search time, and improve governance: curated field lists, centralized prompt-set management, visibility into calculated field usage, and mass copy for composite report rows. On the consumption side, trend worker data now spans 72 months, large matrix reports can run in background and still open interactively, and facet usability has improved. New chart types arrive, with a roadmap for richer visuals, interactivity, and branding. Dashboards will see performance gains, tab-level security, and higher content density, setting the stage for a more flexible, story-driven analytics experience.

Key Announcements & Takeaways

- Vision and AI
  - Conversational reporting: ask in plain language, keep context across questions, move to actions next.

  - AI data recommendations (authors): suggest data sources and fields, prebuild the initial report layout.
- Authoring and Admin Efficiency
  - Analytics & Reporting Hub (25R2): one place for reports, calc fields, prompt sets, tags, Prism/OX links, and admin dashboards.
  - Curated field lists (25R2): limit visible fields by business object to speed build time, with an author override toggle.
  - Centralized prompt-set management (25R1): create, edit, and track reuse from a single task.
  - Calculated fields maintenance (25R1): see usage hierarchy and properties to convert report-level to system-level safely.
  - Mass copy, composite rows (25R1): copy complex rows across reports in one step.
- Consumer Experience and Insight
  - Trend Worker data to 72 months (25R2): longer lookbacks for headcount and workforce trends, configurable periods.
  - Scheduled live matrix reports, View in Browser (25R2): run heavy reports in background, open interactively with drill and expand.
  - Prompt limitations (26R1): authors restrict selectable prompt values to the right subset, speeding execution.
  - Facet improvements (25R2): sort facet values, and deselect after Select All in search reports.
- Visuals and Dashboards
  - New charts: Waterfall (25R2) and Heatmap (25R2+).
  - Roadmap: Funnel, Scatter, Geomaps; richer interactions like data labels and formatting.
  - Branding (26R2): custom color palettes and dashboard look-and-feel controls.
  - Dashboard upgrades (26R1): performance improvements, tab-level security, and more than six worklets per tab.
- Roadmap for Conversational Reporting
  - Today: core NLQ with clear answers. Next: better visuals, navigation to related reports, and in-context actions.
  - Future: collaborative exploration, dynamic parameter changes, narratives, and proactive insight surfacing.

What's New: Workday Journeys

HCM

Speakers
Luka Hunter, Marian Klander (Workday)

Why This Session Matters
Employee experience impacts productivity, retention, and compliance, yet teams are stretched and employees navigate many systems. Workday Journeys aims to give guided, personalized support at scale for moments that matter, from onboarding to change and compliance. This session covers what is new, what is next, and how AI will reduce admin effort while improving outcomes.

What Was Covered
The team reviewed current business impact and adoption, then detailed recent releases and the forward roadmap. Journeys now supports manager clarity through Support Journeys, easier reuse with custom templates, and fast global rollout with AI translations and in-editor previews. Self-service journeys let employees opt in for sensitive or preparatory topics, while a new public API enables distribution from external triggers.

They explained how Journeys and Onboarding Plans fit together. Onboarding Plans focus only on new hires with stages, preboarding notifications, and a dedicated homepage card. Journeys cover broader use cases, remain self-paced, offer templates, and are designed for continuous curation. Customers can surface Journeys inside Onboarding Plans to centralize the new-hire experience. For extensibility, Extend Cards can be embedded directly in journeys to display data and launch actions from Extend apps. Looking ahead, Workday plans search across assigned and self-service journeys, distribution from all business processes, mobile feature parity for frontline users, a new report step type, and discovery work on completion tracking, content progression controls, archiving, and richer reporting. The closing vision, Illuminate for employee experience, outlines AI that detects guidance needs from tenant signals, accelerates curation and translation, enables on-the-fly distribution, and continuously optimizes content with measurable outcomes.

Key Announcements & Takeaways

- Scale and results: Over 1,500 customers. More than 25 million journeys distributed and 9 million monthly interactions.
- Support Journeys (25R1+): Managers supporting multiple employees through the same journey see who each journey applies to, with direct distribution from BPs, Mass Operation Management, and ad hoc.
- Custom templates: Turn effective journeys into reusable templates, then localize or tailor by team or location.
- AI translations: Automatically translate journeys into Workday languages with reviewer and approver controls. In-editor translation preview available. General availability targeted for 26R1.
- Self-service journeys: Publish a library employees can start themselves for confidential or pre-work topics, such as parental leave or internal mobility.
- Journeys + Onboarding Plans: Use Plans for the new-hire lifecycle (stages, preboarding notifications, homepage card). Use Journeys for ongoing topics like benefits, culture, wellbeing, probation. Surface relevant Journeys inside Plans to centralize access.
- Extend Cards in Journeys (25R2): Embed Extend data and actions as simple or list cards. Example, show remote work days used and link to the Extend app to act.
- Public distribution API: Trigger and distribute journeys from any external system. Example, after badge provisioning in ITSM, auto-start a workplace access journey.
- Search for journeys: Employees and admins will be able to search assigned and self-service journeys by title and welcome message.

What's New: Workday Journeys

HCM

- Distribute from all business processes (26R1): Support for all HCM, Financials, Student, and Extend BPs, removing current limits.
- Mobile parity: Bring desktop end-user features to mobile, including branding on steps, documents as a step, Support Journeys, Extend Cards, manager tracking, and self-service.
- Report step type: Add Workday reports as a native step without external links.
- Discovery areas:
  - Automatic completion tracking for Learning and Workday tasks to improve compliance and reporting.
  - Content progression controls to enforce timing and dependencies between step groups and steps.
  - Archiving old journeys to declutter workspaces and reduce distribution risk.
  - Deeper reporting to identify impact and where to iterate.
- Illuminate vision for AI:
  - Detect guidance opportunities from tenant signals such as searches, tickets, sentiment, and compliance gaps.
  - Hyper-personalize audiences and accelerate curation with sourced content and translation.
  - Distribute in the moment based on user context and preferred engagement times.
  - Continuously measure outcomes and suggest improvements, starting with assistive recommendations for existing journeys.

What's New: Workday Learnings

HCM

Speakers
Rob Kime, Michael Goldberg (Workday)

Why This Session Matters
Learning drives skills, compliance, and productivity. Many teams need stronger admin tools, better mobile use, and a scalable way to connect third-party content. This session explains how Workday Learning is investing in core LMS features, AI, and open integrations so you can modernize without adding more systems to manage.
What Was Covered

Workday outlined a clear strategy: connected, intelligent, personalized learning with strong admin efficiency. The team is rebuilding key flows like assignments and observational checklists, improving mobile, and expanding reporting and governance. A deeper partnership with Sana brings AI content creation, assessments, insights, and an AI tutor that can sit alongside courses, speeding time to value.

Extensibility was a major focus. Learning signals already surface across Workday (Talent, Journeys, Help, Onboarding, Inside Hub), and new vendor-agnostic REST APIs let you sync catalogs, assignments, enrollments, progress, and completions with external tools. Cloud Connect for Learning continues to grow, with normalized Skills Cloud tagging from content partners, recertification options for external content, and a simple path for any vendor to join. Engagement Builder supports targeted communication with audience, schedule, and content controls, with more channels and global time zone support on the roadmap.

Key Announcements & Takeaways

- Core LMS improvements
  - Assignments rebuild (26R1): separate assignments and enrollments, flexible security and validation, mass assignment,

    - multi-course tasks, custom notifications, optional completion.
    - Enrollments: auto-enroll to digital courses and programs, simpler tasks and dashboards for admins, managers, and learners.
    - Observational checklists, phase 2 (26R1): mobile-first consumption, per-step reporting, large assessor pools (up to 50,000), rule-based assessor eligibility.
- AI and the Sana partnership
    - AI content creation and inline assessments for courses.
    - AI tutor to support learners inside courses.
    - AI insights and discovery layered on Workday Learning with Workday compliance controls underneath.
- Extensibility and APIs
    - First new REST API delivered in 25R2, more coming next year for catalogs, assignments, enrollments, tracking, and completions.
    - Lesson-level tracking for content consumed outside Workday when the source can send data back.
    - APIs available to customers, partners, and via Extend to build custom integrations.
- Engagement Builder
    - Targeted campaigns with Audience Builder, scheduling, and content selection for learning and beyond.
    - Roadmap includes global time zone support and additional notification channels such as SMS (26R1).
- Cloud Connect for Learning (CCL)
    - Skills Cloud normalization: partners updating tagging so Workday can ingest skills from external content at scale. OpenSesame first to go live after 25R2; LinkedIn Learning near completion, others to follow.
    - Recertification for external content: program-based approach to reset certification dates (26R1).
    - Simple vendor path: any provider can join CCL through Workday Alliances and standard APIs.
    - Deprecations: legacy YouTube integration removed in stages through next September; legacy Skillsoft (pre-Percipio)

- integration end-of-life, Percipio in CCL continues.
- Experience and discovery
  - Commitment to a more modern, mobile-friendly UX for search, curation, and parity between desktop and mobile.
  - External link improvement: capture completion data when the destination system can return it.
- Bottom line
  - Strong reinvestment in compliance and assignments, practical AI through Sana, and an open ecosystem to reduce custom one-offs while keeping control in Workday.

What's New: Workday Payroll for North America

HCM

Speakers
Amy Mazurik, Yamuna Kannan (Workday)

Why This Session Matters
Payroll in the US and Canada changes fast, with complex rules and rising fraud risk. Teams need safer controls, fewer manual corrections, and quicker answers. This session explains what is new in 25R2 and what is coming next, so payroll, HRIS, and finance can run with more control and less effort.

What Was Covered
The team set the context with four product principles, experience, efficiency, insight, and compliance. They then walked through 25R2 highlights, including effective dated tax authority exceptions to avoid retro-impact when laws change, custom validation for payroll input to enforce who can post which pay components, and automatic retro statutory holiday pay for Canada. Shared recoup arrears limits cap benefit arrears recovery per check to protect employees, payslips by organization gives HR partners secure view-only access without broad domain rights, and additional payment election security reduces bank account change fraud by verifying the existing account before edits. Workday also announced an Equifax connector to streamline employment and income verification.

They explained the compliance lifecycle and volume of updates shipped across US and Canada, then noted the US HR1 bill focus areas, no tax on tips and overtime, with guidance timelines and contributed solutions. The roadmap section covered payroll accounting reallocation and a redesigned accounting adjustments flow to simplify retro-costing fixes, a deeper Experian integration that embeds location-based withholding forms in Workday using Additional Payroll Data and business processes, and a stronger Global Payroll Hub that adds Workday payroll pay groups and checklists. Finally, they outlined

What's New: Workday Payroll for North America

HCM

AI and agent plans, including an FLSA and FSB configuration helper with tenant-aware guidance, a Minimum Wage Compliance Agent, skills that watch for missing payment elections and tax authorities, auto-maintenance of expiring FLSA calendars, conversational payment election for employees, payroll input guidance for managers, and natural language payroll data insights for fast answers.

Key Announcements & Takeaways

- 25R2, effective-dated tax authority exceptions: Configure state, provincial, local exceptions by date without re-opening past payrolls.
- 25R2, custom validation on payroll input: Enforce rules on who can enter specific pay components, with hard-stop errors when violated.
- 25R2, Canada, retro stat holiday pay: System auto-recalculates holiday pay after retro comp changes, no manual spreadsheets.
- 25R2, shared recoup arrears limit: Cap total arrears recoup per pay period, for example 10 percent of gross, to avoid paycheck shocks and meet new mandates.
- 25R2, payslips by organization: HR partners gain secure, view-only access based on org role, fewer escalations, printing stays with payroll roles.
- 25R2, additional payment election security: Require re-entry of existing account or IBAN before edits, with lockout rules and guided help text; web services follow in 26R1.
- Equifax verification connector: Reduces manual effort for employment and, with US payroll, income verification; available at no additional Workday cost for eligible customers.
- Compliance operations: Continuous monitoring and same-day service updates across one code line; high annual update volume for US and Canada.
- US HR1 focus: No tax on tips and overtime provisions tracked; current form impacts and contributed solutions called out, with more to follow as regulations finalize.

What's New: Workday Payroll for North America

- Roadmap, accounting corrections: Payroll accounting reallocation to back out and repost to the right grant, cost center, or project; redesigned accounting adjustments for scale and clarity.
- Roadmap, Experian withholding in Workday: Embedded federal, state, and local forms based on location, using Additional Payroll Data and Workday BPs to cut manual entry.
- Global Payroll Hub growth: Add Workday payroll pay groups and build native checklists in the hub to manage end-to-end tasks in one place.
- FLSA and FSB tool (26R1 target): Tenant-aware, AI-driven configuration help that surfaces the right admin guide content in context.
- Agent skills for compliance and efficiency:
  - Minimum Wage Compliance Agent, watches changes, estimates cost, prompts comp updates, and nudges employees on elections.
  - Watchers for missing data, payment elections and tax authorities, find gaps and pre-populate tasks with human approval.
  - Auto-renew expiring FLSA work period calendars 90 days before expiry.
  - Conversational payment election, guides employees through bank changes.
  - Payroll input assistant, helps managers with one-time payments and tax effects; routes to payroll for approval.
  - Payroll data insights, natural language Q&A over payroll data for quick audits and leadership questions.

What's New: Workday Peakon Employee Voice

HCM

Speakers

Rich Davenport, Michael Auchenberg (Workday)

Why This Session Matters

Organizations face rapid change and rising expectations on engagement, retention, and manager effectiveness. Peakon Employee Voice shows how continuous listening, AI, and tighter integration with Workday can turn feedback into action at scale. This is relevant for HR leaders, HRIS teams, and people managers who want measurable impact on attrition, productivity, and culture.

What Was Covered

The session opened with research insights. Strategy communication is a top driver of engagement across demographics, yet frontline managers often struggle during transformation. Career growth signals are weakening, with lower promotion and internal mobility, which links to higher high-performer attrition. Customer stories showed outcomes from moving to continuous listening, such as reduced voluntary turnover, higher eNPS, and faster survey completion.

Peakon's recent features focus on speed to insight and scale: rule-based questions for precise timing, AI translations for global comments, AI comment summarization at survey close, and on-demand summaries for any segment. The roadmap centers on three themes. Flexibility adds custom drivers, per-driver and per-question frequencies, new ESG and ANCC Magnet Nursing Excellence question sets, and a percent-favorable scoring option. Seamless connectivity strengthens data flows with Core HCM, People Analytics (Vibe), Manager Insights Hub, Prism, Workday Wellness, and post-exit surveying via personal emails. AI-powered insights expand with AI Topics, AI Recommendations, AI support to build custom drivers, and a new Employee Sentiment Agent that can listen, analyze, and suggest or trigger actions, including cross-agent workflows like launching targeted learning.

What's New: Workday Peakon Employee Voice

HCM

Key Announcements & Takeaways

- Research highlights
  - Strategy is a critical engagement driver; managers need help during change.
  - Promotion rates are down across most industries; internal mobility is falling; high-performer attrition is rising.
- Proven impact examples
  - Continuous listening linked to lower turnover, improved eNPS, and large ROI in composite models.
  - Manager behaviors matter: more acknowledgements and replies to critical comments, higher action completion.
- What's new in product
  - Rule-based questions to control timing for onboarding, exit, and other moments.
  - AI translations for all comments, plus automatic comment summaries by promoter/detractor groups.
  - On-demand summarization for any segment to go from thousands of comments to themes in seconds.
- Flexibility roadmap
  - Custom drivers to combine questions across sets and your own items, with bespoke dashboards.
  - Individual frequencies at driver/question level for truly continuous listening.
  - New question sets: ESG (live) and ANCC Magnet Nursing Excellence (26R1).
  - Percent-favorable scoring to present results simply while keeping 11-point scale collection.
- Connectivity roadmap
  - Hourly Core HCM sync in; data out to Vibe dashboards, Manager Insights Hub, and Prism.
  - Workday Wellness integration to measure ROI of wellbeing programs using Peakon signals.
  - Post-exit surveys using personal emails pulled from HCM to capture cleaner feedback.

What's New: Workday Peakon Employee Voice

HCM

- AI-powered insights
    - AI Topics to cluster comments without fixed categories, reducing export needs and privacy risk.
    - AI Recommendations to surface the single most important focus area per leader.
    - AI assistance to build custom drivers by suggesting the right questions.
    - Employee Sentiment Agent to answer questions, detect shifts, send targeted surveys, and suggest or trigger actions, including handoffs to other Workday agents.
- Bottom line
    - Continuous, well-timed listening plus AI-driven analysis and integrated actions leads to faster decisions, visible manager follow-through, and measurable improvements in engagement and retention.

What's New: Workday Scheduling & Labor Optimization

HCM

Speakers
Jin Wang, Tiffany Ringenbach (Workday)

Why This Session Matters
Frontline turnover is high and compliance rules are tightening. Managers need faster scheduling tools, automated compliance, and a better mobile experience for workers. This session shows practical upgrades that cut manual work and reduce risk while improving coverage and employee experience.

What Was Covered
The team framed Scheduling and Labor Optimization as part of a unified Workforce Management suite with Time, Absence, and Scheduling working together. They shared adoption and impact, over 150 customers live, millions of shifts generated, and heavy mobile use. Then they demonstrated new compliance controls such as auto-generated short breaks, student and minor labor rules with school calendars, and predictive scheduling penalties driven by centralized reason codes.

Efficiency features focused on manager time savings. Multiple role assignments let the optimizer schedule up to four roles per day for a worker, with meals and breaks placed automatically. Mass shift actions allow bulk add, edit, and delete of hundreds of shifts in one flow. Gaps in coverage got a new visual view that links demand and assigned shifts so managers can fix under or over staffing in seconds. The roadmap highlighted forecasting using machine learning, seniority-based scheduling, schedule filters and favorite views, hybrid and incremental scheduling, meal and break recommendations for manual shifts, and new frontline agent skills for both managers and workers.

What's New: Workday Scheduling & Labor Optimization

HCM

Key Announcements & Takeaways

- Compliance automation
    - Auto-generate short breaks based on configured rules; system staggers breaks to maintain coverage.
    - Minor and student rules with school calendars, maximum hours by in-session and out-of-session, and work-session rules.
    - Predictive scheduling penalties, centralized reason codes determine if penalties apply and flow to payroll.
- Manager time savings
    - Multiple role assignments, schedule up to four roles per day per worker; optimizer minimizes gaps and auto-places meals and breaks.
    - Mass shift actions, bulk add, edit, or delete up to roughly 350 shifts in one guided flow with compliance checks.
    - Gaps in coverage enhancement, interactive graph to spot under or over staffing and add or adjust shifts directly from the view.
- Forecasting and optimization (roadmap)
    - Forecasting GA targeted for 26R1, feed key business metrics such as sales or footfall into ML to predict demand and generate staffing.
    - Regenerate or adjust predictions for events and weather; support for new locations with limited history.
    - Hybrid scheduling, combine static pattern calendars with labor demand; incremental scheduling to re-optimize only the part you choose.
- Scheduling controls and UX (roadmap)
    - Seniority-based scheduling with weighted fields and tie-breakers; show seniority on the schedule.
    - Schedule filters and favorite views, save AM/PM or line-specific views and reuse across schedules.
    - Meal and break recommendations for manual shifts to keep managers compliant without guesswork.

What's New: Workday Scheduling & Labor Optimization

HCM

- Frontline agent skills
  - Manager skills to run mass schedule edits with a single instruction via Ask Workday on mobile.
  - Worker skills to view schedules, update preferences, and change availability in one place.
- Adoption proof points
  - 150+ customers live; over 3 million shifts generated last year; more than 80 million mobile schedule views, confirming strong mobile demand.

What's New: Workday Talent Acquisition

HCM

Speakers
Jamie Moore, Twila Long (Workday)

Why This Session Matters
Talent teams face tighter budgets, skills gaps, and higher candidate expectations. This session shows how Workday is using AI and tighter platform integration to speed hiring, improve quality, and reduce risk. It is useful for TA leaders, HRIS teams, and hiring managers who want practical gains without adding tools to manage.

What Was Covered
The team framed a human-centered hiring journey across four personas, recruiter, candidate, hiring manager, and interviewer. They showed how new AI skills in Recruiting reduce steps like creating requisitions and building interview teams, while Manager Insights Hub becomes the one stop for managers to act.

On the candidate side, Workday is removing friction with social sign-in, stronger resume parsing, single-page apply, mobile assessments, and personalized job insights that compare a resume to a posting and suggest better-fit roles and next moves. For recruiters and teams, HiredScore Fetch is embedded into the candidate grid to rediscover past applicants, prospects, and internal talent without switching systems. Interviewers can submit feedback in Slack, and hiring managers see AI summaries of strengths and risks to decide faster. The platform roadmap focuses on compliance, privacy, and extensibility, including GDPR controls, fraud detection signals, pay transparency by location, and deeper APIs. Paradox is joining the portfolio to strengthen conversational apply and scheduling once the acquisition closes.

What's New: Workday Talent Acquisition

HCM

Key Announcements & Takeaways

- AI for recruiters and managers
    - Job Requisition skill, conversational backfill creates the job in minutes and routes for review.
    - Interview Team Optimization, recommends qualified interviewers, reduces fatigue and bias; both in early adopter.
    - GenAI job descriptions available today and follow approvals if you lock profiles.
    - Manager Insights Hub, central place to hire and manage with more TA actions coming.
- Candidate experience upgrades
    - Social sign-in with Google and Apple in preview, LinkedIn planned.
    - Apply with AI and single-page apply, faster flow with improved resume parsing.
    - Candidate Insights, shows fit to the job, skills match, and suggested roles, builds trust and signals mobility.
    - Mobile assessments supported, touchless offers possible for high-volume roles.
- Recruiter workspace and sourcing
    - Embedded HiredScore Fetch live, source and manage applicants in one grid, internal and historical leads first; external CRM leads next via early adopter.
    - Interview feedback in natural workspaces like Slack; AI-summarized feedback for managers.
    - Campaigns and events to nurture silver medalists, matching audiences with HiredScore planned.
    - WhatsApp messaging in development, target GA early next year.
- Reliable and resilient core
    - EU support for Paradox Olivia on Career Site.
    - GDPR controls, constrained prospects by country in preview; consent tracking for campaign analytics targeted for 26R1.

Next-gen confirmed opt-in to reduce email bounces and spam risk.

- Fraudulent applications, discovery and signal-based detection for identity theft, embellished credentials, and bot spam.
- Purge plans for job applications; pay transparency by location for US states and EU directive.
- Continued accessibility investments across Career Site and Candidate Home.

- Product philosophy and outcomes
    - Build for measurable value, time to fill, quality of hire, and candidate satisfaction, not just features.
    - Responsible AI, privacy, and extensibility first, with APIs for Extend and partner solutions.
- Paradox direction
    - Definitive agreement signed, deeper use of conversational apply and interview scheduling planned post-close.

What's New: Workday Talent Optimization and Skills Cloud

HCM

Speakers
Caroline Agin, Angela Chau (Workday)

Why This Session Matters
Retention, mobility, and manager effectiveness are under pressure. Teams need a connected talent system that uses real data and AI to drive action, not more portals. This session shows how Workday is evolving Talent Optimization and Skills Cloud to boost growth, reduce attrition, and make managers faster without adding extra tools.

What Was Covered
Workday's vision is an intelligent, connected talent platform that turns strategy into execution across agile performance, talent development, and talent mobility. The team shared outcomes seen across customers, 24% lower voluntary turnover, 81% higher internal mobility, and about $1.7M in annual savings from retention.

Recent and near-term features center on practical AI in the flow of work. For managers, Talent Highlights and Manager Insights Hub bring genAI summaries and calibration tasks into one place. For employees, AI helps write better feedback and goals, and generates development items tied to skills, role, and career paths. Career Pathing gains sharing to managers plus company-defined paths with APIs to enforce strategy. Mobility expands with suggested projects in Opportunity Marketplace and a redesigned HR Partner experience for succession planning, with genAI and HiredScore suggestions on the roadmap.

Skills Cloud strengthens the data foundation. Structured assessments at scale feed a new AI-powered Skills Fit Analysis report, delivered skill categories simplify discovery and reporting, and a centralized Job Architecture Hub brings prompts and insights to keep roles and skills current.

What's New: Workday Talent Optimization and Skills Cloud

HCM

Finally, the team outlined agent plans, a Performance Agent to draft evidence-based reviews, and a Workforce Continuity Agent to predict risk and keep pipelines warm, plus agents for job architecture, skills, and talent profiles.

Key Announcements & Takeaways

- Agile performance
  - Talent Highlights, genAI summaries of strengths and opportunities in Manager Insights Hub.
  - Calibrations inside Manager Insights Hub with prompts, history, and quick actions.
  - Feedback help, suggestions using the Situation–Behavior–Impact model and Generate Anytime Feedback to beat the blank page.
  - Goals help, Generate Goal Description from title and context, plus Suggested Goals based on prior goals, org goals, and job.
- Talent development
  - Onboarding, ML suggests coworker connections and pulls new hires into Career Hub to capture skills early.
  - GenAI Development Items for employees, near-term parity for managers to propose targeted growth actions.
  - Career Pathing, employees can share paths with managers; company-defined career paths with APIs to set allowed lateral and promotional moves (26R1).
- Talent mobility
  - Opportunity Marketplace, suggested projects for faster staffing and growth assignments.
  - Succession in HR Partner Hub, centralized plans, insights, actions, and freshness prompts; roadmap for HiredScore-based candidate suggestions, genAI summaries, and plan-level notes.
  - Flex Teams, genAI description drafting and better skill tagging to improve matching; upcoming OOB analytics for internal apply and fill rates, skills supply vs demand.

What's New: Workday Talent Optimization and Skills Cloud

HCM

- Skills Cloud and job architecture
  - Structured skill assessments at scale, up to about 50,000 workers per run via Mass Operation Management.
  - Skills Fit Analysis, AI report to compare skill sets, find gaps down to worker level; embeddable in HR Partner and Job Architecture hubs.
  - Delivered skill categories and groups to standardize capture and enable roll-up reporting.
  - Job Architecture Hub, prompts and insights to keep roles, skills, and market signals aligned; upcoming skill detail pages with descriptions, related skills, and opportunities.
  - Open ecosystem, certified partners to ingest skills from external systems while keeping Workday the source of truth.
- Agents and AI direction
  - Performance Agent, drafts objective, data-backed reviews from Workday and third-party signals, keeps human in the loop, reduces bias.
  - Workforce Continuity Agent, monitors risk on critical roles, proposes successors, orchestrates actions, and tracks succession health in collaboration with HiredScore.
  - Foundation agents, job architecture, skills, and talent profile agents to keep demand and supply signals current for faster workforce decisions.
- Bottom line
  - A single system for performance, growth, mobility, and skills, powered by AI and agents, helps retain talent, speed decisions, and turn talent strategy into measurable business outcomes.

What's New: Workday Time Tracking and Workday Absence Management

HCM

Speakers

Andrew Gossett, Sahar Salek (Workday)

Why This Session Matters

Time and absence sit at the heart of frontline operations, compliance, and payroll accuracy. Small friction, like slow approvals or confusing calendars, creates overtime, errors, and attrition. This session highlights practical updates that cut clicks, improve mobile use, and harden compliance, useful for HRIS, payroll, operations, and frontline managers.

What Was Covered

Workday outlined a worker-to-manager flow that reduces friction and improves accuracy. For workers, a new Time Management Hub centralizes time entry, absence, and schedule in one place. Flexible check-in and checkout with thresholds improves capture on mobile and desktop. Third-party scheduling integration pre-fills clock-in fields, and the Workday Time Kiosk now supports Android tablets and attestation. Absence got simpler with start and end times defaulting from schedules, plus correct handling when requests cross midnight.

Managers gained a unified cockpit via Manager Insights Hub, now integrated with Time and Scheduling, and a full mobile Edit and Approve Time experience to act on the go. Admin improvements include custom additional fields on leave types to meet local rules, document generation on absence business processes, automated payout for expiring accruals, segmented security for time entry codes, and the mandatory new Absence Calendar. Professional services teams get a faster Enter Time by Type experience with inline edits, powerful search and bookmarking, safeguards that require negative offsets instead of deletions, and the option to hide sensitive time types in Inbox approvals. Looking ahead, Frontline Agent skills will automate absence reporting and shift coverage, enable bulk shift and time approvals, and map spreadsheet time to projects with confidence scoring. Access frictions will drop with SMS one-time passwords, and support for WhatsApp is planned.

Key Announcements & Takeaways

- Worker efficiency
  - Time Management Hub, one place for time, absence, and schedule.
  - Flexible check-in and checkout with tenant-set thresholds.
  - Scheduling integration pre-fills fields at clock-in; fewer physical clocks needed.
  - Workday Time Kiosk on Android; attestation support in 25R2.
  - Absence start and end times default from schedules; midnight-crossing requests handled as one.
- Manager productivity
  - Manager Insights Hub integrates Time and Scheduling with actionable reports.
  - Edit and Approve Time on mobile, full desktop parity for quick fixes and approvals.
  - Edit and Approve report can show scheduled hours next to reported time for faster review.
- Compliance and admin control
  - Custom additional fields on leave types to capture jurisdiction-specific data.
  - Document generation on absence business processes to standardize letters and notices.
  - Automated payout for expiring accruals to reduce manual work and risk.
  - Segmented security for time entry codes, hide what a worker should not use.
  - New Absence Calendar moves to production for all customers; Copy Leave Type task speeds setup.
- Professional services time entry
  - Enter Time by Type (new) with inline edits, totals, fast search, and bookmarks.

  - Prevent deletions after billing; require negative offsets for auditability.
  - Option to hide time type in Inbox for sensitive projects and tasks.
- Agents and what is next
  - Frontline Agent, SMS absence reporting, auto-replacement from Scheduling, bulk shift adjustments, bulk approvals.
  - Spreadsheet-to-time import, map CSV or Excel to projects and tasks with confidence scores.
  - SMS one-time passwords for limited self-service access; WhatsApp channel planned.
  - Platform links, schedule tags to work tags, position-based work schedules and time calculations, expanded purge options, and extend leave actions.

What's New: Workday VNDLY

HCM

Speakers
John Adkins, Steven Middleton (Workday)

Why This Session Matters
Contingent labor programs are growing in cost and complexity. Leaders need a single view of all non-employees, tighter controls on time and invoicing, and a simpler experience for managers and vendors. This session explains what is new in Workday VNDLY and what is next, with a focus on faster time to value, total workforce visibility, and global program control.

What Was Covered
The speakers outlined three pillars for VNDLY's roadmap, accelerate time to value, total workforce management, and global program optimization. A major update is the unified Worker Profile Management model that now sits under Extended Workforce, Statement of Work, and Worker Profile tracking, giving one data set for reporting, governance, and vendor collaboration. Managers get contingent insights inside Workday's Manager Insights Hub, so approvals, tenure risks, budgets, and end dates sit next to employee tasks.

Time and invoicing investments centered on transparency and scale. A configurable calculation engine exposes and controls how bill rates are built, including premiums, overtime, and rounding. Unit based time entry and a new monthly timesheet experience address regional needs, while billing cycles by criteria let programs automate weekly and monthly invoicing in parallel. File based bulk updates speed mass data changes, and system agnostic procure-to-pay APIs keep budgets and approvals in sync with finance systems. Program teams gain practical admin upgrades, quick search in settings, expanded role based access policies, cross-user visibility into bulk updates, and flexible delegations to cover approver absences. Looking ahead, a Contingent Sourcing Agent will grade applicants and rediscover proven talent, and monthly timesheets will add prorating and rules for Asia-heavy populations.

Key Announcements & Takeaways

- Unified data and UX
  - Worker Profile Management now underpins all VNDLY modules, enabling a single worker list, consistent actions, and cross-module reporting.
  - Vendor–manager co-creation of worker profiles moves email back-and-forth into an auditable flow.
  - Manager Insights Hub embeds contingent dashboards and actions in Workday, including approvals, end-date alerts, tenure risk, and budget tracking.
- Time, rates, and invoicing
  - Custom system calculator builds transparent bill rates with configurable components and rounding; click-through breakdowns on invoices.
  - Unit based time entry (whole, half, quarter days) plus a new monthly timesheet with week tabs, review, and submit flows.
  - Billing cycles by criteria automate weekly and monthly invoices by location, vendor, or job category.
- Scale operations
  - File based bulk work-order updates for many fields across many workers in one load with preview and error reporting.
  - System agnostic P2P APIs to align PR, PO, receipts, and invoices, and keep budgets and approvals in sync.
- Program governance and admin speed
  - Settings search with metadata to find the right config quickly.
  - Role based access policies to show or hide data by module and workflow step, for example hiding vendor identity until hire.
  - Delegations that cover approver absences on a date range or indefinite basis.
  - Program-wide visibility into all bulk updates, not only the initiator's actions.
-

What's New: Workday VNDLY

HCM

- Roadmap highlights
  - Contingent Sourcing Agent, applicant grading and talent rediscovery to shortlist faster and re-engage proven workers.
  - Monthly timesheets with prorating rules and tighter links to the new billing cycles for Asia and other monthly markets.
- Bottom line
  - A single contingent backbone, embedded in Workday for managers, with transparent rates, flexible time capture, and automated invoicing. Programs gain control at scale while vendors and managers get a simpler, faster experience.

What's New: Workday Wellness and Workday Benefits

HCM

Speakers

Paula Kaplan, Luke Egenolf (Workday)

Why This Session Matters

Benefits are expanding fast and getting harder to manage, with many vendors, complex setup, and low employee awareness. Workday is reframing benefits as a platform, not just plan setup and enrollment. This helps HR reduce integration work, gives partners a faster way to connect, and delivers a unified employee experience that drives utilization and better outcomes.

What Was Covered

The session introduced Workday Wellness as an expansion of Workday Benefits, focused on an ecosystem approach. A new wellness exchange platform enables “pre-connected” integrations so partner systems can act as if they are the same system, sharing data securely in real time. Use case management lets you turn partner capabilities on quickly, like plan setup automation, worker data sharing, and error handling inside Workday.

On the employee side, Workday is building guided, connected experiences. Decision support will use Ask Workday and the Self-Service Agent, starting with healthcare and expanding to other plan types. Vendors will publish dynamic program cards and wallet items via API, while processes such as Evidence of Insurability and connected absence become streamlined with real-time updates. For insights, a new Wellness Insights Hub brings together four data types, native Workday enrollment data, ecosystem benchmarks, Peakon wellbeing signals, and partner-contributed usage data. Agents will sit on top so HR can ask questions in natural language and act, including discovering new partners in a marketplace and onboarding them in days.

What's New: Workday Wellness and Workday Benefits

HCM

Key Announcements & Takeaways

- Platform shift
  - Wellness exchange platform with "pre-connection" to partners for secure, real-time data flow.
  - Use case management to enable specific partner capabilities quickly, no lengthy custom integrations.
- Faster partner onboarding and setup
  - Plan setup automation generated by partner policy systems, about 70 percent of fields prefilled; supports your calculated fields.
  - Worker data and enrollment use case with partner data error management, errors return to Workday at worker or plan level and route for fix.
- Unified employee experience
  - Decision support via Ask Workday and the Self-Service Agent, in and outside enrollment, starting with healthcare then expanding.
  - Program cards and Digital Wallet powered by partner APIs; admins review and publish on the homepage, Benefits & Pay Hub, or confirmations.
  - Evidence of Insurability modernized, start EOI during open enrollment with real-time status updates, fewer files and manual steps.
  - Connected absence, unified request flow using APIs and SSO across multiple leave providers, fewer emails and handoffs.
- Content and translation with AI
  - Generate benefits knowledge articles from your configuration, review, publish, and auto-translate to supported languages.
- Wellness Insights Hub
  - Four data types in one place, Workday native data, ecosystem benchmarks (opt-in), Peakon wellbeing signals, and partner-contributed usage data.
  - Ask questions of the data with Workday's agent layer, move from insight to action without new dashboards.
  - Marketplace link from insights to discover relevant partners,

   - then onboard using plan setup automation and use case management.
- Scale and readiness
   - Built on top of Workday Benefits used by 3,500+ customers; designed for many vendors and dozens of plans per tenant.
   - Significant 25R2 capabilities are built, moving from build to implementation with partners.

What's New: Financial Reporting

Finance

Speakers
Aidan Mitchell, Derek Gee (Workday)

Why This Session Matters
Financial reporting must serve many personas, from IT authors to controllers, AP/AR, FP&A, and executives. The session explains how Workday is simplifying authoring, adding AI for faster answers, and improving performance at scale. If you build or consume financial reports in Workday, these updates reduce maintenance, speed analysis, and strengthen governance.

What Was Covered
The team organized updates under four themes, infuse intelligence, accelerate authoring, amplify insights, and manage data. Intelligence focuses on natural language search, conversational analysis, and AI data findability that suggests the right data source and fields, then scaffolds a report for you. Authoring investments center on a new Analytics & Reporting Hub, plus time savers for composite and matrix reports like dynamic controls, mass copy of rows, and centralized prompt-set management.

Amplify Insights brings scheduled outputs that open interactively in the UI, collaboration on composite reports with comments and refresh-in-place, and new visuals such as waterfall and heatmap. Manage Data introduces Business Views, curated, performant data sources that join and union financial objects for common use cases like supplier contracts and purchase items. Early adopter views expand across journals, invoices, projects, and more, with a projects cost view that cuts build time from hours to minutes. Office Connect gains more dimensions, hierarchies, models, and deeper Accounting Center support.

What's New: Financial Reporting

Finance

Key Announcements & Takeaways

- Infuse intelligence
  - Natural language report search improves findability based on names, fields, and data sources.
  - AI data findability recommends the best data source and fields, then prebuilds the report shell.
  - Conversational analysis on existing reports answers follow-up questions, shows reasoning, and supports full-screen exploration.
- Accelerate authoring
  - Analytics & Reporting Hub (25R2) unifies report writer, discovery boards, Prism, worksheets, calc fields, prompt sets, tags, and admin dashboards.
  - Composite report authoring, Dynamic Display-By lets one definition serve multiple company hierarchies; Mass Copy moves composite rows across reports to enforce consistency.
  - Prompt-set management centralizes creation, reuse, and impact analysis.
  - Dynamic Control Fields allow authors to enable end users to choose up to five worktags at runtime, reducing variants.
- Amplify insights
  - Schedule to "View in Browser" for composite and matrix reports, keep drill and interactivity without exporting.
  - Composite report collaboration, comment on cells, notify owners, refresh data, and keep an audit trail inside Workday.
  - New visuals, Waterfall and Heatmap available in reports and dashboards, with more presentation upgrades planned.
  - Analytic Dimensions map Prism or Accounting Center attributes into reportable dimensions with hierarchies for grouping, filtering, and prompts.
- Office Connect enhancements
  - More scale, 25 optional dimensions total and 20 alternate hierarchies; up to 3 reporting models; 5 historical years.
  - Accounting Center support delivers drill to high-volume operational detail with strong performance.
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What's New: Financial Reporting

Finance

- Manage data with Business Views
    - Business Views are curated, performant data sources that blend complex objects into a single, business-friendly model.
    - Delivered in 25R2, Supplier Contract Activity and Purchase Item Order Metrics, answer questions like PO and receipt coverage, invoice status, and controlled spend under contract.
    - Configure Delivered Business Views task lets you add or hide fields, rename, and adjust descriptions without calc-field sprawl.
    - Early adopter pipeline includes nine additional views across cash, revenue, supplier invoices, purchase orders, expense reports, and journal and journal lines.
    - Project Costs Business View unifies expense reports, POs, supplier invoices, time, and adjustments by project; typical build drops from 12 hours to under 10 minutes and can surface directly on the project page.
    - Roadmap, build-your-own Business Views (26R1 EA target) to let customers join and union Workday objects for tailored reporting models.

What's New: Invoice to Pay and Cash Management

Finance

Speakers

Hamnad Shah, Raymond Chow (Workday)

Why This Session Matters

Invoice to Pay and Cash Management drive working capital, compliance, and vendor relationships. Many AP and treasury teams still rely on manual steps and bank portals, which slows close, adds risk, and hides cash visibility. This session focuses on practical automation, AI, and global standards that cut effort, speed reconciliation, and improve control.

What Was Covered

The team framed three investment themes, efficiency, experience, and global. On AP, Workday is reducing manual touch points from capture to approval. Highlights include improved OCR, machine learning to link invoice lines to POs, and touchless routing for trusted suppliers based on configurable rules. For reviewers, field highlighting and a detachable attachment viewer speed validation. New reporting on match exceptions and defaults for freight placement help scale controls. 25R2 adds separate-payment flags and landed cost tax on freight and other charges.

On cash, Workday showed mature bank and settlement capabilities with high auto-reconcile rates and a push to do more in Workday instead of bank portals. Recent features include bank routing codes to steer payments, multi-currency company bank accounts, accepted-currency routing for supplier bank accounts, and ISO 20022 updates for payments, status, and statements. AI Bank Reconciliation moves to general availability with two parts, exception matching suggestions and recommended one-to-one rules. The roadmap adds a faster PO line-linking UI with recommendations, OCR page limit expansion,

What's New: Invoice to Pay and Cash Management

Finance

document classification to ignore non-invoices, touchless for services and non-PO invoices, scheduled settlement runs on business days, and expanded payment purpose codes for cross-border processing.

Key Announcements & Takeaways

- AP automation, from capture to approval
  - ML PO line linking matches invoice lines to PO lines; enables touchless approval for defined suppliers and thresholds.
  - Field highlighting maps Workday fields to PDF values; detachable attachment viewer supports dual-monitor processing.
  - Match exceptions historical reporting for analysis and process fixes.
  - Defaults for freight location (header or line) to remove a common blocker to touchless.
  - 25R2, separate-payment option on invoices and landed cost tax on freight and other charges.
- Cash management, scale and standards
  - Bank routing code, route by company account or worktag to avoid settlement overrides.
  - Multi-currency company bank accounts and accepted-currency routing for supplier accounts to reduce FX fees and rejections.
  - ISO 20022 updates, pain.001 v9, payment status reporting, camt.053 v8 (prior day) and camt.052 (intra-day) for reconciliation and cash positioning.
- AI Bank Reconciliation
  - Exception matching assistant suggests up to three reconciles based on historical patterns, saving manual research time.
  - Rule suggestions propose one-to-one matching rules to lift auto-match rates over time.
- Roadmap highlights
  - Enhanced PO line-linking workspace with side-by-side view and system recommendations.

- OCR page limit increase from 15 to 30 pages; document classifier to ignore signatures and statements.
- Touchless expansion, improved support for service PO invoices and non-PO invoices using historical learning and explainability.
- Scheduled settlement runs on business days only, honoring weekends and bank holidays.
- Payment purpose codes extended to miscellaneous payment requests and bank transfers to reduce cross-border rejections.

- Bottom line
  - Use touchless and ML linking to cut AP cycle time; standardize freight handling and landed cost tax.
  - Shift cash ops into Workday with multi-currency accounts, ISO updates, and AI-assisted reconciliation.
  - Adopt upcoming UI, OCR, and rule automation to scale globally with fewer exceptions and faster period close.

What's New: Expense to Reimburse

Finance

Speakers
Matthue Peck, Kristen Jacob (Workday)

Why This Session Matters
Expenses touches every traveler, approver, and AP analyst. Small frictions add up to lost receipts, slow reimbursements, and policy risk. This session lays out practical upgrades you can enable now and a clear roadmap for 26R1, focused on automation, insight, and compliance.

What Was Covered
Workday framed three investment themes, efficiency, insights, and compliance. Recent releases improve capture and controls, including a revamp of OCR for all languages and locales, automatic hotel itemization using enriched card data, Slack and Teams notifications that reach approvers in the flow of work, tax worktags and self-assessed tax handling for consistency with Financials, stronger security for corporate card connectors, and expanded GDPR purging for headers and profiles. Mobile gains an Expenses Hub as a single starting point.

The team previewed a new submitter experience targeting 26R1. Real-time card authorizations trigger instant prompts to add receipts and complete items on the spot. The redesigned entry flow puts automation at the center, matches receipts to card transactions, defaults the expense item, shows the receipt side by side with inputs, and asks the user to confirm accuracy before submit. Early adopters report better accessibility, fewer over-reimbursements from duplicate receipt and card entries, and faster cycle times. The roadmap extends real-time prompts to SMS and WhatsApp, delivers travel reconciliation across booking, card, and expense data, uses spend authorizations to auto-fill missing details, adds delegate “scan on behalf,” improves distance entry, and introduces cost allocation enhancements.

What's New: Expense to Reimburse

Finance

Key Announcements & Takeaways

- Efficiency and automation
  - Revamped OCR supports all languages and locales; pair with Expense Item Recommendations for best results.
  - Automatic hotel itemization from enriched card data, large time savings on the highest-effort expense type.
  - Real-time card authorizations, instant push prompts to upload receipts and complete expenses in the moment.
  - New submitter UX (26R1), automation first, side-by-side receipt, guided confirmations, desktop and mobile.
- Insights and flow of work
  - Workday Everywhere alerts for approvers in Slack and Teams; drop receipts in chat to OCR and file.
  - Mobile Expenses Hub centralizes tasks, receipts, and policy links.
- Compliance and controls
  - Tax worktags and self-assessed tax align Expenses with Supplier Invoices and journals.
  - Expanded GDPR purging now includes report headers, spend authorizations, and travel profiles.
  - Stronger security for corporate card connectors across billing accounts, cards, transactions, and files.
- What is coming next
  - Global channels for real-time prompts, SMS and WhatsApp.
  - Uber for Business integration targeted to start development; inbound data expansion continues.
  - Travel reconciliation, automatic match across booking records, card data, and expenses for true audit.
  - Use spend authorizations to auto-complete missing expense details.
  - Double down on OCR breadth over card L3 gaps to capture more detail reliably.
  - Delegate "scan on behalf," distance entry improvements, and cost allocation enhancements in design.
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What's New: Expense to Reimburse

Finance

- Adoption tips
  - Turn on Expense Item Recommendations and the OCR revamp now.
  - Enable Slack or Teams notifications for both submitters and approvers.
  - Standardize hotel itemization and define freight and tax rules for consistent accounting.
  - Prepare for 26R1 by reviewing security for card connectors and confirming purge policies.

What's New: Professional Services Automation Powered by Workday

Finance

Speakers

Gina Ketelhohn, Aaron Gray (Workday)

Why This Session Matters

Professional services firms need tighter quoting, faster staffing, cleaner execution, and billing that works worldwide. This session shows how Workday PSA connects the flow end to end, from Services CPQ to projects, forecasting, time entry, margin, and billing. It is useful for PSA leaders, finance, PMOs, and operations who want speed with control.

What Was Covered

The session followed four PSA pillars, Demand Management, Resource Management, Project Execution, and Project Billing. In demand, Services CPQ is now central, with phase and task level quoting, effort estimation in the catalog, smart copy from spreadsheets, and cross-opportunity quote copy. Resource Management added task-level forecasting with visual allocation signals, Illuminate-powered project roles in Career Hub, and a roadmap for more flexible resource pools.

Project Execution focused on creating the project plan directly from the quote WBS, a new project time entry task with powerful search, and automation to keep worksheet budgets in sync with scheduled mass updates. On analytics, Business Views arrive for project cost and are planned for project margin. Billing gained percent-complete-by-cost at phase or task level with drill to journals, simpler custom narration on invoice proposals, ad hoc transaction transfers, single-place daily-rate billing review, search by assignable role, and strong controls to prevent deletion of billed time. The roadmap closed with prepaid and progress bill flexibility, a personalized billing review grid, a new Workday Resource Scheduling product, and a change-order orchestration design program.

What's New: Professional Services Automation Powered by Workday

Finance

Key Announcements & Takeaways

- Demand management
  - Services CPQ GA, generate SOW, projects, resource plans, forecasts, and contracts from a quote.
  - Quote by phase and task; Services Catalog adds effort estimation by duration or phase.
  - Smart copy from complex spreadsheets into quotes; copy quotes across opportunities.
  - Future, push SOWs to CLM for redlining and e-signature, then continue the quote flow in Workday.
- Resource management
  - Task-level forecasting in the new Resource Forecaster UI with over/under allocation indicators and drill-ins.
  - Projects in Career Hub, match workers to project roles by skills; workers can express interest and trigger a BP.
  - Enhanced resource pools (roadmap), allow membership in multiple pools, person-level include/exclude, and controlled refresh.
- Project execution
  - Auto-create project plans from quote WBS at opportunity creation or conversion to full project.
  - New "Enter Time by Type" with bookmarks and an expanded search, filter by customer, project owner, project, and keywords.
  - Mass "lock workbooks" step to return plans from In Worksheets to Draft before scheduled budget mass updates.
  - Business Views, Project Cost in early adopter; Project Margin next, blending cost and revenue in one performant source.
- Project billing
  - Percent complete by cost at phase/task, plus drill to journals and a standard review report.
  - Invoice proposal, dedicated tab for custom objects to manage presentment text faster.
  - Transfer ad hoc project transactions across projects and tasks without reversals.

  - Daily-rate billing review consolidated into a single task.
  - Search WIP by assignable role and worker to speed reviews and transfers.
  - Time block deletion prevention, configurable stop rules by billing, revenue, or project status, with an override domain for admins.
- What's next
  - Prepaid and progress bill flexibility, raise a prepaid on the fly in invoice proposals, separate billing-schedule ownership, and better prepaid reporting.
  - Personalized billing review grid, dynamic totals and subtotals, pivotable columns, and saved layouts.
  - Workday Resource Scheduling, match by skills, availability, and preferences with tunable weights; utilization improvements planned.
  - Change order orchestration, end-to-end handling across quote, resources, plans, billing, and margin, with clear reporting on impact.

What's New: Record to Report and the Intelligent Data Core

Finance

Speakers

Joselynn Mena, David Haimes (Workday)

Why This Session Matters

Record to Report is where accuracy, controls, and speed meet. Many teams still chase intercompany mismatches, manual reconciliations, and audit requests across emails and spreadsheets. This session shows concrete 25R2 updates and new AI agents that automate matching, reconciliation, audit evidence, and the close itself. Finance, controllership, and accounting ops will find practical changes they can adopt quickly.

What Was Covered

The session opened with 25R2 enhancements that reduce friction in intercompany, funding, currency, budgets, and assets. Intercompany rules now balance across more worktags, reconciliation auto-matches system lines, and cross-currency netting reduces settlement volume. Funding sources support commitment and obligation ledgers for public sector. Controls tighten with approvals on recurring journal templates, and budgets gain options to prevent child amendments from inflating parents. On assets, custom depreciation conventions arrive next, with IFRS impairment and revaluation on the horizon.

The second half focused on AI and agents. A new AI-powered Account Reconciliation solution builds reconciliations from your existing setup files, assigns owners, and provides a single hub with aging and drill. A Financial Audit Agent monitors controls, detects risks, and compiles PBC evidence with a test marketplace from Workday, partners, and the community. A Close Agent will generate close task lists and owners, guide sequencing, close activity groups safely, and automate standard tasks like revaluations and report pack generation.

What's New: Record to Report and the Intelligent Data Core

Finance

Key Announcements & Takeaways

- Intercompany, 25R2
  - Balancing rule expanded to all balancing worktags, not only cost center.
  - Option to apply the rule only when company–cost center combinations are invalid.
  - Auto-match for intercompany lines with match IDs, including reversals; focus on exceptions.
  - Cross-currency intercompany netting before settlement, supports partial netting and country or currency exclusions.
- Funding, currency, journals, budgets, assets
  - Multiple funding sources support commitment and obligation ledgers; future, single funding source with multiple project limits.
  - 30 delivered cryptocurrencies added for reporting and tracking.
  - Recurring journal templates gain a business process, changes require approval to protect downstream automation.
  - Public sector budgets, prevent child amendments from auto-increasing parents; 26R1 adds summarized award-level budget check for virtual parent–child plans.
  - 26R1, custom depreciation rate conventions; future native IFRS impairment and revaluation lifecycle.
- AI-powered Account Reconciliation
  - New end-to-end solution, included in Financials; GA target 26R1.
  - Upload your current reconciliations setup from Excel, AI maps to Workday and creates reconciliations and assignments.
  - Reassignment respects HCM approvals and returns.
  - Hub with multidimensional support, aging, drill, commentary, and audit trail.
  - Roadmap, auto-reconcile subledgers, aging auto-decertification, and AI insights on write-offs.
- Financial Audit Agent and Test Suite
  - Continuous assurance, run policy, regulatory, and fraud tests 24x7; automate PBC evidence collection.
  - Oversight dashboard shows confidence scores, financial impact, and active tests.

    - Test marketplace with Workday, partner, and community tests; interactive Test Agent to author custom checks.
    - Early adopters live; GA target 26R1.
- Close Agent
    - Generates close task lists and owners; monitors prerequisites and nudges next actions.
    - Safely closes period activity groups after dependency checks; automates tasks like revaluations and report packs.
    - Early adopter in 26R1; broader availability planned for 26R2.
- Bottom line
    - Use 25R2 for immediate gains in intercompany and funding control.
    - Plan for 26R1 to adopt Account Reconciliation and the Audit Agent, then layer the Close Agent to shorten cycle time with stronger assurance.

What's New: Source to Pay

Finance

Speakers
Craig McFaydyen, Milind Penbhaje (Workday)

Why This Session Matters
Source to Pay teams must deliver savings, speed, and compliance while reducing manual work. This session focuses on practical updates you can turn on now, plus near-term roadmap items. It is useful for sourcing, procurement, AP, and supply chain leaders who want fewer exceptions and a better supplier and requester experience.

What Was Covered
The session walked through recent and upcoming features across Strategic Sourcing, Procurement, Inventory, and Supplier Accounts. Sourcing added stronger intake controls and dynamic milestones to cut rework, with AI coming to summarize RFP responses and support decision questions in Ask Workday. Supplier management tightened data quality and risk with duplicate detection beyond names, embedded third-party checks, bank detail verification, and a single front door via the unified supplier portal.

Procurement updates centered on Intelligent Intake as an AI "front door," nudges toward catalog items, context-aware search, and a new compliance console to define ordering priorities by location or policy. Inventory enhancements make consignment workable at scale through consolidated replenishment. In Supplier Accounts, OCR accuracy and PO line linking boost touchless invoices, with flexible freight handling at header or line. The team also showed Workday CLM flowing from intake to sourcing to contract authoring with legal playbooks and status visibility back to procurement.

What's New: Source to Pay

Finance

Key Announcements & Takeaways

- Strategic Sourcing
  - Intake workflow governance, state settings, transition actions, and dynamic milestone assignment reduce rework and enforce approvals.
  - AI summaries for RFP responses, with sources shown; Ask Workday follow-ups to compare finalists and probe pricing or delivery differences.
- Supplier management
  - Duplicate prevention checks tax IDs and other identifiers, not only names.
  - Embedded risk integrations, D&B (financial), EcoVadis (sustainability), OneTrust (security), Relish (fraud), configurable in Supplier 360.
  - Bank verification via Relish flags personal accounts or mismatches during supplier self-service.
  - Legacy supplier registration retired; unified supplier portal is the single entry point with MFA and reusable supplier profiles.
  - Supplier workflow automation routes actions by tier or category, for example trigger performance reviews or pause status on risk.
- Procurement
  - Intelligent Intake generally available, conversational paths guide casual requesters to the right process, sourcing, catalog, services desk, or other.
  - Automatic nudges from non-catalog requests to matching catalog items; context-aware search tuned by role and history.
  - Compliance console (roadmap) to set ordering method priorities by site or policy without patchwork config.
  - Automatic PO substitution handling, change orders created from supplier acknowledgements with approved alternates.
  - Business Views combine invoices, POs, and receipts into one report; works with conversational analysis.

What's New: Source to Pay

Finance

- Inventory
  - Consigned inventory improvements, consolidate depletions into a single replenishment, better handling of lots and serials, fewer match-exception blockers.
- Supplier Accounts (AP)
  - Higher-accuracy OCR and smarter PO line linking enable auto-submit for trusted suppliers.
  - Touchless expansion focus on services invoices; flexible defaults for freight at header or line.
- Contract Lifecycle Management
  - Integrated flow from sourcing to Workday CLM, legal playbook redlines, clause insertion, and live status back to sourcing and procurement; future plan to bring line items across.
- What to do next
  - Turn on Intelligent Intake, duplicate checks, and unified supplier portal first.
  - Pilot AI RFP summaries and Business Views to speed evaluations and reporting.
  - Expand touchless AP where OCR confidence is high; set freight handling rules.
  - Revisit consignment with the new consolidation model to improve cash and reduce noise.

What's New: Workday Adaptive Planning

HCM

Finance

Speakers

Jacob Susskind, AJ Christon (Workday)

Why This Session Matters

Planning teams want faster cycles, fewer manual steps, and better collaboration across finance and the business. This session outlines what is new in 25R2 and what is coming next for Adaptive Planning, including AI skills, hubs and workflows, deeper Google Sheets support, and stronger workforce planning. It is relevant for FP&A leaders, modelers, and admins who want speed with control.

What Was Covered

The roadmap centers on four areas, workforce planning improvements, a modernized user experience, AI skills through Ask Workday and the Planning Agent, and ecosystem enhancements for data and security. Workforce planning adds flexible org planning, aggregate headcount planning, top-down routing, and a live refresh from HCM, with org design and scenario modeling in development. The user experience focuses on collaboration and task completion. You can tag colleagues on dashboards, receive Slack notifications, and use a smarter Cell Explorer that handles aggregates across multiple levels. A new Google Sheets integration lets teams build connected reports, refresh data, and submit back to Adaptive, with Ask Workday available in the sheet. Planning Hubs will gather all assets and tasks for a process, and Configurable Workflows will orchestrate submit and approve steps with monitoring.

AI arrives through Ask Workday and Planning Agent skills. Early skills include Data Exploration, which summarizes reports and pivots by any relevant dimension, and Variance Analysis, which explains budget vs actual drivers and ranks the most relevant dimensions. The session closed with platform updates, Cloud Data Connector drill-through and scheduling, unified access and provisioning, multi-level hierarchy setup in Planning Configuration Manager, and an HCM-seeded roster sheet.

What's New: Workday Adaptive Planning

HCM

Finance

Key Announcements & Takeaways

- Workforce planning
  - Plan by cost center, custom org, or store-like structures to match how you run the business.
  - Aggregate headcount planning, request "10 product managers" at once, tie to the roster later.
  - Top-down business process routing in addition to bottom-up.
  - Refresh Actuals from HCM during planning to keep numbers current.
  - Next, visual org design and scenario modeling to compare spans, layers, and outcomes.
- User experience and collaboration
  - Dashboard comments with @mentions and alerts; Slack notifications now, Teams planned.
  - Improved Cell Explorer works on rollups with multiple levels or dimensions.
  - Google Sheets integration, build connected reports, refresh, expand, explore cells, and submit data back; Ask Workday embedded.
  - Planning Hubs, one place for sheets, dashboards, reports, integrations, KPIs, and tasks for each planning process.
  - Configurable Workflows, define to-do, submit, and approve tasks, notify assignees, and monitor progress with due dates and instructions.
- AI and Planning Agent
  - Ask Workday for contextual help and how-to answers directly from admin guides.
  - Data Exploration skill, summarize reports, detect anomalies, and slice by dimensions not present in the layout.
  - Variance Analysis skill, explain drivers behind BvA, rank relevant dimensions, and visualize impacts.
  - Future skills under review, import Excel models into sheets, scenario creation and merge by prompt, admin setup for access and integrations.

What’s New: Workday Adaptive Planning

HCM

Finance

- Data, security, and admin speed
  - Cloud Data Connector, drill-through to warehouse transactions without loading them into Adaptive; schedule pipelines like Design Integrations.
  - Unified User Access Management in Core Workday for permissions, groups, and assignments flowing into Adaptive.
  - Unified User Provisioning and Authentication for smoother multi-instance user sync.
  - Planning Configuration Manager, create multi-level hierarchies by concatenating worktags such as company and cost center.
  - Roster Sheet, seed personnel rosters directly from HCM to speed workforce planning.

What's New: Workday Supply Chain Management for Healthcare

Finance

Speakers

Neelima Mallidi, Keith Lohkamp (Workday)

Why This Session Matters

Healthcare supply chains face higher costs, complex contracts, and constant disruptions. Teams need automation that cuts manual steps, better contract and item controls, and warehouse tools that scale. This session outlines what is new now and what is next in Workday Supply Chain for Healthcare so leaders can drive savings, speed, and confidence.

What Was Covered

Workday's strategy focuses on digitizing the end-to-end flow, from intake to sourcing, contracting, buying, inventory, and AP. Intelligent Intake is now the single front door for procurement, using AI to route casual requesters to the right path, catalog buy, sourcing event, or services intake. Item and contract foundations were strengthened with multi-supplier and multi-participant contracts and manufacturer part numbers elevated to primary fields to enable better analytics and future contract pricing.

Requisition UX and control improved, larger catalog result sets, granular sourcing rules by worktags and item tags, in-flow questionnaires, and a new compliance console to steer requesters to contract or inventory first. Consignment replenishment added stocking levels, minimum reorder quantities, line consolidation, and more flexible change orders. Suppliers can now search POs by procedure info in the portal. Item substitution automation creates change orders when an approved supplier sub is detected. Business Views simplify reporting over items, POs, replenishment, and invoices. Warehousing advances include wave picking and a new batch-picking mobile app for centralized distribution. AP updates enable pay-to supplier changes on POs, higher-accuracy OCR with freight mapping for touchless three-way match, and a fast UI for manual line linking. Contract Lifecycle Management brings AI-assisted redlining and conversational contract analysis, with a Supplier Contract Agent on the roadmap that ties terms to live spend and invoices. Distribution networks will auto-source replenishment across facilities, then fall back to PO if needed, and future work targets bin-to-bin transfers, slotting, cross-dock, and AP–buyer collaboration threads.

Key Announcements & Takeaways

- Intelligent Intake as the front door, guides requesters to catalog, sourcing, or services; more AI improvements coming.
- Contract and item foundations, multi-supplier and participant contracts; manufacturer part number is now a primary field.
- Requisition controls, larger search results, worktag and item-tag routing, in-flow questionnaires, and a new compliance console to enforce policy and hide non-formulary items.
- Consignment at scale, stocking levels and minimum reorder quantities; consolidate bill-and-replace lines; change orders to adjust price or add freight.
- Supplier portal usability, search POs by procedure details for faster reconciliation and payment.
- Auto substitution, detect approved supplier subs and auto-create change orders, with supplier-level activation controls.
- Business Views for reporting, build item-centric analytics that drill to PO, replenishment, and invoice activity without calc-field sprawl.
- Warehousing, wave picking live; batch picking mobile in early use; roadmap includes bin-to-bin transfers, slotting, and cross-dock.
- AP efficiency, change pay-to supplier on POs to handle M&A; OCR plus freight mapping enables touchless PO invoice processing; side-by-side UI for manual PO line linking.
- CLM with AI, automated redlining, clause detection, and Ask-style query over contracts; roadmap Supplier Contract Agent to compare invoices to contract terms and track rebates and tiers.

What's New: Workday Supply Chain Management for Healthcare

Finance

- Distribution networks, auto-select the best fulfillment site based on availability; if none, auto-source to PO; supports prioritized multi-site models.
- What to do next, turn on Intelligent Intake and requisition compliance, tighten consignment with new controls, adopt CLM AI redlining, and expand touchless AP where confidence scores are high.

What's New: Managing AI Agents at Scale with Agent System of Record

IT

Speakers

Joe Lee, Stephanie Felix, Mohan Rajagoplan (Workday)

Why This Session Matters

Enterprises are spinning up many AI agents, often with little governance. Costs, security, and value tracking get messy fast. This session outlines how Workday's Agent System of Record centralizes control, security, analytics, and interoperability so HR and Finance can scale agents with confidence.

What Was Covered

The team defined ASOR as the single source of truth for enterprise agents across three types, Workday first-party agents, custom agents built on Workday or third-party platforms, and partner ISV agents. ASOR provides a lifecycle hub to register, configure, activate or deactivate agents, manage skills and access, and monitor sessions with traceability. Analytics span three layers, observe human–machine collaboration, quantify agent value and ROI, and track operational health with failure hotspots and success rates.

Interoperability comes through an Agent Gateway that unifies access to Workday's 3,500+ APIs and supports industry protocols, Model Context Protocol (MCP) to expose tools by functional area and Agent-to-Agent (A2A) to let external agents discover and call Workday or partner agents securely. A new security framework fingerprints who did what, the end user and the agent, for audit. Pricing clarity was explicit, ASOR is included with HCM and Financials; customers can register unlimited agents.

What's New: Managing AI Agents at Scale with Agent System of Record

IT

Key Announcements & Takeaways

- Core capabilities
    - Agent registry and profiles to catalog all agents in one place.
    - Skill configuration per agent, turn specific skills on or off and set who can use them via security groups.
    - Activation and kill switch for fast, governed enablement.
    - Monitoring with session and execution logs; planned drillable “explanation” view of agent steps.
- Analytics to prove value
    - Observe human–machine work mix, see where agents free up time.
    - Value metrics for productivity, revenue lift, or cost reduction; framework for partners to feed their KPIs.
    - Prescriptive health analytics, success rates, failure points, and trends.
- Interoperability and security
    - Agent Gateway gives unified access to Workday REST, SOAP, WQL, Graph, and more.
    - MCP support to expose tools by functional area so LLMs can reason over the right APIs without overload.
    - A2A support so external agents can discover and invoke Workday agents using standard cards.
    - End-to-end security model tracks both the agent identity and the human end user behind each action.
- Ecosystem and cost
    - Included with HCM and Financials; no extra fee to register agents.
    - Register Workday agents, custom agents built on Flowise, Microsoft Copilot Studio, Google Agent Space, Amazon, and partner ISVs.
    - Agent Marketplace growing, early listings available to explore use cases.

What's New: Managing AI Agents at Scale with Agent System of Record

IT

- Roadmap and timing
  - Early adopter live now; GA targeted for February 2026.
  - GA scope, registry, activation, skills, security, monitoring, and public APIs to register external agents.
  - 26R1 adds owners and org assignment for accountability, org visualizations of agents, initial Microsoft platform integration, and A2A integrations.
  - Ongoing, delete and purge for compliance, richer value analytics, and customer-defined KPIs.
  - Clear Skies program planned for March 2026 to clarify where Workday builds vs partners invest.
- Bottom line
  - Use ASOR to prevent agent sprawl, standardize security and audit, and measure ROI. Enable interoperability through Agent Gateway and industry protocols while keeping humans in the loop and costs under control.

What's New: Workday Business Processes

IT

Speakers

Rebecca Adler (Workday)

Why This Session Matters

Business processes are the backbone of Workday, driving how people and money data moves across every SKU. If you own HR or Finance operations, this session shows concrete upgrades that reduce manual work, improve visibility, and introduce AI to find and fix bottlenecks before they hit the business. The focus is on features you can use now plus near-term roadmap items.

What Was Covered

Workday is expanding the Business Process (BP) framework across four areas: orchestration, manager and admin productivity, safer integrations, and AI for optimization. Orchestrate is now broadly available, and you can trigger orchestrations on corrected or denied process statuses, then track them directly on the Details and Process page with clear origin and status. Productivity gains include step label overrides on five approval step types so managers see meaningful task names in My Tasks, a new Edit To-Do task for quick one-off changes, and better visibility into parallel steps awaiting action.

Integration safety improves with discard-on-exit validation for web services, preventing bad EIB calls from creating saved-for-later events. Delegations can be mass-maintained safely through add, update, and remove operations. Model business processes gain a Rescind REST API with configurable orchestration on rescind, with Reassign on the roadmap. Looking ahead, AI engine results can drive entry conditions, agents can launch from BP steps, Orchestrate gets conditional rules and more trigger points, and a restart-BP-in-error task will simplify recovery. The BP Optimize Agent caps the vision with always-on bottleneck analysis, instant insights, and AI-powered recommendations, plus a roadmap for natural-language questions and peer benchmarks.

What's New: Workday Business Processes

IT

Key Announcements & Takeaways

- Orchestrate for everyone
  - Orchestrations can fire on corrected or denied BP statuses, not only during in-flight steps.
  - Track orchestration type, trigger, and status on the Details and Process page for end-to-end visibility.
- Manager and admin productivity
  - Step label overrides now available on five step types, Approval, Approval Chain, Consolidated Approval, Consolidated Approval Chain, and To-Do, so My Tasks shows meaningful labels.
  - New Edit To-Do task, change a single to-do's title, text, status, or associated task from menu or related action without hunting through bulk tools.
  - "Business Process Steps Awaiting Action" shows all parallel steps awaiting action, including your step label overrides, simplifying follow-ups.
- Safer, cleaner integrations
  - Discard-on-exit validation for web services, failed EIB submissions do not create saved-for-later BP events; errors are returned with the violated validation.
  - Put Delegation web service supports add, update, and remove operations, mass-edit without overwriting other delegation rows.
  - Model BPs can be rescinded via REST; you control what orchestration runs on rescind and whether data reverts.
- AI and automation roadmap for BPs
  - Use AI engine results as step entry conditions, for example route high-risk expenses for extra approvals.
  - Launch agents directly from BP steps, for example tailor an offer letter right after document generation.
  - Orchestrate enhancements, conditional rules, triggers on approval and action steps, and a standalone "restart BP in error" task.
  - Reassign REST API planned to round out model BP control.

What's New: Workday Business Processes

IT

- BP Optimize Agent
  - Three pillars, proactive bottleneck monitoring, instant insights on any BP, AI recommendations to improve flow.
  - Roadmap includes natural-language questions like “What are our worst performing BPs?”, peer benchmark-based suggestions, and deeper context comparisons by region or org.
- Scale reminders
  - 800+ BP types across Workday, 600+ new definitions created daily, and over 15,000 BP transactions processed per minute, so even small optimizations pay off quickly.

What's New: Workday Extend

IT

Speakers
Emily Ramey, Steven Gee (Workday)

Why This Session Matters
Many teams already invested heavily in Workday data, security, and governance. This session shows how to build on that foundation with Workday Extend, speeding delivery while keeping control. It is most useful for HRIS, finance IT, and platform owners who want to consolidate tools, respond faster to change, and add AI without creating new risk.

What Was Covered
The speakers positioned Extend as a core pillar of the broader Workday Build platform, not a rebrand. Extend apps inherit Workday security, audit, and data models, and connect to Workday and third-party systems through APIs. Extend Professional adds scale and AI services access, including Workday AI Gateway and native AWS AI integrations, plus higher data and app limits.

User experience investments focus on getting users to apps faster and making apps smarter. Extend Cards surface apps on Home, Hubs, Search, and Journeys. Apps can embed in 30+ Workday profiles like Worker and Company. AI Widgets add in-page genAI for rich text with admin-controlled prompts that use page data.

Developer productivity centers on a unified toolset. App Builder gains Workday Developer Copilot for page, WQL, and script generation; Copilot for APIs to find the right endpoints; and a coming Copilot for Orchestrate that generates and explains flows. DevOps improvements include a new CLI, local disk sync, live errors and autocomplete, and reusable tenant configuration to promote safely.

Operationally, App Retirement frees entitlements by retiring unused apps. Regions expand for data residency, with new locations coming online. Prism in dev tenants lets teams prototype data-rich apps at no cost. Finally, Flowise Agent Builder integrates with Extend Professional so teams can create governed agents that call apps and orchestrations.

Key Announcements & Takeaways

- Platform and scope
  - Extend remains a core part of Workday Build, not a rename; apps inherit Workday security and audit.
  - Extend Professional supports AI services, larger data volumes, and more apps; aim it at complex, high-scale use cases.
- Enriched app experiences
  - Extend Cards place apps on Home, Hubs, Search, and Journeys to drive discovery and action.
  - Embed Extend apps in Workday profiles such as Worker and Company to meet users in the flow of work.
  - AI Widgets (rich text) add refine and generate actions with prompts grounded in page data; admins control wording and tone.
- Developer speed and DevOps
  - Workday Developer Copilot generates pages, WQL, and validation scripts; provides snippets and reusable functions.
  - Copilot for APIs searches across thousands of Workday APIs to return the right endpoint with usage guidance.
  - Copilot for Orchestrate (roadmap) creates flows from natural language, iterates conversationally, and produces stakeholder summaries.
  - Developer CLI adds commands for CI/CD; local disk sync removes manual downloads; live error hints and autocomplete reduce build-time failures.
  - Reusable tenant configuration cuts setup time across environments; use it to avoid brittle manual steps.
- Operate at scale
  - App Retirement in 25R2 reclaims entitlements by retiring unused

- apps across promotion levels, including production.
- Regional expansion improves data residency options; plan deployments with new regions in mind.
- Prism available in dev tenants for experimentation, even without a Prism license.

- Agents and interoperability
  - Flowise Agent Builder embedded in the developer site for Extend Professional; build agents that call Extend apps and orchestrations with governance.
- Proof points and use cases
  - Customer examples showed consolidation of legacy tools, faster onboarding for contingent workers, and curated learning paths at scale.
- What to do next
  - Add Extend Cards to your top apps; embed key pages in Worker and Company profiles.
  - Pilot AI Widgets on forms that suffer from blank-page writing, for example descriptions and comments.
  - Adopt Copilot for WQL and scripts, the CLI, and reusable configuration to shorten time to prod.
  - Retire stale apps to free capacity; enable Prism in dev; start building governed agents where conversational flows help users complete work.

What's New: Workday Orchestrate and Integrations

IT

Speakers

Kevin Ross, EE Jones (Workday)

Why This Session Matters

Enterprises run on many systems. Moving people and money data across them must be fast, reliable, and governed. This session explains how Workday Orchestrate becomes the primary tool for custom integrations, how it scales, and what is coming to speed build, improve observability, and add AI safely.

What Was Covered

Workday positioned Orchestrate as the new standard for custom integrations, with Studio supported for existing builds. Orchestrate sits in the core platform, connects to Business Processes, Extend, APIs, and analytics, and brings low-code speed plus built-in scale. The team shared production benchmarks for batch and real-time patterns, then walked through plan, build, and operate stages: BP-triggered flows including on corrections, API polling for bulk syncs, orchestration import for reuse, and a new debugger to test data, transforms, and calls live.

For operations, admins get orchestration status in BP history with relaunch, a developer Activity dashboard, Log Viewer, and cancel actions. The roadmap adds longer runtimes, explicit parallelization, trigger-integration components, Integration Insights APIs for enterprise-wide monitoring, and AI: a Developer Copilot to generate and summarize flows, plus an Intelligent Data Manager that modernizes EIB-style imports with mapping suggestions, conversational fixes, and error guidance.

What's New: Workday Orchestrate and Integrations

IT

Key Announcements & Takeaways

- Orchestrate as the default
    - General availability in 25R2 with self-service enablement.
    - Studio remains for maintaining existing integrations; net-new use cases should use Orchestrate.
- Scale and performance
    - Proven batch throughput examples, around 260k records in a run and about 10k transactions per minute; inbound import patterns scaled in tests far higher.
    - Planned runtime increase from minutes to up to 48 hours, support for long-running API requests, and optional explicit parallelization.
- Build faster
    - Orchestration import to reuse subflows from other apps.
    - New debugger to test WQL, transforms, and HTTP calls with live inputs and outputs.
    - Trigger-integration component to launch other integrations inside a flow.
    - API polling to support systems that process data asynchronously.
- BP interoperability
    - Launch orchestrations from BP events and additional actions, including corrections and denials; monitor runs directly in BP history and relaunch from there.
- Operate with confidence
    - Orchestrate Activity dashboard for run-level metrics and performance summaries.
    - Log Viewer embedded in the builder for step-level diagnostics; cancel actions available, more admin actions coming.
    - Integration Insights APIs on the roadmap to export cross-tool telemetry for centralized analysis.
- AI investments
    - Developer Copilot for Orchestrate to generate flows from specs, explain steps, and produce summaries for design docs.
    - Intelligent Data Manager concept to replace tedious EIB

  - mapping, suggest field matches, answer data questions, and propose smart fixes for import errors.
- Practical next steps
  - Enable Orchestrate in 25R2 and pilot it on one net-new integration pattern.
  - Shift BP-triggered and event-based use cases first; keep Studio for steady-state maintenance.
  - Adopt the debugger and Activity dashboard for faster testing and triage; plan for the runtime and parallelization upgrades.
  - Prepare teams to use Copilot and, when available, Intelligent Data Manager to cut build and import effort.

What's New: Workday Prism Analytics

IT

Speakers
Krupa Natarajan, Abhi Sinha (Workday)

Why This Session Matters
HR and Finance leaders need trusted insights in the flow of work, not another BI silo. This session shows how Prism blends Workday and external data with Workday security, then adds scale, better data management, and AI-powered analysis. If you build dashboards, run Accounting Center, or stitch data for executives, these updates reduce effort and speed decisions.

What Was Covered
The session opened with why Prism matters, one source of truth that combines Workday with external data, respects Workday security, and lets users act without leaving Workday. Practical use cases included total workforce headcount across multiple systems, total compensation that blends payroll, stock, benefits, and even tips using badging and card data, workforce optimization like return-to-office compliance and meeting-load analysis, and employee sentiment by joining Peakon or survey data. Finance examples covered supplier spend, operational KPIs, profitability with Accounting Center detail, and M&A tracking against targets.

Product investments fall under three themes. Platform focuses on scale and performance using Spark and Parquet, smart resource allocation, incremental “tables,” high-concurrency query execution, and stronger audit and lineage. Data Management adds easier ingest through warehouse and cloud-storage connectors, SFTP maintenance simplification, run-time trend analysis, a visual pipeline canvas, and hourly scheduling. Analyze brings bigger calculation limits, new statistical functions, and conversational reporting over Prism data.

What's New: Workday Prism Analytics

IT

Key Announcements & Takeaways

- Platform scale and performance
  - Runs at enterprise scale, around 215 trillion rows processed monthly, 30 million queries per month, 1.1 million monthly users.
  - Smart Resource Allocation assigns compute based on job size; "tables" enable incremental processing so only changed rows are handled.
  - Audit and lineage, know who changed what and the downstream impact.
- Faster publishes and simpler entitlements
  - Data Publish is moving under the hood to Spark + Parquet, early logs show up to 60 percent faster publishes after a republish.
  - Reportable row usage becomes simpler, a row is a row with tables; many tenants will see lower counted usage for very long rows.
- Data Management, easier ingest and operations
  - Point-and-click connectors to Snowflake, BigQuery, Redshift, Azure; Salesforce app connector; new CSV ingest from Google Cloud and Azure storage.
  - SFTP improvement, keep auth in the connection object and file paths in each DCT to cut maintenance.
  - Trend Analysis dashboard, visualize runtime, wait time, and rows published over time to spot slowdowns.
  - New visual pipeline canvas (EA), see dependencies and errors in one place; roadmap includes joins across pipelines and conditional branches.
  - Hourly scheduling with safeguards for bursty jobs.
  - Pipelines as code (direction), export/import a DSL for version control and future AI copilot generation and debugging.
- Analyze, more power for authors and consumers
  - Count Distinct limit increase from 5,000 to 1,000,000 for richer Prism reports.
  - New percentile and median functions targeted for the next major release.

    - Conversational reporting on Prism data, ask questions in plain language and move from answer to action in Workday.
- Practical next steps
    - Republish key pipelines to pick up faster Spark-based publishes and validate entitlement impacts.
    - Use connectors or new cloud-CSV ingest to replace custom feeds; standardize SFTP setups with the new pattern.
    - Turn on Trend Analysis and pilot the pipeline canvas to simplify troubleshooting.
    - Prepare authors for higher-fidelity analytics with Count Distinct, then plan to adopt percentile and median when available.

What's New: Workday Student

Student

Speakers
Joellen Shendy, (Donna Marzolf (Workday)

Why This Session Matters
Student teams are under pressure to improve the student experience while reducing manual work for staff. This session focuses on concrete updates you can enable now in Workday Student, from smarter waitlists and transfer credit tooling to real-time billing and a modern planning and registration flow. If you run registrar, advising, financial aid, or student accounts, these changes speed throughput and reduce errors.

What Was Covered
The session centered on two tracks, staff productivity and a simpler student experience. For staff, Workday introduced a cleaner navigation with pin-to-sidebar, a Student Configurations Hub that surfaces new features and common tasks, and a Campus Engagement Hub with run history and email analytics. Waitlist management was overhauled, configurable notices, allow students to self-remove, resolve time conflicts and drop a clashing class in one step, new policy controls for holds and expired offers, plus a mass clear task. Admins can now perform course swaps on behalf of students and edit single to-dos quickly; step-label overrides make task inboxes clearer. Registration appointments can be rolled to new periods or modules and auto-refreshed on a schedule.

Transfer credit advances include public APIs for "what will transfer" use cases, Equivalent Transfer Credit Intelligence to suggest rules based on tenant patterns, Intelligent Transcript Capture to turn PDFs into structured data with human review, and troubleshooting consoles that explain why credit did not apply. An Academic Progress troubleshooting console highlights disqualified and eligible registrations with reasons. In student finance and aid, Return to Title IV worksheets support per-student overrides; real-time billing is available via configuration; and mass operations can apply charges in one action. For students, academic planning now shows courses currently offered or typically offered for a term, and a new Saved Schedule experience enters preview with rich filters, details, and a calendar view. Grade-change notifications are automatic. Roadmap items add guardrails and non-course commitments to Saved Schedules, create-from-plan, and an AI schedule optimizer, plus early agents for administration, requirements, and faculty workflows.

Key Announcements & Takeaways

- Navigation and hubs
  - Pin frequent apps to a persistent sidebar; Student Configurations Hub surfaces new features and key tasks.
  - Campus Engagement Hub shows active plans, runs, and email open/click analytics to tune outreach.
- Waitlist upgrades
  - Customizable waitlist notifications; student can accept, decline, or remove themselves.
  - One-step conflict resolution, drop the clashing class and enroll in the offer from the same task.
  - New policy options, notify students with holds, choose behavior after offer expiry, move to end or remove.
  - Mass clear waitlists at period end.
- Registrar efficiency
  - Admin course swap reaches parity with student swap behavior.
  - Clearer inboxes with step-label overrides; quick Edit To-Do for one-off changes.
  - Registration appointments, roll to future terms or modules and schedule automatic refreshes.
- Transfer credit and progress
  - APIs for prospective transfer evaluations; Equivalent Transfer Credit Intelligence suggests mappings from your tenant history.

  - Intelligent Transcript Capture converts PDFs to structured data with human-in-the-loop review.
  - Troubleshooting consoles for transfer and academic progress explain "why not applied," show disqualified vs eligible courses.
- Student finance and aid
  - Return to Title IV worksheet supports per-student overrides for dates and breaks.
  - Real-time billing available via configuration; charges post immediately when date controls allow.
  - Mass apply student charges from a report-driven selection, for example late fees.
  - AI anomaly surfacing in journals to flag potential imbalances.
- Student experience
  - Academic planning highlights currently offered and typically offered courses for a requirement in a chosen term.
  - Saved Schedule preview, calendar view, deep section details, robust filters by level, mode, instructor, and time.
  - Automatic grade-change notifications push students back to the course.
- Roadmap signals
  - Saved Schedule guardrails, non-course commitments, create from plan, and an AI optimizer.
  - Early agent directions, Student Administration, Academic Requirements Management, Faculty.
- What to do next
  - Turn on waitlist policy options and mass clear to speed seat utilization.
  - Enable the troubleshooting consoles for advisors; pilot transcript capture where volume is high.
  - Consider real-time billing and mass charges for cleaner student accounts.
  - Preview the Saved Schedule experience with a pilot group; plan for the optimizer to reduce advising load.

Product Strategy and Vision

Future roadmaps at a glance for HR and Finance

Build or Buy? Understanding Strategic Considerations

HCM

Finance

IT

Speakers
Matt Komendolowicz (Incubane)

Why This Session Matters
Workday customers now face a real choice, build with Workday Extend or buy partner apps from the Built on Workday Marketplace, or do both. The right call affects speed, cost, risk, and how quickly you deliver value. This session outlines a simple decision model, shows practical examples, and gives guidance that HRIS, IT, and business owners can use immediately.

What Was Covered
The session charted the evolution of the ecosystem, from Workday Extend to Marketplace products and the rise of agents. With more options, the hard part is choosing where to build bespoke versus where to buy configurable apps. The speaker contrasted two real examples. First, a custom Extend app that rebuilt Job Requisition with embedded AI to find the right job profile and generate a tailored description. Second, a configurable Marketplace app for 360 Feedback that any customer can deploy, with templates, translations, approvals, reporting, and an AI summary of results.

The core of the talk was a decision tree. Start by asking if the problem is common or unique. If unique and strategic, build in Extend to match your process exactly and keep data, security, and approvals inside Workday. If common, search Marketplace and evaluate configurability, price, timeline, and whether you have the skills to build and maintain. The guidance closed with pragmatic advice by company size. Large enterprises will likely combine both approaches; smaller teams may prefer buying first and reserving builds for a few high-impact needs.

Build or Buy? Understanding Strategic Considerations

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Key Announcements & Takeaways

- When to build with Workday Extend
  - Use cases
    - Unique processes you cannot get from standard product or Marketplace.
    - Flows that benefit from deep Workday security, audit, and bespoke UI or validations.
  - Benefits
    - Tailored fields, logic, and business process steps that mirror your policy.
    - Faster UX for your users, fewer external vendors to onboard, direct control of updates.
  - Costs and risks
    - Need scarce Extend skills, either in house or through a partner.
    - Ongoing ownership for testing after releases and for enhancements.
- When to buy from the Built on Workday Marketplace
  - Use cases
    - Common, repeatable problems like 360 feedback, goal setting, or compliance trackers.
    - Needs where configuration, not code, should do most of the work.
  - Benefits
    - Shorter time to value, typically days to go live with self-configuration.
    - Pre-approved quality on the platform, with updates handled by the vendor.
  - Considerations
    - Subscription pricing and budgeting.
    - Depth of configurability, languages, labels, security, and business process fit.
-

Build or Buy? Understanding Strategic Considerations

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- Example, build: custom Job Requisition with AI
  - What it showed
    - Bespoke entry screens and warnings.
    - AI helper to suggest job profiles by level, then generate a role description from keywords.
  - Why it matters
    - Reduces rework and speeds hiring when your process differs from standard.
- Example, buy: 360 Feedback (Marketplace app)
  - What it showed
    - Templates for questions, multilingual labels, anonymization, and an approval step.
    - In-product surveys for peers, managers, and reports, plus AI summary and detailed results.
  - Why it matters
    - Solves a common need without building, keeps all data and security in Workday.
- Decision model you can reuse
  - Start with the problem
    - Is it common across companies or unique to you?
    - Is there a Marketplace product that is configurable enough?
  - Check constraints
    - Budget for subscription vs build costs.
    - Internal skills and appetite to own long-term maintenance.
    - Go-live deadline, buying is usually faster.
  - Make the call
    - Unique and strategic, build.
    - Common and configurable, buy.
    - Hybrid, buy the core and build the edge.
- Guidance by company size
  - Large enterprises
    - Expect a mixed portfolio, several Marketplace apps plus a roadmap of Extend apps and agents.

Build or Buy? Understanding Strategic Considerations

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    - Mid-market and small teams
        - Start buy-first for speed; build only where it creates clear advantage.
- Practical next steps
    - Map your top five gaps to the decision model and check Marketplace first.
    - For one high-impact unique process, scope a small Extend build with clear owners and test plans.
    - Standardize how you assess configurability and total cost of ownership for any Marketplace app.
    - Define support and release testing for both bought and built solutions so nothing falls through the cracks.

Insights and AI for HR: Strategy and Vision

HCM

Speakers
Phil Wilburn, Kristen Vonheeder, Edward Raffaele (Workday)

Why This Session Matters
HR leaders are expected to turn AI from hype into measurable value. That requires trusted insights, practical workflow changes, and responsible adoption. This session shows how Workday combines work intelligence, conversational analytics, and agents to redesign work, speed decisions, and improve outcomes across HR.

What Was Covered
The session framed a simple arc, understand today, plan the future, then bridge the gap with action. Workday People Analytics and a new Analytics & Reporting Hub give fast visibility into trends like attrition, skills, and performance. AI data recommendations help authors pick the right data sources and fields, then scaffold reports. Conversational reporting lets HR business partners ask questions in plain language, keep context across follow ups, and move directly to actions, for example launching a learning campaign for high performers without AI skills.

For future state planning, org design and scenario modeling connect HR and finance to test spans, layers, cost, and talent availability. Skills based workforce planning forecasts capability gaps and guides upskilling, hiring, or redeployment. A Job Architecture Hub uses AI to streamline roles and align skills, while company defined career paths guide employees with paths tied to architecture. The engineering section showed how agents run with tenant context, human in the loop memory, and observability in an Agent System of Record and Agent Gateway. Examples included a Payroll Audit Agent that prevents errors before payroll finalization and a Business Process Optimization agent that benchmarks configuration and recommends changes. The strategy close shared adoption practices, moving from a three pillar HR model to a pod and swarm approach, making AI usage a company priority, and replacing time consuming time and motion studies with AI driven work analysis.

Key Announcements & Takeaways

- Work intelligence first
  - People Analytics for KPIs; slice by org, region, level to find risks and opportunities.
  - Analytics & Reporting Hub centralizes report authoring, discovery boards, worksheets, Prism, and admin tools.
  - AI data recommendations suggest the best data sources and fields, then prefill report layouts.
  - Conversational reporting answers plain language questions, remembers context, and links to actions.
- Plan and align the future
  - Org design and scenarios compare options on cost, headcount, spans and layers, and talent availability with finance transparency.
  - Skills based workforce planning forecasts gaps and selects upskill, hire, or redeploy strategies.
  - Job Architecture Hub uses AI to clean roles and keep skills current; career paths connect employee goals to business needs.
- Compliance and fairness
  - New pay transparency solution from a partner consolidates internal and external data to spot pay gaps and support decisions at scale.
- Agents with governance
  - Agent System of Record provides usage, telemetry, and easy on or off controls; Agent Gateway integrates Workday and third party agents.
  - Payroll Audit Agent automates complex checks, flags low confidence items for review, and learns from human feedback.
  - BP Optimization agent benchmarks 800 plus processes and

    - recommends changes that cut cycle time, for example reducing Change Job processing from days to hours.
- Proven internal outcomes
    - AI adoption moved from under half to over 80 percent of employees after structured enablement and goals; high adopters showed stronger career path sentiment and strategy alignment.
    - Pod and swarm HR operating model creates flexible problem solving capacity while AI reduces transactional load.
    - AI led work analysis replaces months long time and motion studies, enabling large reorganizations in weeks.
- Bottom line
    - Start with trusted insights inside Workday, use conversational analytics to move from question to action, and deploy agents with human oversight. Pair tech with a modern HR operating model to scale adoption and realize measurable impact.

Talent Acquisition | Elevating Hiring Outcomes: Strategy and Vision

HCM

Speakers
Charlotte McLachlan, David Wachtel, Muli Farkas (Workday)

Why This Session Matters
Hiring teams face more applicants per job, longer time to fill, and pressure to show business impact. This session sets a clear path to reimagine hiring with AI and agents while improving the core candidate experience. It is useful for TA leaders, HRIS teams, and hiring managers who want measurable speed, quality, and cost gains.

What Was Covered
The session framed a three-pillar strategy: reimagine candidate experience, unleash AI to elevate TA productivity, and innovate on a flexible platform and ecosystem. Demos showed friction removal for candidates, social sign-in, single-page quick apply, shift availability capture, and future Candidate Insights that compare a resume to a role and suggest better fits. Internal mobility is pulled forward through internal pools, campaigns, and embedded rediscovery in the requisition.

For hiring teams, Workday is adding conversational flows for managers to create requisitions and interview teams, in-the-flow nudges that recommend actions, explainable candidate scoring in recruiter grids, and AI summaries of interview feedback. Manager Insights Hub consolidates hiring actions and downstream steps like offers and onboarding. The ecosystem story connects Workday Recruiting with HiredScore and Paradox, expands open APIs, and adds agents to cover more of the workflow, including a new contingent sourcing agent.

Talent Acquisition | Elevating Hiring Outcomes: Strategy and Vision

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Key Announcements & Takeaways

- Core candidate experience
  - Social sign-in for candidates with Google and Apple, LinkedIn planned.
  - Quick apply with resume parse, single-page review and consent.
  - Shift availability capture post-apply for high-volume roles.
  - Candidate Insights (future), resume-to-job fit, skills gaps, and suggested roles.
- Internal mobility first
  - Internal candidate pools and targeted campaigns.
  - Embedded HiredScore Fetch in requisitions to rediscover past applicants and employees.
- AI for speed and quality
  - Conversational requisition creation and interview team setup, early access after 25R2.
  - Hiring Navigator nudges, for example suggest external posting when internal supply is thin.
  - Explainable candidate scoring in the grid to build trust and prioritize action.
  - Interview feedback summarization to accelerate decisions while preserving drill-down.
  - Manager Insights Hub surfaces hiring, offer, and onboarding signals to reduce back-and-forth.
- Proven impact signals
  - Customer results highlighted, for example AdventHealth, 1,200 hires from rediscovery, 40 percent faster manager decisions, requisitions reduced.
  - Volume context, over 230 million applications processed in the first half of 2025.
- Ecosystem and platform
  - HiredScore and Paradox combined with Workday to cover sourcing, screening, apply, and scheduling.
  - Contingent sourcing agent for non-employee hiring.

  - Open APIs and Built on Workday apps to extend where needed without adding tool sprawl.
- Operating model shift
  - Agents handle routine tasks with human in the loop, freeing recruiters to build relationships and strategy.
  - Focus on measurable outcomes, time to fill, quality of hire, conversion, and candidate satisfaction.

Talent Development and Growth

HCM

Speakers

Bernie Foley, Carian Hanley, Charlotte McLachlan, David Wachtel (Workday)

Why This Session Matters

HR is now at the strategy table and must show impact fast. Teams need a connected talent system that builds internal mobility, develops skills, and lifts performance, while keeping managers productive. This session sets a clear path to use Workday's current capabilities and near-term AI to deliver results now.

What Was Covered

The session framed three outcomes: be a destination workplace, unlock peak performance, and build for the future of work. Demos showed how Journeys, Career Hub, Learning, and Peakon connect with AI to guide employees, reduce blank-page work for goals and feedback, and surface growth opportunities in the flow of work. A stronger ecosystem story included the deepening partnership with Sana to speed content creation, AI tutoring, and analytics.

Managers gained a central view in Manager Insights Hub, with Talent Highlights, AI comment summaries and translations from Peakon, and upcoming assistants that draft development items and performance reviews with sources visible for trust. For workforce agility, Flex Teams assemble skills-based project teams, company-defined career paths make mobility transparent, and a future Continuity Agent supports proactive succession. Customer results illustrated the model, for example $27M saved from improved internal mobility, 10 percent reduction in top-talent attrition with continuous listening, 80 percent of leadership roles filled internally, and 98 percent reduction in learning modules to return thousands of hours to the business.

Talent Development and Growth

HCM

Key Announcements & Takeaways

- Destination workplace
  - Journeys at scale, including self-service journeys in 25R2, guide growth and change.
  - Career Hub as the one-stop for skills, mentors, learning, and internal opportunities; performance and career details unify in 26R1.
  - AI assist for employees, Generate Goal Description from a title, and structured feedback help using the SBI model.
  - Cloud Connect for Learning expansion, partner count more than doubled via self-service APIs.
- Manager productivity and performance
  - Manager Insights Hub centralizes team signals with Talent Highlights for strengths and opportunities.
  - Peakon AI, comment summarization and translations reduce reading time and support global teams.
  - Employee Sentiment capabilities, AI Topics cluster feedback, one-off surveys created and routed in minutes, suggestions to act, for example start a reskilling journey.
  - Coming assistants, managers propose AI-generated development items; Performance Agent drafts evidence-based reviews with sources shown and final human control.
- Future of work and continuity
  - Flex Teams match workers to initiatives by skills, with AI candidate suggestions from the global workforce.
  - Company-defined career paths provide clear next steps, align mobility with job architecture, and can be shared with managers.
  - Succession readiness, succession metrics arrive in HR Partner Hub in 25R2; a future Continuity Agent flags risk roles, proposes successors, and orchestrates actions.
- Ecosystem and strategy signals
  - Workday and Sana coming together to accelerate AI-native learning creation, tutoring, and analytics.

  - Proven outcomes from customers, internal mobility up, attrition down, large time savings from simplified learning portfolios.
- Bottom line
  - Use the connected set, Journeys, Career Hub, Learning, Peakon, and Manager Insights Hub, to deliver value now. Add AI helpers to remove friction and keep humans in the loop. Build skills-based mobility and succession so the organization is ready for what comes next.

Total Workforce Management: Strategy and Vision

HCM

Speakers

Mariana Santiago, Kevin Martins, Andrew Gossett (Workday)

Why This Session Matters

Work is no longer only employees. It is employees, contingent workers, and now AI agents working together. This session shows how to execute a total-workforce strategy in Workday, so you can hire faster, control labor cost, stay compliant, and improve frontline experience. It is useful for HR, HRIS, operations, and finance leaders who want practical steps, not theory.

What Was Covered

The session focused on execution across three themes: adaptability and agility, workforce and cost optimization, and productivity and experience. For adaptability, the team showed how to treat contingent talent as part of total talent. Workday VNDLY manages the full contingent lifecycle; direct sourcing taps talent marketplaces and internal pools; agents assist with candidate discovery and SOW processing.

For cost and compliance, Workday Scheduling and Time use rules and insights to prevent penalties and overtime before they happen. Predictive scheduling flags penalties up front; centralized scheduling creates pattern-based rosters; demand forecasting turns KPIs like sales or footfall into labor plans; optimized schedules balance coverage with worker preferences.

For experience, Manager Insights Hub centralizes hiring and staffing actions for both employees and contingent workers. Frontline Agent lets a worker or manager use natural language to check schedules, change availability, resolve no-shows, compare payslips, and approve time. Time Kiosk enables quick clock-in on shared devices. DailyPay integration supports earned wage access.

Total Workforce Management: Strategy and Vision

HCM

Key Announcements & Takeaways

- Total workforce mindset
  - Employees, contingent workers, and AI agents are planned and managed together; execution is the focus.
  - Direct sourcing plus internal pools reduce time to fill without sacrificing quality.
- Contingent hiring and SOWs
  - VNDLY embedded in Workday for one place to view work orders, tenure risk, budgets, and approvals.
  - Recruiting Agent for employees and a Contingent Sourcing Agent for non-employees rediscover proven talent and grade applicants.
  - Document Intelligence for SOWs, extract key data, compare to MSAs, surface savings, and monitor compliance.
- Compliance and cost control
  - Predictive scheduling alerts on penalties before publish; minors and notice rules enforced.
  - Centralized scheduling for static rotations; guardrails prevent overtime and wage-hour breaches.
  - Demand forecasting uses operational signals to generate labor needs; managers can adjust assumptions and regenerate schedules.
- Frontline productivity and experience
  - Frontline Agent handles SMS absence reporting; WhatsApp support planned.
  - No-show replacement suggestions sent automatically; managers confirm with one tap.
  - Workers update availability and preferences, view schedules, and ask pay questions using natural language.
  - Time Kiosk supports shared devices; fast check-in without personal phones.
- Manager efficiency
  - Manager Insights Hub unifies hiring, staffing, time, and scheduling; quick drill to requisitions and work orders.
  -

    - Ask Workday highlights time anomalies and enables mass approvals with confidence.
- Proven value signals
    - Customers report large cuts in schedule-build time and faster contingent onboarding; direct sourcing and redeployment reduce cost.
- Bottom line
    - Start by unifying employee and contingent processes in Workday; add predictive rules and forecasting to prevent waste; deploy agents for frontline tasks. This delivers faster fills, lower labor cost, and better worker experience with strong compliance.

HCM Core, People Operations, and Total Rewards: Strategy and Vision

HCM

Speakers
Cristina Goldt, Nancy Weitl, Kevin Martins (Workday)

Why This Session Matters
HR leaders are asked to do more with less, keep data clean, and prove impact. This session lays out a practical plan to move from firefighting to strategy using Workday's wellness platform, compensation intelligence, agentic AI, and cleaner core processes. It is useful for HR, HRIS, payroll, and total rewards teams that want faster execution with stronger control.

What Was Covered
The talk focused on three imperatives: reimagine total rewards, redesign how work gets done, and power transformation with AI. On rewards, Workday introduced Workday Wellness, a partner ecosystem with pre-connected integrations, a marketplace to add vendors in hours, decision support for employees via Ask Workday, and a year-round digital wallet experience. Compensation updates paired real-time market insights through a certified Compa integration with Workday Wage Intelligence to make pay decisions faster and more equitable. A Minimum Wage Compliance Agent monitors changes, estimates impact, and orchestrates updates across payroll, comp, and employee comms.

For people operations, the team addressed hard admin work. New experiences let HR handle out-of-order events without breaking chronology, and a retroactive event manager guides changes safely. A Mass Change Job accelerator turns large reorganizations into a simple, governed flow with checks and next steps. Org design and scenario modeling in Adaptive Planning enable what-if analysis before committing changes. HR service delivery gains AI case summarization and a Case Agent that assigns work based on capacity and skills. Frontline Agent on mobile helps workers and managers swap shifts, create cases, and complete actions in simple conversational steps. Finally, a Job Architecture Agent proposes mappings and structures during high-stakes events like mergers, speeding clean integration.

Key Announcements & Takeaways

- Workday Wellness platform
  - Pre-connected partner ecosystem and marketplace to add benefits quickly.
  - Admin insights on utilization and benchmarks; fewer custom integrations and lower risk.
  - Employee decision support in enrollment and a digital wallet for ongoing engagement.
- Compensation intelligence
  - Compa integration to benchmark cash, stock, and skills-based pay inside workflows.
  - Workday Wage Intelligence adds ML-driven global pay signals to support fair, competitive offers.
  - Minimum Wage Compliance Agent alerts, estimates cost, guides plan updates, and informs employees.
- People operations efficiency
  - Safe historical and out-of-order changes with guardrails to protect data integrity.
  - Mass Change Job accelerator for bulk moves with validation, prompts, and clear next steps.
  - Org design and scenario modeling in Adaptive to compare span, layers, headcount, and cost before change.
- HR service delivery and frontline
  - AI case summaries reduce reading time; Case Agent improves assignment speed and lowers bounce rates.
  - Frontline Agent handles shift swaps, absence, and quick manager actions on mobile.

HCM Core, People Operations, and Total Rewards: Strategy and Vision

- Job architecture at scale
  - Job Architecture Agent maps incoming roles and proposes new families, speeding mergers and large updates.
- Bottom line
  - Treat rewards as a strategic lever, move routine work to agents with human oversight, and design changes before executing. This improves speed, compliance, and employee experience while keeping core data clean.

Workday Payroll: Strategy and Vision

HCM

Speakers
Jen Cozier, Stefan Ball, Cristina Goldt, Richard Salgado (Workday)

Why This Session Matters
Payroll teams face fast regulation changes, multi-vendor complexity, and pressure to do more with less. This session lays out how Workday is advancing core payroll, unifying global operations, and introducing the Payroll Agent to prevent errors and automate work with human oversight. It is useful for payroll, HRIS, finance, and operations leaders who want faster cycles, fewer exceptions, and clearer global visibility.

What Was Covered
Workday recapped scale and momentum, a community of thousands of payroll customers, hundreds of annual compliance updates, and continued core investments like data entry controls and lock payroll. A deeper partnership with DailyPay supports on-demand pay in the US and Canada.

Global strategy centered on Global Payroll Connect and the Global Payroll Hub, which now brings third-party and native Workday payrolls into one place. Teams can run checklists, surface cross-vendor insights, forecast costs, and use a new Hub Companion to review variances and even finalize third-party payrolls without leaving Workday. Partner coverage is expanding, with dozens of certified or in-flight connectors. Native footprint momentum includes payroll for Australia in production with strong adoption, Ireland entering general availability, and New Zealand development starting.

The second half showcased the Payroll Agent. Built into Workday, it uses natural language, tenant context, and guardrails to execute tasks, prevent errors, and explain results. Live scenarios included minimum wage change handling across comp and comms, instant CFO-ready pay analysis, taxable gift card capture by managers, jurisdiction registration checks with defaulted setup, guided bonus payroll audits with saved worksheets, commission file-to-EIB conversion with rules and split payouts, and conversational payment election updates for employees. General availability is targeted for early next year, with more skills on the roadmap.

Key Announcements & Takeaways

- Strong core and ecosystem
  - Continued compliance scale and usability improvements like data checks and prompt recommendations.
  - DailyPay partnership deepens on-demand pay for US and Canada.
- One global payroll experience
  - Global Payroll Hub now includes Workday native payrolls alongside partners, with checklists, due dates, and links to tasks and reports.
  - Metrics and insights detect cost spikes and overtime drivers; forecasting projects future impact for proactive action.
  - Hub Companion surfaces third-party variances in real time and can complete vendor payroll steps from inside Workday.
  - 35+ partners in the network, many certified on Global Payroll Connect.
- Native footprint momentum
  - Australia live with strong adoption.
  - Ireland moving to general availability with early adopters live.
  - New Zealand payroll development underway.
- Payroll Agent, practical skills
  - Compliance watch: detect minimum wage changes, estimate cost, guide compensation updates, and notify employees.
  - Fast analysis: on-demand gross pay and driver breakdowns for executive asks.
  - Frontline support: managers record taxable items like gift cards; agent routes secure payroll input for approval.
  - Configuration guardrails: flag hires in unregistered jurisdictions; prefill setup fields to accelerate compliance.
  - Audit at scale: run rule-based bonus payroll audits; save results to worksheets with recommended fixes.

- Input automation: transform commission spreadsheets into validated EIBs, apply pay-code rules, coverage dates, and split payments.
- Employee experience: conversational payment election updates reduce tickets and errors.
- Governance first: human in the loop with approvals, traceability, and tenant context.

- What to do next
  - Consolidate global visibility in the Hub; use forecasting and variance prompts to act earlier.
  - Pilot Payroll Agent skills where friction is highest, for example minimum wage changes, bonus audits, and EIB generation.
  - Plan country expansion with native payrolls and certified partners to reduce integration cost and time.

Workday Adaptive Planning: Strategy and Vision

HCM

Finance

Speakers

Chris Wada, Bill Guilmart, Cody Johnson (Workday)

Why This Session Matters

Planning needs to match the speed of the business. Teams want continuous, cross-functional planning with fewer spreadsheets, faster decisions, and clear governance. This session shows how Adaptive Planning is using AI, collaboration, and new apps to connect HR and Finance and move from static cycles to always-on planning.

What Was Covered

The session framed planning as a team sport across finance, HR, and the business. Workday introduced the Planning Agent, now in early adopter, to help analysts, planners, modelers, and admins interrogate data, generate insights, and automate steps with human oversight. Demos highlighted Shared Scenarios for multi-persona what-ifs, a Headcount Planning application that reconciles roster and to-be-hired with live HCM refresh, and upcoming Organizational Design and Scenario Modeling to restructure teams with real-time span-of-control and cost impact.

User experience advances focus on collaboration and flow. Tagged comments and Slack notifications bring context to decisions, with Microsoft Teams on the roadmap. Planning Hubs centralize assets, metrics, and integrations for a process, while a visual Workflow builder orchestrates submit and approve steps. Ask Workday gives natural-language help and launches agent skills for data exploration, anomaly detection, variance analysis, formula creation, and on-the-fly scenario generation.

Workday Adaptive Planning: Strategy and Vision

HCM

Finance

Key Announcements & Takeaways

- Planning Agent (early adopter): Role-aware assistant for analysts, planners, modelers, and admins that analyzes KPIs, drafts insights, creates scenarios, and automates tasks with human approval.
- Shared Scenarios: Create a scenario, share it with operations or regional owners, collect inputs, and merge back to plan; adoption already strong.
- Headcount Planning app:
  - Unified views for HR and Finance, including roster vs to-be-hired, cost of workforce, FTE and headcount KPIs.
  - Add positions or plan by headcount in bulk; system auto-creates to-be-hired lines and IDs for reconciliation.
  - Refresh Actuals from HCM on demand to keep plans current during the cycle.
- Organizational Design and Scenario Modeling (target 26R1): Model restructures with drag-and-drop moves, create new teams, track spans and layers, and see cost/location impacts instantly.
- Collaboration in the flow: Comment threads tied to dashboards and filters; Slack notifications today, Teams planned.
- Planning Hubs: One place per planning process for sheets, reports, dashboards, integrations, KPIs, and insights, with last-sync status and run-now options.
- Visual Workflows (target 26R1): Drag-and-drop tasks, assignees, and multi-step approvals; monitor progress and due dates.
- Ask Workday + agent skills:
  - Data exploration and variance analysis with context awareness from the current report or model.
  - Modeler assist to generate transparent formulas (for example EBITDA) and apply them system-wide.
  - Executive “what-if” generator to propose lever-based scenarios, add to dashboards, and compare outcomes.
- Operating model shift: Continuous, connected planning across HR and Finance reduces spreadsheet sprawl, speeds decisions, and aligns strategy with execution.

Workday Financial Management: Strategy and Vision

Finance

Speakers

Rob Zwiebach, Mark Rosenberg, Nadia Agsa, Aidan Mitchell (Workday)

Why This Session Matters

Finance teams need faster close, cleaner controls, and more time for decisions. Workday is adding AI, agents, and new data models to automate routine work and raise confidence in the numbers. FP&A, controllers, and operations leaders will find practical updates they can deploy with clear ROI.

What Was Covered

The session framed four themes, apply AI and hyper-automation, serve global compliance, monetize innovation, and unlock the Workday data economy. In opportunity-to-cash, Contract Intelligence and Negotiation agents turn static contracts into structured data, while a new Revenue Contract Agent creates contract records, explains decisions, and applies pricing or discounts. Revenue Center handles usage-based pricing at scale and is adding advanced revenue recognition with a formula builder. Collections letters get GenAI for faster, personalized outreach.

In record-to-report, Accounting Center continues to automate detailed accounting from operational data, with strong customer results. A new AI-powered Account Reconciliation workspace builds and advances reconciliations inside Workday. A Financial Test Suite and Audit Agent continuously test for risks, hold suspect transactions, and assemble audit evidence with a test marketplace. Global capabilities expand with delivered tax packages for many countries and a coming Global Tax Hub with anomaly detection. Reporting gains conversational analysis, and a new Cost and Profitability Management solution uses AI to set allocation rules and analyze product, channel, or regional profitability.

Workday Financial Management: Strategy and Vision

Finance

Key Announcements & Takeaways

- Opportunity to Cash
  - Contract Intelligence and Negotiation agents extract key terms, surface milestones, and centralize documents from sources like SharePoint or CRM.
  - Revenue Contract Agent creates Workday contracts from documents, explains effective dates and discounts, applies pricing to billing schedules, and will propose revenue recognition and accounting.
  - Revenue Center supports complex usage and tiered pricing; next adds fair value price lists and revenue allocations in Workday.
  - GenAI collections letters cut write time per letter and lift follow-up capacity.
- Record to Report and Assurance
  - Accounting Center automates journal creation from operational systems, reducing manual entries and night audits while improving insight.
  - AI Account Reconciliation creates reconciliations, rolls forward items, tracks aging, and speeds approvals inside Workday.
  - Financial Test Suite and Audit Agent monitor processes, flag overpayment or policy risks, pause items, recommend tests, and compile PBC packages.
- Global and AP
  - Delivered country tax configurations expand, accessible in Customer Central; Global Tax Hub centralizes tax tasks with anomaly detection.
  - AP investments continue, including an AP Reasoning Engine for non-PO invoices that learns from policies and analyst feedback, with OCR and workspace improvements.
- Analytics and Profitability
  - Conversational reporting answers plain-language questions on existing reports, shows logic, and supports full-screen exploration.

  - Cost and Profitability Management introduces AI-assisted allocation rule setup and transparent profitability views by any business dimension.
- Proof points and scale
  - 2,400+ financials customers on one code line, 370+ go-lives this year, strong Accounting Center adoption and time savings reported across industries.
- What to do now
  - Use Contract Intelligence and the Revenue Contract Agent to cut time to billing readiness and reduce errors.
  - Move more subledger work into Accounting Center; adopt AI Account Reconciliation to shrink close effort.
  - Turn on GenAI collections, pilot the Financial Test Suite and Audit Agent, and plan for Global Tax Hub.
  - Start conversational reporting for faster answers, then evaluate Cost and Profitability Management to inform pricing and cost takeout.

Workday Spend Management: Strategy and Vision

Finance

Speakers

James Grimes, Shane Clifford (Workday)

Why This Session Matters

Procurement teams must deliver savings, speed, and compliance while the business expects guidance, not gatekeeping. This session explains how Workday is using AI, contract intelligence, and unified data to move from manual tasks to outcomes. It is useful for CPOs, procurement leaders, AP leaders, and finance partners who want practical wins now and a clear roadmap.

What Was Covered

The speakers set a simple focus, achieve three outcomes, agility and resilience, value beyond cost, and effortless compliant procurement. Recent releases concentrated on automation from intake to pay, including intelligent intake as a single front door with AI guidance, stronger invoice capture and PO line linking, and early steps toward touchless service invoices. Risk and compliance deepen with new supplier risk data, legal playbook reviews in CLM, and automatic receipt to card matching in Expenses.

Strategy points connect contracts, sourcing, AP, inventory, and analytics on one platform. Contract Intelligence exposes terms, rebates, and cycle bottlenecks; Business Views and conversational reporting give fast insight without building new reports; supply chain features improve replenishment and route planning. Two agent directions stood out, AI RFP Evaluation to summarize and score responses against your criteria, and a Supplier Contract Agent that goes from guided intake to negotiated clauses, then auto-creates schedules, rebates, and checks performance against the live contract.

Workday Spend Management: Strategy and Vision

Finance

Key Announcements & Takeaways

- Intelligent Intake (front door)
  - One place for business users to request buys or contract work; AI routes to the right path based on plain-language scenarios.
  - Early adopters report higher compliance and fewer rogue purchases. Now generally available.
- Invoice automation and AP
  - OCR and email ingestion reduce data entry; machine learning links invoice lines to PO lines with a fast UI for exceptions.
  - Roadmap focus on touchless service invoices using LLMs to interpret service language.
  - In-app AP–buyer collaboration threads replace email and keep a traceable rationale to improve future auto-match.
- Contract intelligence and CLM
  - Deep integration of CLM with AI legal playbook review to flag deviations, suggest redlines, and surface hidden value like rebates.
  - Contract Insights lets teams build custom AI models and dashboards over contract terms and spend, no heavy setup.
- Supplier risk and compliance
  - New D&B risk signals (financial outlook and short-term stability) join existing partners for fraud, infosec, and ESG; signals can drive negotiation terms.
  - Automatic receipt and corporate card transaction matching improves expense policy adherence.
- Supply chain and T&E data
  - Distribution network enhancements for par and inventory replenishment across multi-company setups.
  - Wave picking with delivery route planning reduces fuel and time.
  - Consolidated Travel and Expense Business View brings T&E into one model for trend, vendor negotiation, and budget control.

Workday Spend Management: Strategy and Vision

Finance

- Analytics for action
  - Business Views unify procurement and supplier data for fast reporting.
  - Conversational reporting answers questions on existing reports and explains logic; no new report build needed.
  - Self-Service Agent surfaces context and completes tasks in natural language inside Workday.
- Two big AI directions
  - RFP Evaluation, summarize long responses and auto-score against your criteria; drill into the clauses that matter.
  - Supplier Contract Agent, guide intake to SOW, factor supplier risk into clauses, recommend spend categories, generate invoicing schedules, track rebates, and monitor contract performance.
- Practical extras teams can use now
  - Expenses, multi-point mileage, digital receipt ingestion via merchants, and attendee prompts to speed audits.
  - Inventory and replenishment can automatically pick best sites or create POs when needed.
- Bottom line
  - Start with intelligent intake and invoice automation for quick wins.
  - Turn on contract intelligence and Business Views to find value beyond price.
  - Pilot AI RFP Evaluation and the Supplier Contract Agent to move from assistance to action, with human approval kept in the loop.

Workday Build Strategy and Vision

IT

Speakers
Mariana Alvaro, Jay Wieczorkowski, Jonathan Boyne, Ryan Basilio, Brian Carlo, Krupa Natarajan (Workday)
Chris Cameron (PwC)

Why This Session Matters
Workday Build is the developer platform for people, money, and agents. It brings AI-assisted building, secure data interoperability, and a growing marketplace into one strategy. If you develop, integrate, or govern on Workday, this session shows how to deliver faster with guardrails and measurable impact.

What Was Covered
The team framed three pillars: tools to build, an open marketplace, and a strong developer community. Demos showed Workday Developer Copilot generating code, WQL, and orchestrations for a live employee-recognition app, then adding AI widgets to improve message quality. Orchestrate connected the flow end to end, and Extend Cards placed the app directly on Workday home. Flowise Agent Builder created agents on top of these apps, with an example that listed charities and posted donations with payroll input applied automatically.

Workday Data Cloud introduced zero-copy access to trusted people and money data. Prism blended Salesforce objects as Apache Iceberg tables with Workday data, then Workday Assistant answered questions and triggered actions like assigning a negotiation course. The marketplace story highlighted partner solutions built on Workday, while the community segment covered certifications, DevCon growth, and the new Developer MVP program. Customer outcomes grounded the vision, for example Instacart's 90% manager-engagement lift from an Extend app and Lyft's 3,000 hours saved using location-based compensation insights.

Workday Build Strategy and Vision

IT

Key Announcements & Takeaways

- Workday Developer Copilot
  - AI companion to find APIs, generate pages and scripts, write WQL, and even draft orchestration steps.
  - Reported up to 50% developer productivity gains in early use.
- AI building blocks for apps
  - AI widgets to refine text in-app and deliver consistent manager and employee messages.
  - Extend Cards place custom experiences on home, hubs, Journeys, and search results.
- Orchestrate for everyone
  - Low-code orchestration to connect Extend, BPs, APIs, and AI services; GA to all Workday HCM, Financials, and Student customers.
- Agents, built in
  - Flowise Agent Builder embedded in Workday; create agents that call orchestrations and apps through Agent Gateway.
  - Agent System of Record to register, govern, and observe agents as a managed fleet.
  - Modern protocol support, including MCP, across the API platform.
- Workday Data Cloud
  - Zero-copy architecture to access people and money data with governance.
  - Workday Data Lake and Live Data Query provide SQL over a curated catalog via Apache Iceberg.
  - Two-way pattern, bring external data from platforms like Databricks, Snowflake, and Salesforce into Workday context without heavy ETL.
- Prism Analytics in action
  - Blend Salesforce and Workday to analyze ramp time, commission attainment, and skills; trigger actions like assigning learning.

Workday Build Strategy and Vision

IT

- Marketplace momentum
  - Rapid growth in Built on Workday listings; partners deliver industry apps with ongoing updates.
  - PwC examples, incentive-comp applications that combine Extend and Prism for configurable calculations.
- Community and scale
  - 15,000+ active Workday builders, expanded certifications, bigger DevCon, and Developer MVPs recognized.
- What to do next
  - Use Copilot and Orchestrate to speed prototypes into production with documentation and guardrails.
  - Stand up agents with Flowise on top of your apps and orchestrations, govern them in the Agent System of Record.
  - Turn on Data Cloud patterns to connect Workday with your enterprise data tools and drive insight-to-action inside Workday.
  - Evaluate marketplace apps where you can buy, not build, then extend where unique.

Workday User Experience: Strategy and Vision

IT

Speakers
Paul Stokes, Laila Almounaaier, Becky Roth (Workday)

Why This Session Matters
Employee experience drives trust, adoption, and value from Workday. This session shows how AI, voice, and interoperable agents make Workday simpler, faster, and more consistent across web, mobile, Slack, Teams, and partner ecosystems. It is useful for HR, IT, and operations leaders who want quick wins they can turn on now, plus a roadmap to an effortless, brand-aligned UX.

What Was Covered
Workday's UX strategy rests on three themes: AI-powered interactions, a unified and configurable experience, and role-based design. Ask Workday becomes the conversational copilot across 75+ workflows, moving beyond Q&A to complete tasks like leave setup, payslip explanations, and contract insights. Search and the homepage were rebuilt for speed and clarity, with AI now powering most successful searches and quick actions driving faster task completion.

Interoperability extends Workday into daily tools. Workday agents integrate with Microsoft Copilot, Salesforce Agentforce, and Google Agent Space; trusted third-party agents like Glean can operate inside Workday. Workday Everywhere in Slack and Teams shortens approvals and brings the Self-Service Agent to chat. The platform unifies experiences with Task Unification, custom search topics, tenant branding controls, and Admin Hubs. New admin intelligence includes Adoption Planning and Recommendations and a Business Process Optimization Agent to remove bottlenecks at scale. Role-based design shows frontline voice flows for scheduling and absence via mobile and messaging, while professionals get AI-dynamic pages they can tailor and share.

Workday User Experience: Strategy and Vision

IT

Key Announcements & Takeaways

- AI and conversational experience
  - Ask Workday is the side-panel copilot that answers, guides, and completes tasks; examples include maternity leave orchestration and payslip comparisons.
  - Revenue and supplier contract insights surface milestones, rebates, and actions directly in context.
  - Early adopters report measurable case deflection from Ask Workday and faster time to task.
- Speed wins you can enable now
  - Search, AI powers about 70% of successful searches, reducing tickets.
  - Homepage quick actions make common tasks faster, for example absence requests about 50% quicker in early programs.
  - Workday Everywhere, managers approve 2–3x faster in Slack/Teams; employee engagement lifts markedly.
- Unified, branded, and configurable
  - Task Unification consolidates to-dos across Workday and beyond into one list.
  - Custom search topics map your language to Workday or external tasks.
  - Branding controls expand, primary buttons, modern profiles, palettes from your logo with accessibility-aware suggestions.
- Admin intelligence and governance
  - Admin Hubs centralize security, Agent System of Record, and configuration with live AI cards.
  - Adoption Planning and Recommendations highlight high-value features to turn on, with data-driven prioritization.
  - Business Process Optimization Agent benchmarks 800+ processes, recommends changes, and shows impact; example improvement from 45 hours to 10 hours for Change Job completion.
  - Deployment assistance in Ask Workday gives contextual configuration guidance.

Workday User Experience: Strategy and Vision

IT

- In the flow of work, inside partner ecosystems
  - Microsoft Copilot, personalized development plans from Workday data in 365.
  - Salesforce Agentforce + Slack, view and update Workday goals alongside pipeline details.
  - Google Agent Space, instant team expense breakdowns and policy nudges.
  - Trusted partner agents, like Glean, can act within Workday with governance.
- Frontline experience and messaging
  - Mobile flows for clock-in, tasks, policy answers, and voice-driven scheduling.
  - Workday Messaging expands, WhatsApp early adopter targeted by year-end; RCS planned.
  - Mobile scale, millions of active users with strong ratings; one in four users are mobile-only, so enable mobile first.
- Professional workspaces
  - AI-dynamic pages let recruiters, HR, and finance rearrange, pin, and share role-specific views without leaving Workday.
- What to do next
  - Turn on AI-enhanced search, homepage quick actions, mobile, and Workday Everywhere for immediate gains.
  - Enroll in early adopters for Ask Workday, agent integrations, and Task Unification.
  - Use Admin Hubs, Adoption Planning, and the BP Optimization Agent to harden governance and remove friction at scale.

Workday Student: Strategy and Vision

Student

Speakers
Sam Singhal, Marlene Scholtz, Joellen Shendy, Mike Hofherr (Workday)

Why This Session Matters
Higher education is managing enrollment swings, funding pressure, and rising student expectations. Student teams need simpler experiences for registration and aid, faster staff tools, and AI that reduces manual work. This session sets a clear path for Workday Student, what is new now and what is coming soon, so institutions can improve outcomes without adding systems.

What Was Covered
The session focused on end-to-end student experience, staff productivity, and an AI roadmap. For students, Workday is introducing a modern landing experience with clear next steps, document upload, and financial aid tasks in one place. Registration gets a new conflict-free "safe schedule" builder with richer course details and a visual calendar preview, designed to cut errors and stress.

For staff, advisors receive a troubleshooting console for academic progress and registration rules, plus a generative AI summary that explains issues and paths to resolution. Financial aid and student accounts see real-time updates to charges, waivers, and refunds to reduce back-and-forth. A new Student Administration Agent handles heavy workflows such as transfer credit evaluation and student communications, with a forward look at agent-assisted grade collection from faculty. The team also highlighted flexible learning support, veterans' use cases, partner apps for state compliance reporting, multi-time-zone readiness, and expansion to the UK and Ireland. Customer stories showed measurable outcomes, including freed funds redirected to scholarships and a 91% advising satisfaction score after redesigning advising with Extend and Student.

Workday Student: Strategy and Vision

Student

Key Announcements & Takeaways

- Student experience, simpler and faster
  - New getting-started landing experience with action items, document upload, and integrated financial aid tasks (EA in 26R1, GA in 26R2).
  - Safe schedule builder for registration, one place to search sections, review details, choose grading basis, preview a conflict-free week, then finalize.
  - Academic planning remains collaborative and transparent, reducing last-minute registration stress.
- Advisor and registrar productivity
  - Academic Progress troubleshooting console, with a generative AI summary that explains requirement conflicts and next steps (25R2).
  - Real-time student account updates, charges, waivers, and refunds flow immediately to reduce service tickets.
- Student Administration Agent (first student-focused agent)
  - Supports registrar, bursar, and financial aid teams; monitors transcript status, prompts students for final docs, and suggests transfer-credit equivalencies when rules are missing.
  - Early direction for faculty grade collection, agent drafts and sends reminders, then records grades with faculty approval.
- Flexible programs and special populations
  - Support for continuing and non-degree pathways and tighter flows for student veterans.
  - Integration patterns to handle noncredit programs and third-party experiences where desired.
- Compliance and partner ecosystem
  - Partner-built apps for state reporting keep Workday aligned with evolving requirements; institutions reported significant time savings.
  - Multi-time-zone readiness and geographic expansion, including UK and Ireland support in progress.

Workday Student: Strategy and Vision

Student

- Proof points and outcomes
- Institutions redirected budget to student success and scholarships after visibility gains.
- Advising redesign with Extend and Student drove higher registration and 91% student satisfaction.
- What to do next
- Pilot the new landing and registration experiences for the next term.
- Equip advisors with the troubleshooting console and AI summaries.
- Start with the Student Administration Agent on transfer credit, then expand to additional workflows as adoption grows.

Product Insights

Practical innovations that matter this and next year

A Deeper Dive into the AI-Driven Future of Payroll with Payroll Agent

HCM

Speakers

Ryan Claxton (Workday)

Why This Session Matters

Payroll teams spend too much time on manual inputs and spreadsheet wrangling, which creates errors, rework, and compliance risk. This session shows how the Workday Payroll Agent reduces manual entry, brings inputs to payroll with control and audit, and sets up a path from request to approval with less back-and-forth. It is useful for payroll leaders, HRIS, and operations teams looking for fast cycle-time and accuracy gains.

What Was Covered

The session deep-dived one Payroll Agent skill and previewed a second. First, Payroll Input Requests: managers and other non-payroll users can request one-off inputs, guided by Ask Workday, with the agent filling key fields like the next unprocessed payroll date and pay component defaults. Payroll stays in charge through a governed business process, reviews the summarized interaction, edits if needed, and approves. The example used a taxable gift card where a manager submitted from mobile and the payroll admin received a complete, auditable request in Inbox. Early results indicate significant time saved on common tasks like Add Payroll Input by Worker.

Second, the roadmap: AI-assisted spreadsheet transformation. Business teams upload non-payroll spreadsheets, pick a payroll-defined template with allowed pay codes and rules, add simple mapping instructions, then let the agent convert the file into a validated payroll input EIB for payroll to review and post. The goal is to replace multi-hour spreadsheet work and error chasing with a controlled, in-Workday flow. The input request skill is in early adopter with a general availability target of 26R1; spreadsheet transformation is an active design direction.

A Deeper Dive into the AI-Driven Future of Payroll with Payroll Agent

HCM

Key Announcements & Takeaways

- Reduce manual entry
  - Payroll Input Requests let non-payroll users submit governed, one-off inputs; Ask Workday guides them, fills dates, and enforces allowed pay components.
  - The agent adds a human-readable summary of the conversation so payroll can audit quickly and correct before approval.
- Keep payroll in control
  - All requests run through a dedicated business process with configurable approvals, defaults, and edits by payroll.
  - Security and templates restrict who can request what, for example allowed pay codes, one-time vs recurring, run category, and defaulted start or end dates.
- Example in practice
  - Manager records a $150 gift card on mobile; the agent classifies it as a taxable earning, sets the correct run, and creates a request.
  - Payroll admin reviews the summary, validates net-to-gross settings, adjusts if needed, and approves.
- Spreadsheet transformation (roadmap)
  - Non-payroll teams upload source files; the agent maps worker IDs, locations, and pay codes, and produces a payroll input EIB.
  - Payroll reviews both original and transformed files, assigns batch IDs, and posts inputs without external tools.
- Expected impact
  - Meaningful reduction in time spent on Add Payroll Input by Worker and on email or ticket ping-pong.
  - Early design studies suggest multi-hour savings per pay cycle for commission or bonus uploads.
- How to act
  - Identify top one-off inputs and enable Payroll Input Requests with tight templates and approvals.

  - Draft templates for high-volume spreadsheets, define allowed pay codes and mapping rules, and prepare teams to pilot the transformation flow.
- Timing
  - Payroll Input Requests, early adopter now with a 26R1 GA target.
  - Spreadsheet transformation, active development with future release timing to be announced.

AI-Powered Hiring: Drive Results with Workday Talent Acquisition

HCM

Speakers
Fiona Melrose (Workday)

Why This Session Matters
Most teams still lose time on manual requisitions, chasing interview feedback, and reusing the same interviewers. This session shows concrete AI skills in Workday Talent Acquisition that reduce clicks, speed decisions, and keep humans in control. TA leaders, HRIS, and hiring managers will find practical improvements they can activate and measure.

What Was Covered
The session followed a real hiring journey with a manager and recruiter, highlighting three AI skills. First, Job Requisition Creation, a conversational flow in the manager's daily tools (for example Microsoft Teams) that knows backfill details and defaults, creates the requisition, and moves the user into Workday for review and submit. Teams can quantify impact by tracking manager productivity and time saved.

Second, Interview Team Optimization recommends interviewers based on role needs and current load, with explainability and alternates. This broadens panels, reduces fatigue, and removes bottlenecks. Third, Interview Feedback Summarization condenses all interview notes into a clear summary so recruiters and managers can move faster while keeping drill-down to full feedback when needed. The demo also showed internal rediscovery using HiredScore to bring strong past candidates into the funnel, then using the summary to advance to offer. Early adopter programs are live, with a 26R1 target for general availability. The team closed with change-management guidance and noted Workday's intent to bring Paradox into a single AI-powered TA solution across personas.

AI-Powered Hiring: Drive Results with Workday Talent Acquisition

HCM

Key Announcements & Takeaways

- AI skills across the hiring flow
  - Job Requisition Creation, conversational creation with data-aware defaults, then human review and submit in Workday.
  - Interview Team Optimization, intelligent, explainable interviewer recommendations with alternates to prevent burnout and bias.
  - Interview Feedback Summarization, concise, AI-generated summaries with full drill to original notes.
- Measurable impact
  - Requisition time drops from about 5.5 minutes to seconds when created in the flow of work.
  - Interview throughput improves by removing panel bottlenecks; teams can track speed and interviewer engagement.
  - Feedback review time compresses significantly for each role, accelerating decisions and improving candidate experience.
- In the flow of work
  - Managers act in tools like Microsoft Teams, then finalize in Workday to keep governance and audit.
- Internal talent first
  - HiredScore-powered rediscovery surfaces proven candidates directly in the requisition, supported by summarized prior feedback.
- Adoption guidance
  - Do not roll out AI alone, build a cross-functional group with architects and change leaders; focus on clear outcome metrics.
- Availability and roadmap
  - All three skills are in early adopter; GA targeted for 26R1 with designs refined through customer feedback.
  - Strategic direction to unify conversational experiences across all hiring personas with Workday's ecosystem.

Innovations in Time Tracking, Absence, and Scheduling

HCM

Speakers
Punam Gupta (Workday)

Why This Session Matters
Frontline teams lose time and money on no-shows, manual schedule changes, and time approvals. Managers often default to texts, not enterprise apps, which creates gaps and payroll fixes. This session explains how the new Frontline Agent uses SMS, Workday rules, and automation to replace manual scramble work with fast, auditable flows.

What Was Covered
The session showed how Frontline Agent handles absence and shift coverage end to end through SMS. A worker texts they are out, the agent confirms the absence, notifies the manager, recommends qualified replacements based on availability and rules, and reassigns the shift once a worker accepts. Managers can ask for more suggestions or post to the shift board, all via SMS, with changes reflected in schedules automatically.

Workday previewed a broader roadmap: bulk shift adjustments that respect labor laws and overtime, team time actions to enter and approve time in bulk with AI anomaly detection, and self-service time uploads where the agent maps CSV fields to Workday values. The Agent System of Record centralizes enablement, security, and monitoring for Frontline Agent and other agents. Early adopters report faster coverage and more time for managers to be on the floor. General availability for shift replacement is targeted for 26R1. Required SKUs to adopt include Absence, Messaging, and Scheduling.

Innovations in Time Tracking, Absence, and Scheduling

HCM

Key Announcements & Takeaways

- SMS-first scheduling and absence
  - Workers report absences by text; the agent confirms and creates the absence.
  - Managers receive ranked replacement suggestions with reasons; one tap to confirm and reassign.
  - Option to post the shift to the shift board if recommendations are not ideal.
- Manager control with less effort
  - Ask for more recommendations or propose a specific worker; the agent executes and keeps everyone informed.
  - All actions are tracked and auditable; updates flow to schedules without extra clicks.
- Scale features that cut admin time
  - Bulk Shift Adjustment, extend or swap many shifts at once, with guardrails for labor laws, availability, and overtime.
  - Team Time skill, enter and approve timesheets in bulk; focus only on AI-flagged anomalies.
  - Self-service CSV time upload for workers; the agent maps fields to Workday values to reduce manual entry.
  - SMS alerts planned for uncommitted time and missed punches.
- Adoption and governance
  - Managed through the Agent System of Record for registration, activation, and monitoring.
  - Early adopters live; shift replacement GA target is 26R1.
  - Prerequisites to start, Absence, Messaging, and Scheduling.
- Impact signals to expect
  - Replace the typical 15 minutes per no-show with automated coverage flows.
  - Big reductions in manual time approvals; focus effort on exceptions, not the bulk of entries.
  - Better frontline experience, fewer app logins, more work completed in the channel managers and workers already use, SMS.

Beyond Enrollment: Cultivating Continuous Wellness

HCM

Speakers
Alvin Cadman (Workday)

Why This Session Matters
Most organizations treat benefits as a once-a-year task, then engagement drops and employees miss support when life events happen. This session explains how to shift from annual enrollment to continuous wellness, using Workday Wellness to connect partners, simplify admin, and guide employees in the moments that matter. HR and benefits leaders will find practical patterns they can use to raise utilization and outcomes.

What Was Covered
The session reframed benefits as an ongoing experience. Workday Wellness creates one connected platform between employees, HR, IT, and a curated ecosystem of wellness and insurance partners. Standardized APIs, use-case level authorization, and shared data enable secure, real-time exchanges so admins set up once and scale across partners.

Three high-value journeys were highlighted. Connected Absence links Workday with third-party leave administrators so employees see claim status and updates in Workday, navigate via SSO, and use unique claim IDs for transparency; HR gets standardized integrations for request, manage, and return. Evidence of Insurability moves from manual follow-ups to an in-Workday task at the point of election, with real-time carrier status and admin visibility. Education and awareness use partner messages and targeted nudges delivered inside Workday so employees act on programs at the right time, not only during enrollment. The talk closed with the growing partner ecosystem across physical, mental, financial, and social wellbeing, and clear business impact from better engagement.

Beyond Enrollment: Cultivating Continuous Wellness

HCM

Key Announcements & Takeaways

- Continuous wellness over one-time enrollment
  - Meet employees in life moments with timely guidance, not once-a-year information dumps.
  - Use right-time nudges and connected systems to lift awareness and utilization.
- Workday Wellness platform, built for scale and simplicity
  - One place to manage wellness partners with standardized APIs and use-case based authorization.
  - Shared data and AI insights connect HR, IT, partners, and employees in real time.
- Connected Absence, end-to-end flow
  - Automatic routing to the correct leave partner with SSO.
  - Real-time claim status and unique IDs visible in Workday; standardized integrations for request, manage, and return.
- Evidence of Insurability, fewer delays
  - Trigger EOI at election with a Workday inbox task; employees respond immediately.
  - Real-time carrier updates in Workday; admins choose auto-trigger or controlled timing and monitor status.
- Education and worker communications, action in the flow of work
  - Partner-published cards and messages appear in Workday to prompt enrollments, program use, and next steps.
  - Reduces HR re-education and drives ongoing engagement across wellbeing programs.
- Outcomes you can defend
  - Higher utilization and measured business impact, including reduced healthcare costs, productivity gains, fewer absences, and better retention.
- What to do next
  - Start with connected absence and EOI to remove common friction points.
  - Enable in-Workday communications for targeted nudges.
  - Consolidate partner management through Workday Wellness to scale without adding complexity.

Career Sites That Convert: Captivate, Connect, and Hire Top Talent

HCM

Speakers

Twila Long (Workday)

Why This Session Matters

Career sites and candidate journeys directly influence offer acceptance and brand perception. A great experience raises conversions and reduces drop-off; a poor one hurts reapplications and spreads quickly online. This session focuses on practical changes in Workday that help TA and HR teams attract, engage, and convert more candidates with less friction.

What Was Covered

The session outlined Workday's vision to be a global career destination that personalizes every step, powered by data and AI. The external career site, candidate home, and candidate engagement (CRM) work together so candidates see status, complete tasks, and get relevant prompts without chasing recruiters. At scale, 90% of customers use the delivered career site; Workday processed 356 million applications in the last year and sees about 28 million monthly visits to candidate home.

Product investments center on a faster, smarter apply. Candidates can view job insights to gauge fit, compare skills by resume, and use Apply with AI to surface better-fit roles. Mobile experiences now support assessments and single sign-on with social accounts. Admins gain more control over prospect and event forms, plus stronger event management to build warm pipelines. The roadmap adds single-page quick apply and deeper personalization to meet the needs of five active workforce generations.

Career Sites That Convert: Captivate, Connect, and Hire Top Talent

HCM

Key Announcements & Takeaways

- Smarter discovery and apply
    - External Job Insights show a candidate's likely fit before applying.
    - Apply with AI recommends additional roles using the uploaded resume.
    - Apply once to multiple jobs using the same parsed resume and required consents.
- Mobile-first experience
    - Full mobile support for questionnaires and assessments.
    - Social sign-in in preview for Google and Apple; LinkedIn planned as a fast follow.
    - Existing accounts reconcile automatically when the email matches.
- Candidate engagement and events
    - Prospect "Introduce Yourself" and event registration forms expanding with more configurable fields like preferred locations and job areas.
    - Event management improvements, waitlists, automatic enroll when space opens, reminders, attendee limits, and registration windows.
- Admin and brand control
    - Rich branding on the external site, colors, images, video, and content to tell your culture story.
    - Candidate home reduces "status" tickets with self-service task completion and application tracking.
- Quick apply direction
    - Single-page apply experience to remove orchestration clicks while honoring your existing configuration; design partner program opening.
- Practical guidance
    - Revisit job applications, remove nonessential fields, capture extra info later via tasks.
    - Maximize current features before buying add-ons; use targeted nudges and personalized content to lift conversions.

Current and Future State of AI with Workday Learning

HCM

Speakers

Alan Gray (Workday)

Why This Session Matters

Learning teams are shifting from compliance to upskilling, and AI is changing how content is created, discovered, and measured. This session outlines a pragmatic path to use AI with Workday Learning, including near-term capabilities through the Sana partnership and a longer-term vision for personalized, outcomes-driven learning. L&D, HR, and HRIS leaders will find ways to reduce admin effort, speed content delivery, and shorten time to skill.

What Was Covered

The session framed a research-led vision for AI in learning, based on feedback from dozens of customers. Top needs are better discovery and personalization, faster collaborative authoring, and admin efficiency with stronger insights. Workday's approach pairs Workday Learning with Sana to deliver immediate wins, AI dashboards and conversational insights, accelerated content authoring from source files, and an AI tutor to drive engagement.

Looking forward, Workday outlined an AI learning model with six parts, AI-powered admin and insights (risk monitoring, schedule recommendations, catalog strength), needs profiling from Workday data and opted-in signals, smarter discovery that can return an answer or a plan, continuous performance assessment to replace completion as the metric, dynamic pathway creation from existing catalogs, and a one-to-one tutor that guides planning and consumption. Prototypes showed an AI tutor prompting from a development goal, generating a tailored pathway, building placement questions, skipping known content, and even converting preferred formats, for example podcast versions. The session closed with how to measure success, time to skill, content creation time, and real business outcomes.

Current and Future State of AI with Workday Learning

HCM

Key Announcements & Takeaways

- What you can use now
  - Deeper integration with Sana to accelerate content creation from PDFs and SCORM, support multi-language translation, and enable SME collaboration at scale.
  - Conversational insights and dashboards, ask questions and auto-generate reports to track learning impact.
  - AI tutor experiences to boost engagement, quiz, summarize, explain, and nudge post-completion.
- Admin and governance wins
  - AI risk monitoring, predict who will miss deadlines and target interventions.
  - AI scheduling, recommend sessions from demand signals such as assignments, waitlists, and expressed interest; human approves.
  - Catalog strength analysis, align content supply to skills demand and quality signals.
- Personalization model
  - Needs profiling from Workday data (goals, performance, history); optional opt-in signals for richer context over time.
  - AI-powered discovery, return answers or plans, not only courses.
  - Continuous performance assessment replaces "course completion" as the north star.
- Dynamic pathways from your catalog
  - Tutor asks intent, time available, preferences; composes a pathway; generates placement checks to skip known material.
  - Learner format choice, prototype showed auto-converting content into preferred media, for example podcast.
- Research signals shaping the roadmap
  - Customers ranked discovery and personalization first, followed by content creation and catalog management, then reporting and admin efficiency.
  - Upskilling has overtaken compliance; AI should cut time to capability, not just add more content.

- How to measure impact
  - Business outcomes, improved job performance, revenue, customer satisfaction.
  - Learning metrics, reduced content creation time, faster time to skill, better knowledge retention through ongoing quizzes and summaries.
- Practical next steps
  - Start with Sana-powered authoring, translation, and the AI tutor to lift engagement quickly.
  - Turn on admin insights for risk monitoring, scheduling recommendations, and catalog strength.
  - Pilot needs-based pathways for one priority skill, and define time-to-skill as the key KPI.

Drive Strategic Workforce Decisions with Total Workforce Planning

HCM

Speakers
Eric Macasieb (Workday)

Why This Session Matters
Workforces now include employees, contingent workers, and AI agents. Many organizations still plan only for employees, which distorts budgets, hiring, and skills decisions. This session shows how to plan the whole workforce in one model, compare staffing mixes, and act faster with Workday's connected tools.

What Was Covered
The session defined total workforce planning as a single approach to plan, execute, and analyze across all workers, not just FTEs. Workday HCM and Workday VNDLY are positioned as the system foundation, giving a bidirectional flow of governed data so contingent workers light up across Recruiting, Scheduling, Sourcing, Prism, and Adaptive Planning. The speaker walked through a maturity model, from fragmented employee and VMS views to a unified, near real time connection where HR and Finance can answer headcount, cost, and mix questions in seconds.

Two planning patterns were emphasized. Proactive planning, model supply and demand for all roles, test mixes like five FTE versus three FTE plus two contingent, and see total cost and risk. Reactive reforecasting, handle unplanned exits or demand spikes by quickly shifting mix and re-running cost impacts. Enablers include Ask Workday for conversational questions on workforce data, Predictive Forecaster in Adaptive to anticipate attrition, and Org Design and Scenario Modeling for spans, layers, and cost trade-offs. A new Contingent Sourcing Agent will bring together Workday VNDLY and HiredScore to evaluate contingent talent quickly.

Drive Strategic Workforce Decisions with Total Workforce Planning

HCM

Key Announcements & Takeaways

- Plan one workforce
  - Include employees, contingent workers, and AI agents in the same plan so budgets, skills, and risks are accurate.
  - Use the HCM–VNDLY connection to keep contingent data secure, consistent, and visible across upstream and downstream apps.
- Move up the maturity curve
  - Replace fragmented employee vs contingent processes with a unified model and shared metrics.
  - Aim for near real time visibility so leaders can answer headcount, mix, and cost questions on demand.
- Model mix and cost, then act
  - Compare scenarios like FTE only versus blended FTE and contingent, see total cost and staffing speed.
  - Use proactive planning for expected demand and reactive reforecasting for surges or attrition.
- AI and assistants in the flow
  - Ask Workday lets partners and executives ask plain-language questions without building new reports.
  - Predictive Forecaster helps plan for attrition and hiring backfill needs.
  - Org Design and Scenario Modeling gives HR and business leaders a drag-and-drop way to restructure with instant cost and org-health signals.
- Contingent sourcing acceleration
  - Contingent Sourcing Agent will combine VNDLY and HiredScore to find and grade external talent quickly.
- Practical next steps
  - Light up contingent worker data in Workday and Adaptive first.
  - Define a small set of mix scenarios and standard cost metrics.
  - Enable Ask Workday for leaders; pilot attrition forecasting; use scenario modeling before large reorganizations.

Empower and Retain Talent with AI-Driven Performance and Growth

HCM

Speakers
Grace Cheng (Workday)

Why This Session Matters
Retention, mobility, and manager effectiveness drive real business outcomes. This session shows how Workday uses AI across Career Hub and Manager Insights Hub to remove blank-page work, guide growth, and speed quality feedback. It is useful for HR, HRIS, and people leaders who want measurable gains in internal fill, skill development, and manager productivity.

What Was Covered
The session starts with a people-first strategy, using AI to move from reactive programs to proactive growth. Career Hub aggregates growth opportunities powered by Skills Cloud, mentors, learning, projects, Flex Teams, and jobs. A highlight is GenAI for Development Items, which turns an employee's goal or skill gap into a structured, editable plan with objectives, steps, and summaries. Suggestions also nudge workers on saved career paths to close skill gaps. Career Pathing is live today; company-defined career paths will follow so you can publish official pathways while still allowing exploration.

Manager Insights Hub centralizes team signals and actions. Talent Highlights drafts strengths and opportunities using existing talent data such as reviews, goals, feedback, development items, and skills, so managers enter conversations prepared. Career Pathing for managers arrives next, ensuring manager–employee alignment on aspirations. AI-assisted feedback coaching guides authors to clearer, behavior-based feedback while keeping the writer's voice. Looking ahead, an Enhanced Career Hub will bring reviews, goals, check-ins, and feedback together; GenAI will draft SMART goal descriptions; and AI feedback coaching will extend beyond "Get Feedback on Worker" to anytime feedback. Timing callout, Talent Highlights' character limit expansion is targeted around 26R1.

Empower and Retain Talent with AI-Driven Performance and Growth

HCM

Key Announcements & Takeaways

- Proof points that matter
  - Career Hub customers saw a 15-point lift in development benchmarks; Flex Teams users saw a 20-point lift in learning and new skills.
  - Reported outcomes include $27M saved via internal mobility, 80% of leadership roles filled internally, and double-digit gains in internal fill rates.
- Career Hub, from intent to plan
  - GenAI for Development Items creates structured, editable growth plans from a title or need.
  - Suggested development items and nudges appear in context, including for saved career paths.
  - Company-defined career paths coming, publish official routes while preserving exploratory options.
- Manager Insights Hub, better conversations faster
  - Talent Highlights drafts strengths and opportunities using trusted tenant data; managers review and refine.
  - Career Pathing view for managers aligns goals and next steps with each employee.
  - AI feedback coaching applies the situation–behavior–impact style to raise feedback quality, writer stays in control.
- Experience consolidation
  - Enhanced Career Hub will bring goals, reviews, check-ins, feedback, and custom quick links into one place to reduce context switching.
- Creation accelerators
  - Generate Goal Descriptions uses SMART guidance to kickstart quality goals; early adopter program in motion.
  - AI feedback coaching to expand from requested feedback to anytime feedback.
- Practical steps to act now
  - Turn on GenAI Development Items and train managers to use Talent Highlights as a first draft.

  - Start publishing company-defined career paths when available; pair with skills data you already trust.
  - Use feedback coaching to level up review quality and reduce rewrite cycles.
  - Prepare for the Enhanced Career Hub by cleaning up goals, check-ins, and feedback processes.
- Timeline note
  - Talent Highlights character-limit increase is planned around 26R1; expect improvements before 26R2.

Get Ready for Agentic AI: Building a Strong Talent Optimization Base

HCM

Speakers
Faye Gibson (Workday)

Why This Session Matters
HR is under pressure to do more with less while skills, budgets, and workforce mix keep shifting. This session explains how to build a strong talent optimization foundation in Workday so agentic AI can deliver real outcomes. It is useful for HR, HRIS, talent, and people leaders who want a practical, step-by-step path.

What Was Covered
The session framed a walk, jog, sprint, fly journey. Start with foundations that AI can trust: complete talent profiles, consistent goals and feedback, and Workday Skills Cloud turned on. Elevate the experience with Career Hub for employees and Manager Insights Hub for managers to drive mobility and better coaching. Then expand to skills-based practices across Workday so data, workflows, and insights connect.

Looking ahead, Workday's agentic AI vision spans performance, continuity, career, job architecture, skills, and dynamic talent profiles. Examples included a Job Architecture Agent to map and modernize families after events like M&A, a Talent Profile capability that auto-builds and updates profiles from signals such as projects, feedback, and learning, a Career co-pilot to propose paths and plans, and a Performance Agent that assembles evidence and drafts fair, structured reviews. The thread across all topics was trust, data quality, and transparent governance.

Key Announcements & Takeaways
- Start with a durable foundation
    - Make talent profiles complete: skills, experience, education, goals, feedback.
    - Enable Workday Skills Cloud to power matching and recommendations.

    - Use Career Hub and Manager Insights Hub to turn data into action.
- What high performers do differently
    - Invest in data quality and a skills base; build cross-functional buy-in across HR, Finance, and IT.
    - Lead with trust and transparency; keep humans in the loop for AI outcomes.
- Proven impact signals you can aim for
    - Strong internal mobility outcomes cited, such as multi-million cost savings, higher internal fill rates, and leadership roles filled from within.
- Agentic AI, where Workday is heading
    - Performance Agent drafts evidence-based reviews and reduces bias with clear human oversight.
    - Job Architecture Agent proposes structural changes during reorganizations or integrations.
    - Talent Profile intelligence keeps profiles current by inferring skills and achievements from real work.
    - Career assistant generates personalized pathways and actionable development plans.
    - Workforce continuity focus on risk roles, readiness, and proactive succession.
- How to act this quarter
    - Clean up talent profiles; standardize goals and feedback.
    - Turn on Skills Cloud; pilot Career Hub and Manager Insights Hub.
    - Define governance and success metrics before enabling new AI features.
    - Prepare for agents by mapping high-friction manager and HR tasks where AI drafts can save time.

Global Payroll: Workday on Workday Insights

HCM

Speakers
Melinda McCree (Workday)

Why This Session Matters
Payroll is moving from back-office processing to a strategic function. This session shows how Workday's global payroll capabilities, AI, and automation help small payroll teams operate at enterprise scale with fewer errors and stronger compliance. Useful for payroll, HRIS, and finance leaders seeking faster cycles, better visibility, and lower integration cost.

What Was Covered
Workday's global payroll operating model centers on one system for people and pay, supported by Global Payroll Hub and a centralized vendor for non-native countries. Workday runs native payroll in the US, Canada, and the UK, with Australia next, and consolidates results from third-party payrolls back into Workday for a single source of truth. This reduces interfaces, cuts cost, and gives real-time insight across 34 countries and 19,000+ workers.

Productivity gains come from practical tools. Workday Worksheets consolidates audits and reconciliations into governed, real-time workbooks that also support SOX control. A configurable payroll dashboard exposes the drivers behind results, such as new hires, terminations, state taxes, overtime, and gross pay, with drill-down for action. AI features reduce input and review effort: Data Entry Checks flag outlier amounts at entry, Pay Anomalies learns what to watch, and Workday Assistant deflects payslip questions by explaining net pay in the flow of work. A Compliance Update dashboard shows upcoming changes, impact counts, and documentation so payroll can prepare and partner with benefits and other teams. The roadmap highlights Payroll Compliance Agent capabilities to notify stakeholders and employees when laws change.

Global Payroll: Workday on Workday Insights

HCM

Key Announcements & Takeaways

- One global view
  - Use Global Payroll Hub to monitor third-party runs, act from Workday, and feed results back for analytics and downstream integrations.
  - Consolidating results in Workday lowers vendor interface cost and increases control.
- Proven scale
  - 19k+ employees across 34 countries; 731k payments processed last year; 14k+ W-2s for the US.
  - Native payrolls in the US, Canada, UK, and Australia coming next.
- Faster audits and reconciliations
  - Workday Worksheets centralizes payroll checks with prebuilt pivots and formulas, refreshed in real time, and locked for SOX integrity.
- Insight at a glance
  - Configurable payroll dashboards reveal operational drivers, with drill-through to transactions.
  - Encourage broader use of payroll data for analytics, not only period-end checks.
- Error prevention with AI
  - Data Entry Checks flag abnormal inputs before commit, reducing downstream corrections.
  - Pay Anomalies learns patterns over several cycles, then surfaces exceptions for targeted review.
- Employee self-service that reduces tickets
  - Workday Assistant explains payslips and common questions, lowering inbound inquiries during payroll cycles.
- Compliance readiness
  - Compliance Update dashboard centralizes regulatory changes, documentation, and impacted populations for proactive planning.

  - Coordinate early with benefits and vendors when thresholds or contribution rules change.
- What to do next
  - Feed all third-party results into Workday and standardize on the Hub.
  - Stand up Worksheets for audit packs and reconciliations; publish the payroll dashboard to stakeholders.
  - Enable Data Entry Checks and begin training Pay Anomalies; promote Workday Assistant to employees.
  - Make the Compliance Update dashboard part of your monthly cadence; prepare for Payroll Compliance Agent to automate outreach.

Illuminating Total Rewards with AI

HCM

Speakers

Michael Waddington (Workday)

Why This Session Matters

Total rewards teams spend huge time on clicks, spreadsheets, and one-off tasks. AI agents change the work by executing goals across Workday instead of pushing users through pages and fields. This session is valuable for HR, compensation, and benefits leaders who want to move from task-by-task work to outcome-driven actions with audit and control.

What Was Covered

The session reframed how work gets done in total rewards. Historically, Workday delivers discrete tasks via UI pages, one action at a time. AI agents operate differently; they see Workday as a set of tools to achieve an end goal. Rather than thinking in clicks, users state the goal and the agent orchestrates data pulls, comparisons, and updates while preserving security and governance.

Two concrete illustrations stood out. In compensation review, instead of editing cells one by one, managers can ask an agent to model "pay for performance," allocate bonus budget by rules, run what-ifs, and even apply rounding consistently. In benefits, an agent can recommend a medical plan by combining general knowledge with tenant context, like dependents, current plan costs, and plan details, then let the user confirm the selection. The throughline, richer contextual data turns a generic answer into an actionable one. The speaker closed with three assignments: rethink what is possible, arrive with goals not clicks, and become your organization's data cheerleader.

Illuminating Total Rewards with AI

HCM

Key Announcements & Takeaways

- Shift the mental model
  - Treat agents as contractors that deliver outcomes; state goals such as "allocate bonus budget fairly" or "check pay equity," not step-by-step tasks.
  - Use agents to compare suborganizations, run what-ifs, and apply rules in one flow instead of exporting to spreadsheets.
- Keep governance intact
  - Agent actions respect Workday security, audit, and approvals; users only get results they are authorized to see and do.
- Context drives quality
  - AI becomes useful when grounded in your tenant data, for example plan details, costs, dependents, knowledge articles, compensation philosophies, and policy docs.
  - Better context turns a generic suggestion into a specific, defensible recommendation.
- Practical moves to start now
  - Expand benefits plan details and descriptions; enrich knowledge articles in Workday Help.
  - Centralize supporting documents, compensation philosophies, and program explainers where agents can reach them.
  - Identify repetitive comp-review actions to hand to agents, like budget distribution and rounding rules.
- Impact to target
  - Reduce manual cell edits and spreadsheet time during compensation cycles.
  - Shorten decision cycles for benefits and compensation, with clearer audit trails and fewer back-and-forths.
- Mindset homework
  - Rethink what is possible with AI; arrive in Workday with goals, not clicks; champion data quality so agents can deliver high-value outcomes.

Insights in the Flow of Work: Exploring the Power of Prism Analytics

HCM

Speakers
Aravind Chandrasekaran (Workday)

Why This Session Matters
HR and Finance leaders are asked to lead with data, yet key information sits in many systems with heavy IT dependence and disconnected actions. This session shows how Workday Prism blends external data with Workday, keeps security intact, and delivers insights where people already work. If you need faster answers on headcount, cost, or pipeline health, this is directly useful.

What Was Covered
The speaker set the context with Workday's analytics landscape, core reporting, People Analytics, Prism Analytics, Adaptive Planning, Employee Voice, and Extend. The focus was Prism as the data hub that ingests external sources, applies Workday security end to end, and delivers insights in dashboards, discovery boards, reports, business processes, and even Extend apps. Real customer outcomes were highlighted, Memorial Sloan's expected 30 million dollars savings over five years by analyzing missed meals, overtime, and vacation liability, and Huntington's semiannual process cut from 60 hours to under two hours.

A live-style demo built a Total Cost of Labor discovery board by ingesting stock plan data from AWS S3, joining it to Workday base pay and benefits, applying Workday security, publishing, and visualizing—all in minutes. The talk emphasized that Prism complements your warehouse and BI stack, common connectors include Snowflake and Salesforce, and that scale is proven with over 2,000 customers, more than one million monthly users, and over 200 trillion rows processed monthly. The session closed with how to try it hands on (Express Labs or a virtual test drive) and a community group for best practices.

Insights in the Flow of Work: Exploring the Power of Prism Analytics

HCM

Key Announcements & Takeaways

- Why Prism
  - Blend any external data with Workday data, then apply consistent Workday security from ingest to distribution.
  - Put insights in the flow of work, discovery boards, dashboards, reports, business processes, and Extend apps.
- Proven scale and coexistence
  - 2,000+ customers, 1M+ monthly users, and 200T+ rows processed monthly; complements Snowflake, Power BI, and Tableau,
- Repeatable, high-value use cases
  - Total workforce visibility, for example M&A consolidation of non-Workday populations into one model.
  - Compensation and total rewards in worker profiles by joining payroll, stock, and benefits.
  - Time tracking with badging data, recruiting pipeline analytics, learning history, and sentiment joins.
- Demo pattern you can reuse
  - Use Data Catalog to connect to S3, load files into Prism tables, join to Workday datasets on worker IDs, apply security domains, publish, and build visuals.
  - One dataset serves many surfaces; you can duplicate visuals and switch chart types without rebuilding data.
- Governance and speed
  - Security is consistent with Workday's model, no separate policy engine to learn for consumers.
  - Streamlined experience reduces IT ticket cycles; business authors can publish and iterate quickly.
- Measurable outcomes
  - Memorial Sloan targets 30M dollars in savings over five years; Huntington cut a 60-hour process to less than two hours.
- How to get started
  - Try the step-by-step lab or virtual test drive to build the cost-of-labor board.
  - Join the Prism community to copy patterns and accelerate adoption across HR and Finance.

Leveraging the Power of Journeys and Peakon Employee Voice

HCM

Speakers

Rex Blodgett (Workday)

Why This Session Matters

Employee engagement is falling while high performers are leaving, often after months of declining sentiment. This session shows how Workday Peakon Employee Voice and Workday Journeys turn listening into manager action that retains talent. HR and people leaders will find practical practices that raise engagement, strengthen manager capability, and improve growth outcomes.

What Was Covered

The session opened with the engagement reality, US engagement at a 10-year low and similar global trends, with internal mobility and promotions down. Analysis at Workday shows managers account for about a quarter of a team's engagement score, and high performers typically show a nine-month decline in sentiment before exiting. The remedy centers on enabling managers with the right tools and rituals.

Workday invests in two tracks. First, manager capability via a standardized new-manager Journey, Embark, delivered over six months to every people leader, and ongoing Leader Labs that build core skills. Second, systematic listening and action with Peakon. Best practices emphasize confidentiality, visible action on scores, and timely responses to comments. Features highlighted include Team Suggestions to crowdsource fixes on chosen focus areas and AI comment summarization to find themes at scale. A case example after a company restructuring showed a surge in manager interactions, followed by engagement rebounding to within 1 percent of pre-event levels in a few months. A deeper retention study identified effective, lightweight check-ins and clear goals as the two biggest drivers of growth sentiment; standardizing these raised goal-setting adoption from 12 percent to 89 percent and regular heck-ins from 74 percent to 94 percent, while reducing dissatisfaction with growth by 35 percent.

Leveraging the Power of Journeys and Peakon Employee Voice

HCM

Key Announcements & Takeaways

- Manager impact is material
  - About 23 percent of a team's engagement is attributable to the manager; enablement here moves company scores.
  - High performers often decline over nine months before leaving, which creates a real intervention window.
- Build manager capability deliberately
  - Use a new-manager Journey to deliver culture, performance, compensation, AI strategy, and analytics tools in a consistent six-month path.
  - Offer Leader Labs for all managers to practice feedback, coaching, and action planning.
- Turn listening into action with Peakon
  - Protect confidentiality, set and communicate focus areas, and acknowledge comments to build trust.
  - Use Team Suggestions to ask the team for targeted ideas on a chosen driver; apply AI summaries to detect themes fast.
  - Track manager interactions in Peakon; higher acknowledgment and conversations correlate with higher engagement.
- Focus on two high-leverage rituals
  - Short, frequent check-ins with clear expectations and progress reviews.
  - Simple, system-tracked goals tied to growth and compensation conversations.
- Proven outcomes you can aim for
  - Engagement recovery to near pre-disruption levels when managers actively acknowledge and respond.
  - Goal-setting adoption lifted from 12 percent to 89 percent and regular check-ins from 74 percent to 94 percent after standardization.
  - A 35 percent drop in employees dissatisfied with growth and career path following these changes.

Leveraging the Power of Journeys and Peakon Employee Voice

- Practical next steps
  - Standardize a new-manager Journey and Leader Labs; make Peakon best practices part of manager onboarding.
  - Require every manager to set one Peakon focus area per quarter and use Team Suggestions.
  - Mandate lightweight monthly check-ins and simple, living goals; report adoption to senior leaders.
  - Use AI summarization to triage comments for at-risk groups and act before the nine-month decline becomes attrition.

Exploring Workday VNDLY Global Capabilities

HCM

Speakers
Tylan Matthiesen (Workday)

Why This Session Matters
Global contingent programs are complex, different laws, currencies, taxes, and languages, plus fast-changing local rules. This session shows how Workday VNDLY handles that complexity with self-service configuration, transparent rate calculations, and improved timekeeping. It is useful for HR, procurement, and PMO leaders expanding contingent hiring across countries.

What Was Covered
The session introduced VNDLY's role as Workday's vendor management system for the external workforce, alongside HCM for employees. Three modules anchor the platform, Extended Workforce Management for time, expenses, invoicing, and budget control; Statement of Work for project-based engagements and milestone payments; and Worker Profile Management for headcount visibility when you are not ready for full VMS processes. Global scale points included workers in 130+ countries, 35+ language packs, 130+ currencies with base-currency rollups, 50+ local tax schemes, and data centers in the US, UK, and Germany.

Three focus areas were demonstrated. First, rate management with a new calculation engine built on formulas and formula groups, giving a line-by-line breakdown of how bill rates are derived and letting admins update components like UK pension percentages safely. Second, flexible configuration through rules-based settings and custom fields, apply policies by country, module, job template, or job category. A tenure policy example showed alerts, violation handling, and automatic assignment of the right policy when onboarding a worker in the Netherlands. Third, global management improvements in timekeeping, monthly time support and a new unit-based time entry type, with approvals showing full rate math so reviewers understand client amounts before sign-off. The guiding idea, to go global you need to go local, and VNDLY's self-service controls are designed to do that without support tickets.

Key Announcements & Takeaways

- What VNDLY covers
  - Three modules, Extended Workforce Management, Statement of Work, and Worker Profile Management give end-to-end control from request to invoice.
  - Works with Workday HCM so leaders see employees and contingent workers in one ecosystem.
- Global readiness built in
  - 130+ countries supported, 35+ language packs, and 130+ currencies with base-currency conversions for rollups.
  - 50+ local tax schemes for services and VAT-style taxes; configurable to match local requirements.
  - Data residency today in the US, UK, and Germany; additional regions planned.
- Transparent rate management
  - Calculation engine with reusable formulas and groups; see exactly how client amounts are computed.
  - Quick updates to components like pension percentages flow into future invoices automatically.
- Rules-based governance at scale
  - Self-service settings applied by geography, module, job template, or job category, no ticket needed.
  - Tenure policies with proactive alerts and scheduled violation handling prevent compliance issues.
- Timekeeping advances
  - Improved monthly time and new unit-based time entry for geographies or roles where hours or days are not a fit.
  - Approval views include the calculation breakdown to speed reviews and reduce disputes.
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Exploring Workday VNDLY Global Capabilities

- Practical steps to act now
  - Map your countries to rules-based policies for tenure, rate components, and tax schemes; enable alerts.
  - Standardize formula groups for rate calculations and document who can change what.
  - Adopt unit-based time where it matches local practice; train reviewers to use the rate breakdown.
- Near-term roadmap
  - Continued enhancements to monthly timesheets and wider rollout of unit-based time.
  - Expanded security for multi-MSP operating models so one tenant supports multiple providers with strict partitioning.
  - Additional data-center regions under evaluation to meet local hosting requirements.

Manager Insights Hub: Elevating the Manager Experience

HCM

Speakers

Cindy Pham-Davis (Workday)

Why This Session Matters

Managers juggle time approvals, budgets, performance, onboarding, and contingent worker tasks across tools. Manager Insights Hub brings these into one place with AI-driven insights and quick actions, so teams save time and reduce errors. HR, HRIS, and people leaders will see how to give managers a clear, governed workspace that scales.

What Was Covered

Manager Insights Hub is positioned as a one-stop shop for managers. It aggregates content from across Workday and connected systems, surfaces timely insights, and lets managers act without jumping between apps. A live walkthrough followed "Theresa," a sales manager who approved time for employees and contingent workers, reviewed pay alignment and budgets, extended a contractor's work order, and prepared for annual reviews, all inside the hub.

The session showed two core angles. First, day-to-day execution, including new Time and Scheduling navigation, a Contingent Worker team view with real-time VNDLY access, budget and comp analysis links, and AI-generated Talent Highlights that compile strengths, opportunities, and sources for performance conversations. Second, admin control via the Maintain Hubs configuration, rename the hub, reorder sections, add Quick Actions for tasks or reports, customize navigation groups, and manage suggested links. The roadmap adds onboarding visibility cards, career paths shared to managers, hub cards from Extend apps, and incorporation of manager-focused AI agents. Baseline Hub is available to HCM core; additional SKUs light up more content.

Manager Insights Hub: Elevating the Manager Experience

HCM

Key Announcements & Takeaways

- One place for manager work
  - Consolidated overview with insights like check-in status and missed meals; quick access to approvals and reports.
  - Time approvals for employees in Workday and contingent workers via an embedded, real-time path to VNDLY.
- Budget and pay decisions faster
  - Direct links to compensation benchmarks and pay range analysis to spot misalignment ahead of reviews.
  - Side-by-side visibility to contingent work orders, end dates, budget remaining, and tenure compliance, with a jump to update in VNDLY.
- AI assistance that is explainable
  - Talent Highlights drafts 5 strengths and 5 opportunities with cited sources from reviews, goals, skills, and feedback.
  - Managers can edit the draft, then publish to the worker profile for review preparation.
- Admin configuration without projects
  - Maintain Hubs lets admins rename the hub, move cards, and promote awaiting actions to the top.
  - Create Quick Actions to launch tasks, reports, dashboards, external links, or Extend apps.
  - Customize navigation labels and order
- Roadmap and availability
  - 25R2 delivery for the showcased Hub experience; upcoming enhancements include onboarding status cards, manager view of employee career paths, Extend-built cards, and placement of manager-oriented AI agents inside the hub.
- Practical next steps
  - Enable Manager Insights Hub for HCM core and add Quick Actions for top manager tasks.
  - Train managers to use Time and Scheduling, the Contingent Worker view, and Talent Highlights for review prep.
  - Use Maintain Hubs to align the layout to your seasons, for example hiring or performance cycles.

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Maximize Core HCM Efficiency: Actionable Tips and Hidden Gems

HCM

Speakers

Shannon Clark (Workday)

Why This Session Matters

Core HCM processes touch every hire, move, and pay decision. Small errors and extra clicks scale into downstream rework for payroll, benefits, and HR support. This session delivers turn-on-now configuration patterns that cut mistakes, speed staffing, and automate routine steps so HR teams can focus on higher-value work.

What Was Covered

The session organized efficiency into three levels, make it easier by preventing errors, make it faster by streamlining steps, and make it a breeze by automating work end to end. Practical examples showed how to default values smartly in Change Job and Hire, keep FTE and time type in sync, bring collective agreement data forward from requisition through staffing, and auto-complete service date tasks.

Automation patterns focused on removing manual handoffs between Recruiting and HCM by carrying fields forward and filling gaps with configurable defaults so staffing business processes can auto-complete. For ongoing operations, scheduled collective agreement reviews and mass end-of-contract actions reduce "date tracking" spreadsheets. The session closed with concrete success metrics, fewer HR tickets, higher task completion, fewer clicks, and more steps fully automated.

Key Announcements & Takeaways

- Improve data quality at the source
  - Configurable Change Job defaulting, set dynamic rules to default key fields like time type, job title, work shift, and business title.
  - Working Time Rules by country, default scheduled and default weekly hours so FTE calculates correctly without manual fixes.

- Service Dates defaulting, define rules once, then optionally auto-complete the service date step to avoid inbox churn.
- Streamline high-traffic flows
  - Collective Agreement on Job Requisition, capture it during req creation (and in the consolidated template) so compensation and downstream staffing default correctly.
  - Consolidated Hire, combine common substeps such as organization assignments, collective agreements, pay group, and government IDs into one guided initiation.
- Automate routine work
  - From Recruiting to Staffing auto-complete, carry matching fields from recruiting into hire/change job/additional job; use Maintain Staffing Fields Defaults to fill the rest, then enable auto-complete on the staffing BP.
  - Scheduled Collective Agreement Reviews, let Workday trigger the review task on the right date with the right security group, configurable by country.
  - Mass end of contingent contracts, use the mass operations framework to end contracts automatically when contract end dates are reached.
- Implementation notes that save time
  - Prefer defaults before validations, reduce stops and HR tickets by defaulting the correct value rather than blocking the user.
  - Secure collective agreement tasks with the Offer and Employment Agreement, Collective Agreement domain; add the subprocess to relevant BPs.
  - Pair Working Time Rules with Change Job defaulting so hours, time type, and FTE stay aligned without manual review.
- How to measure success
  - Track reduced HR support cases tied to staffing and service date errors.
  - Monitor higher on-time task completion and fewer clicks in consolidated flows.
  - Count auto-completed staffing transactions and scheduled actions executed without intervention.

Onboarding Plans: A Guide to Configuration and Best Practices

HCM

Speakers

Luka Hunter (Workday)

Why This Session Matters

Onboarding shapes first impressions, time to productivity, and early retention. Workday's new Onboarding Plans give HR a faster way to deliver compliant, engaging experiences without rebuilding core business processes. Teams can start small, ship quickly, and iterate while keeping governance intact.

What Was Covered

Workday relaunched onboarding in 25R1 with a new UI and a plan model organized into stages. Stages limit overload and help teams deliver the four C's of onboarding, compliance, clarification, culture, and connections. You can create many plans, each with up to 10 stages, though five or fewer is recommended for clarity. Customers live on the new experience report faster completion of key tasks, about 30 percent overall and 27 percent for benefit elections.

25R2 expands value with optional sections you can toggle on based on SKUs. Required Learning surfaces mandatory courses in one place. Connect with a Coworker uses machine learning to suggest peer connections by role, skills, location, and tenure. Journeys embed curated guidance for complex topics inside the plan. Bulletins return as flexible content containers, with copy tasks that move existing bulletin and announcement content from the old dashboard into plans. Internal pre-boarding is available to all HCM customers today; external pre-boarding is available with Recruiting.

Key Announcements & Takeaways

- Design the plan well
    - Keep stages focused and distinct; aim for three to five.
    - Use stages to avoid overwhelming new hires and to deliver the right content at the right time.

Onboarding Plans: A Guide to Configuration and Best Practices

HCM

- Ship fast, then improve
  - Start with one audience and one plan (for example day 1, week 1, month 2+).
  - Send a single welcome email using Notification Designer; add a homepage card for easy access.
  - Do not rebuild your onboarding business process to go live; plan tasks appear automatically in a To-Do section and persist across stages.
- Turn on value with simple toggles
  - Required Learning, Connect with a Coworker, and Journeys sections can be enabled quickly; personalize plans by audience.
  - Use Bulletins for links, reports, and messages; copy existing items into plans to avoid rework.
- Internal and external pre-boarding
  - Internal pre-boarding works for every HCM tenant once credentials are issued before day one.
  - External pre-boarding bridges offer to start date for Recruiting customers to cut no-shows.
- Configuration effort tips
  - Most items are low effort; medium effort comes from audience rules and conditions.
  - Day One cards can use calculated fields; a contributed solution is available if you need help.
- Quality and governance checks
  - Use Examine for Issues (25R2) to spot common setup gaps, modify access on self-service onboarding domains, missing audience assignments, and plan advisories.
  - Use Test Membership to validate audience logic before rollout.
  - Use "Content available until the end of" to persist critical content across later stages.
- Results to target
  - Faster completion of high-value tasks, including benefits.

    - Lower no-shows and quicker time to productivity through pre-boarding and clearer guidance.
- Practical next steps
    - Pick one population, launch in days with internal pre-boarding, a few stages, and required content.
    - Toggle sections that match your SKUs; embed Journeys for complex topics.
    - Iterate on audiences and conditions after go-live rather than delaying for perfection.

Tailored Experiences with Workday Extend and Workday Journeys

HCM

Speakers

Marian Klander (Workday)

Why This Session Matters

Employees juggle many systems and need clear guidance to get work done. Structured, timely support increases satisfaction and engagement, and it drives adoption of the tools you already own. This session explains how Workday Extend and Workday Journeys work together to deliver tailored, in-Workday experiences that reduce friction and raise productivity.

What Was Covered

The session showed how Extend and Journeys combine to move from fragmented tasks to orchestrated, personalized flows. Extend lets you build native apps that look and behave like Workday, capture new data, call third-party APIs, and run on any device. Journeys provides guided experiences across moments that matter, from enrollment and leave to change management and tool rollouts, with steps that link to Workday tasks, Extend tasks, learning, documents, external links, and to-dos.

A major highlight is the new Extend Card step type in Journeys (simple card or list). Cards surface external or Extend data and actions directly inside a Journey, the homepage, delivered hubs, search, and mobile, keeping users in Workday. Examples included a remote work app that shows remaining remote days and requests, a recognition app that embeds “create recognition” actions plus a dynamic list of past kudos, office badging, and charitable giving. Admins can add due dates and conditions to target the right audience, for example managers only. A new public API distributes Journeys from anywhere, including third-party workflows, to employees or managers, which scales adoption without manual work.

Tailored Experiences with Workday Extend and Workday Journeys

HCM

Key Announcements & Takeaways

- Extend + Journeys, better together
    - Build native apps with Extend; guide users to the right step at the right time with Journeys.
    - Use step types for Workday tasks (including Extend tasks), external links, learning, documents/help, videos, and to-dos.
- New in 25R2, Extend Cards inside Journeys
    - Add simple or list cards as Journey steps to display data and launch actions without leaving Workday.
    - Cards also surface on Home, Hubs, Search, and mobile; personalize by persona with conditions and due dates.
- Orchestrated, data-driven experiences
    - Examples, recognition, remote work, office badging, charitable donations.
    - Dynamic cards update in real time, for example newly received recognition appears automatically.
- Distribution at scale
    - Public API distributes Journeys programmatically from Workday or third-party tools.
    - Support manager-targeted Journeys as well as employee Journeys.
- Why it matters for adoption
    - Fewer context switches, higher completion, and consistent governance by keeping actions in Workday.
    - Structured guidance correlates with materially higher satisfaction and engagement.
- Practical next steps
    - Identify one Extend app with low adoption; wrap it in a Journey with cards, due dates, and conditions.
    - Place key cards on the homepage and relevant hubs; enable mobile.
    - Use the distribution API to trigger Journeys from real events, for example new office access or program launches.

Payroll Tips & Tricks: Unlock the Power of AI

HCM

Speakers

Ryan Claxton (Workday)

Why This Session Matters

Payroll teams are asked to do more with less, while accuracy and compliance expectations keep rising. This session explains practical AI features already in Workday Payroll that cut manual effort, catch errors earlier, and speed reviews. It is useful for payroll leaders, HRIS, and operations teams who want quick wins without a big project.

What Was Covered

The speaker demystified AI for payroll, framing agentic AI as a "brain" plus "tools," and distinguishing ambient agents (work in the background) from delegate agents (execute tasks on request). He mapped AI capabilities to five tool types, create, find, understand, recommend, and detect.

The core focus was on three live capabilities. Payroll Prompt Recommendations uses "recommend" to surface the right tasks across common payroll actions, reducing clicks and time-on-task. Payroll Anomalies uses "detect" to flag irregular in-progress results and learns from user feedback, helping teams fix issues before settlement. Data Entry Check for Payroll Input provides real-time warnings when a manual input is outside historical norms for that pay component and PCRC, preventing fat-finger mistakes like an extra zero on a bonus. Tips covered enablement, data thresholds, and configuration choices to get immediate value.

Key Announcements & Takeaways

- AI, made usable for payroll
  - Think in two agent types, ambient (background monitoring) and delegate (on-demand execution).
  - Five core AI tools power features you can use today, create, find, understand, recommend, detect.

Payroll Tips & Tricks: Unlock the Power of AI

HCM

- Payroll Prompt Recommendations (time saver)
  - Surfaces up to five tailored prompts on tasks like Manual Payments, On-Demand Payments, Pay Calculations, Payroll Inputs, Tax Filings, and more.
  - Opt into the Innovation Service, then it is on; disable specific tasks if needed. Improves with use and respects security by hiding invalid prompts.
  - Expect measurable efficiency, about 11 percent average time reduction across enabled tasks.
- Payroll Anomalies (prevent bad results)
  - One report to review in-progress results, mark items as anomalous or not, and train the model.
  - Practical tips, use facets to focus on high-risk populations (for example executives), back-tag historical results to accelerate learning, switch to table view for familiar analysis and export.
  - Fix issues directly from the report to avoid post-settlement rework.
- Data Entry Check for Payroll Input (catch fat-finger errors)
  - Real-time warning when an entered amount is outside the 5th–95th percentile for that pay component/PCRC.
  - Needs at least 100 historical inputs per pay component/PCRC; data refreshes weekly.
  - Works for manual payments and payroll inputs, including web services on submit (not validation mode); not designed for Worksheets or generic APIs.
  - It is a warning, not a hard stop; pair with Custom Validations on Payroll Inputs when you need hard limits.
- Adoption pointers
  - Opt into the Innovation Service first so models can learn from your tenant's data.
  - Start with prompts and data-entry checks for immediate productivity and error reduction; add Payroll Anomalies to shift review time earlier in the cycle.
  - Use tenant security and configuration to keep controls and audit intact while scaling AI assistance.

AI-Powered Demand Forecasting for Optimized Schedules and Workers

HCM

Speakers
Richard Salgado (Workday)

Why This Session Matters
Accurate schedules protect sales and labor budgets. Understaff, you lose customers; overstaff, you waste wages. This session shows how Workday's AI-powered demand forecasting and optimized scheduling reduce guesswork, improve forecast accuracy, and generate compliant schedules that respect costs and worker preferences.

What Was Covered
The session walked through the end-to-end flow from forecast to published schedule. Workday trains forecasting models on three to five years of your data, then predicts demand four to eight weeks ahead. Forecasts account for holidays, events, operating hours, and fixed activities like opening and closing. Managers can adjust forecasts for known anomalies, for example promotions or product launches, and compare predicted versus actuals to improve future accuracy.

Forecasts convert to labor demand using your labor standards, the blueprint that translates volume signals (sales, transactions, meals, repairs) into required roles and minutes of work. The scheduling engine then assigns shifts by evaluating hard constraints (qualification, availability) and soft constraints (schedule consistency, preferences, fairness, cost). Managers can lock budgets, choose overtime rules, and tune optimization priorities. Schedules are scored, edited in draft, and published through a governed approval process when needed.

Key Announcements & Takeaways

- AI forecasting you can trust
    - Uses your historical data, supports 15, 30, or 60-minute granularity, and factors in holidays, events, operating hours, and fixed activities.

AI-Powered Demand Forecasting for Optimized Schedules and Workers

HCM

    - Human-in-the-loop adjustments allow targeted increases or decreases by day and time to reflect local realities.
    - Early adopters reported forecast accuracy up to 90 percent and measurable sales protection.
- From demand to schedule, no spreadsheets
    - Labor standards translate "200 sales per hour" into the right mix of roles and minutes per task.
    - The engine creates schedules and assignments simultaneously, reducing overtime spikes and undesirable shifts created by "fill empty boxes" approaches.
    - Soft constraints are configurable, consistency and preferences improve show rates and retention; cost minimization protects margins.
- Governance and controls built in
    - Lock budgets by hours or currency; define whether the engine can exceed weekly hours or use overtime.
    - Use Workday business processes for approval, for example auto-route over-budget schedules to area managers.
- Results you can model to
    - Hy-Vee cut manager schedule-build time by 50 percent.
    - Valvoline reduced per-location schedule creation from two to four hours down to about 15 minutes.
- What is live vs coming
    - Optimized scheduling and labor-demand generation are available today; the new AI forecasting module is rolling out with customer adopters.
    - Roadmap adds weather and daylight signals to forecasting, plus quick reforecasting just before publishing.
- Practical first steps
    - Load three to five years of clean history; define or refresh labor standards; set budget and overtime policies.
    - Lock key optimization settings at the org level; let managers tune only what you intend.
    - Start with one department, validate forecast-to-actuals weekly, then expand across locations.

Workday Help and Self-Service Agent HR's Dynamic Duo

HCM

Speakers
Tiffany Buckner (Workday)

Why This Session Matters
HR teams spend too much time answering repeat questions and chasing simple tasks. Employees expect instant answers and self-service, not slow intranets and email threads. This session shows how Workday Help and the Self-Service Agent work together to deflect common inquiries, automate routine actions, and keep governance intact.

What Was Covered
The speaker positioned Workday Help as the foundation for modern HR service delivery, a single source of truth with knowledge, case management, and analytics. The new Self-Service Agent adds conversational AI that understands questions, pulls the right policy, and can execute tasks for the user with human confirmation. Together, they create one intelligent ecosystem inside Workday that reduces effort for employees and HR.

A live demo walked through two scenarios. In an expense report, the agent answered “When do I need a receipt?” by citing policy, then explained the lost-receipt process without leaving the task. In a parental leave scenario, the agent answered policy questions, combined content from multiple help articles, and guided the employee to request time off for a medical appointment, prefilling choices and submitting after user confirmation. The agent draws knowledge from Workday core context (user, page, fields), Workday Help articles, and external sources like SharePoint, Box, or Google Drive. Early adopters report faster answers and fewer repetitive tickets.

Workday Help and Self-Service Agent HR's Dynamic Duo

HCM

Key Announcements & Takeaways

- Build the foundation with Workday Help
  - Centralize HR knowledge, use case management for exceptions, and apply analytics to find improvement opportunities.
- Add the Self-Service Agent for impact
  - Conversational Q&A with sources shown; handles tasks like time off requests directly in chat with a final confirm step.
  - Works in context (task side panel) and from the global header; keeps employees in the flow of work.
- Rich, governed knowledge
  - Three inputs, Workday core context, your Help articles, and optional external connectors (SharePoint, Box, Google Drive).
  - Security and audit are respected; users see only what they are allowed to see and do.
- Practical examples to copy
  - Expenses, surface receipt thresholds and lost-receipt steps while the report is open.
  - Leave, answer policy, link to enrollment actions, and submit time off with prefilled details.
- Measurable benefits
  - Employee experience improves via instant, accurate answers; HR case volume drops as routine questions deflect.
  - HR shifts time to strategic work while employees complete tasks faster with fewer handoffs.
- Adoption tips
  - Keep Help articles current and clear; the agent's quality depends on your content.
  - Enable external connectors if knowledge lives outside Workday; consolidate over time.
  - Promote in-task chat usage so users ask in the moment rather than opening tickets.
- Proof points
  - Early adopters like Ochsner, Thomson Reuters, and Epic report faster access to information and less manual, repetitive work.

Workforce Planning Unplugged: Roadmap and Latest Innovations

HCM

Speakers

Toni Villamil (Workday)

Why This Session Matters

Workforce planning is moving from static headcount spreadsheets to connected, AI-assisted planning in Workday. This session shows what is live now and what is coming next, so HR and Finance leaders can align plans, cut reconciliation effort, and make faster decisions. It is most relevant for organizations using Adaptive Planning with Workday HCM, or those considering tighter HR-Finance planning.

What Was Covered

The roadmap is driven by three themes, agility, experience, and insight. Short-term priorities focus on end-to-end headcount planning that extends beyond Workday, AI-enhanced user experience, and continued resiliency and security of the service. Near-term innovations include headcount planning by cost center or custom organizations, in-plan refresh of actuals with auditability, and collaboration upgrades that bring comments, user tagging, and Slack notifications into Adaptive dashboards, with Microsoft Teams support to follow.

AI is being embedded through a new Planning Agent. Initial skills include Advanced Variance Analysis, which flags and explains variances with adjustable thresholds, and Data Analysis, which summarizes reports and generates charts on demand. Ask Workday acts as the orchestrator, routing user questions to the right skill based on context. Looking ahead, Workday is building an Org Design and Scenario Modeling module that runs in core Workday and integrates with workforce planning data, and a vision for skill-based strategic workforce planning that links business strategy to work, required skills, supply, learning, and plans in one flow.

Workforce Planning Unplugged: Roadmap and Latest Innovations

HCM

Key Announcements & Takeaways

- Plan by more than supervisory org
  - Headcount planning can now target cost centers and custom orgs. Finance can set targets and partner effectively without re-mapping structures.
- Refresh actuals during planning
  - Hydrate plans with the latest actuals mid-cycle, keep user plan edits intact, and compare original versus refreshed data with a clear audit trail. Less reconciliation later.
- Built-in collaboration
  - Commenting and @mentions on dashboards, plus Slack notifications today and Teams next. Conversations are tied to data points, not scattered files.
- Planning Agent, first skills
  - Advanced Variance Analysis highlights variances in reports, explains drivers, and supports natural-language queries.
  - Data Analysis finds relevant data, summarizes, and creates charts on request.
  - Ask Workday orchestrates which skill to call, based on where the user is working.
- Roadmap, Org Design and Scenario Modeling
  - Model multiple organizational scenarios in core Workday, assess impacts, then execute when ready. This is distinct from Org Studio and requires the workforce planning SKU, but not a full implementation to start modeling.
- Vision, skill-based strategic workforce planning
  - Start from business initiatives, derive work and required skills with AI, match to current workforce supply, and connect to Learning and Adaptive to close gaps, all on one platform.
- Ongoing priorities
  - End-to-end headcount planning, expanded integrations beyond Workday, AI-driven UX differentiation, and platform resiliency and security remain focus areas.

Workforce Planning Unplugged: Roadmap and Latest Innovations

HCM

Key Announcements & Takeaways

- Plan by more than supervisory org
  - Headcount planning can now target cost centers and custom orgs. Finance can set targets and partner effectively without re-mapping structures.
- Refresh actuals during planning
  - Hydrate plans with the latest actuals mid-cycle, keep user plan edits intact, and compare original versus refreshed data with a clear audit trail. Less reconciliation later.
- Built-in collaboration
  - Commenting and @mentions on dashboards, plus Slack notifications today and Teams next. Conversations are tied to data points, not scattered files.
- Planning Agent, first skills
  - Advanced Variance Analysis highlights variances in reports, explains drivers, and supports natural-language queries.
  - Data Analysis finds relevant data, summarizes, and creates charts on request.
  - Ask Workday orchestrates which skill to call, based on where the user is working.
- Roadmap, Org Design and Scenario Modeling
  - Model multiple organizational scenarios in core Workday, assess impacts, then execute when ready. This is distinct from Org Studio and requires the workforce planning SKU, but not a full implementation to start modeling.
- Vision, skill-based strategic workforce planning
  - Start from business initiatives, derive work and required skills with AI, match to current workforce supply, and connect to Learning and Adaptive to close gaps, all on one platform.
- Ongoing priorities
  - End-to-end headcount planning, expanded integrations beyond Workday, AI-driven UX differentiation, and platform resiliency and security remain focus areas.

Advanced Reporting and Analytics with Workday Adaptive Planning

HCM

Finance

Speakers

Alice Coyne (Workday)

Why This Session Matters

Teams lose time stitching numbers across tools and chasing reviewers for context. This session shows practical ways to speed up reporting, add collaboration where people work, and use AI for analysis. It is most useful for FP&A, HR, and HRIS teams that want faster insight to action without leaving Adaptive or their spreadsheet tools.

What Was Covered

Focus areas were dashboards, reporting, and Office/Google integrations. Dashboards now act as a working canvas, not just a display. Users can comment directly on a data point, tag colleagues, and jump into the exact filter context from notifications. Slack alerts are live, with Microsoft Teams next.

Reporting best practices covered scheduling and bursting using the Z-axis to parameterize recipients, plus embedded Ask Workday for contextual help. For spreadsheets, Office Connect tips included View By to pivot on a new analysis tab without breaking formatted reports, and Write Back to submit plan edits from Excel and refresh KPIs immediately. A Google Sheets add-on, in early access, mirrors matrix reports, supports drag and drop layout, includes assistant actions to summarize and chart, and can export results to Slides or PowerPoint. Office Connect for Mac is in early access and targeted for 26R1.

Key Announcements & Takeaways

- Collaboration in dashboards
    - Inline comments and @mentions on specific data intersections.
    - Notifications in product and email, plus Slack alerts; click through opens the dashboard at the exact context with filters pre-applied.
    - Microsoft Teams notifications are planned next.

Advanced Reporting and Analytics with Workday Adaptive Planning

HCM

Finance

- Report scheduling and bursting you can use today
  - Use the Z-axis to burst by parameter and deliver recipient-specific tabs that respect access.
  - Schedule heavier jobs for early morning so users open ready reports at start of day.
- Ask Workday embedded help
  - Contextual help pane answers "how to" questions inside reporting pages.
  - Reduces ad hoc support load for infrequent users.
- Office Connect, analysis without breaking formatting
  - View By creates a linked analysis tab for deeper pivots while keeping the polished report intact.
  - Write Back lets power users submit plan edits from Excel and immediately refresh downstream metrics.
  - Office Connect for Mac is in early access, targeted for 26R1.
- Google Sheets early adopter add-on
  - Build matrix-style reports with row and column filters, drag and drop layout.
  - Use assistant actions to summarize or visualize, then export charts and context to Slides or PowerPoint.
- Planning Agent context
  - Agent skills demoed alongside the assistant to speed analysis tasks, aligned to upcoming releases.
- Bottom line for customers
  - Bring conversation to the number, not to email.
  - Use bursting for scale, View By and Write Back for speed, and embedded help to cut training.
  - Pilot the Google add-on and prepare for Office Connect on Mac in 26R1.

Advanced Scenario Modeling

Finance

Speakers
Jacob Susskind (Workday)

Why This Session Matters
Leaders ask for fast what-ifs, but many teams still copy versions or use offline files. Scenarios let non-modelers explore options safely, collaborate, and then merge only the approved changes. This is useful for FP&A and HR planning teams that want speed, control, and a clear audit trail.

What Was Covered
Scenarios were positioned as lightweight, live copies of a version. They track edits, highlight changes, allow downloads of deltas, and support a controlled merge back to the base version. Two types exist, personal for an individual sandbox, and shared for multi-user collaboration with simple workflow actions like submit, approve, send back, and discard changes.

A demo walked through an East Coast expansion. The FP&A director created a scenario from the working budget, added two New York sales hires for March 2026, and saw instant impact on dashboards that compare scenario to base. The scenario was shared with the revenue analyst group through a deep link that opened the right dashboard and perspective. The analyst entered price and ramped quantity over time, saved, and submitted for review. The owner inspected an Excel download of changes, reviewed P&L impact, approved submissions, then merged. The scenario was deleted on merge, changes flowed into the working version, and a read-only history remained in a Merged folder.

Key Announcements & Takeaways
- Scenarios are GA and ready to use
    - Create a live copy of a version, highlight edits in yellow, compare to base on dashboards, and merge approved changes back.

Advanced Scenario Modeling

Finance

- Personal vs shared scenarios
  - Personal is private to the owner. Shared supports multiple collaborators working in one scenario with submit and approval controls.
- Simple built-in workflow
  - Collaborators submit; owners can approve, send back, discard collaborator changes, or download a change log by sheet.
- Targeted collaboration with deep links
  - When sharing, include the right perspective and dashboard so collaborators land exactly where they should work.
- Clear audit and review
  - Download an Excel of changes that shows base value versus scenario value. Use P&L summaries and waterfalls to validate impact before merging.
- Practical use cases
  - Ad hoc leadership asks (for example shift hires across quarters, pull deals forward). Mini planning cycles with business owners, like best, base, and worst case, then merge the chosen path.
- Guardrails without IT help
  - Non-modelers can explore safely without touching the working version. Owners keep control of what gets merged.
- After merge behavior
  - Scenario is removed from active lists; changes persist in the working version; a read-only record sits in the Merged history for traceability.

Cloud Data Connector and Optimizing Your Data Foundation

Finance

Speakers
Ashu Ravichander (Workday)

Why This Session Matters
Most teams want fast insight without duplicating large datasets or maintaining brittle integrations. This session explains how to connect Adaptive Planning to cloud data warehouses, schedule high-volume loads, and drill through to detailed transactions without storing them in planning. It is useful for FP&A, HR planning, and analytics teams that need scale, governance, and speed.

What Was Covered
The session introduced Cloud Data Connector pipelines as a modern, wizard-based way to import data from cloud data warehouses into Adaptive Planning. Setup takes minutes, then runs on a schedule like other integrations. Key partners and endpoints include Snowflake, Microsoft Fabric, and Incorta. A table template defines the expected schema, so the warehouse team can provision the right tables quickly. Pipelines are one-to-one links to a target sheet and version, and they support both standard and cube sheets.

The highlight was drill through. From any sheet or Cell Explorer, users can right-click a value and open line-level transactions directly from the warehouse. Only aggregated data needs to be loaded into planning, which keeps integrations fast while still giving full context on demand. The demo showed a million-row load completing quickly, then a drill through that returned detailed rows with export to Excel. Ask Workday can summarize the drill-through results, and forward-looking Planning Agent skills will build on the same pattern. Design choices were covered as well, for example staying in managed pipeline mode for high-volume facts, or opting out to auto-create traditional design integrations when transformations are needed.

Cloud Data Connector and Optimizing Your Data Foundation

Finance

Key Announcements & Takeaways

- Cloud Data Connector pipelines
  - Wizard setup in under 15 minutes; schedule like any integration.
  - Connectors for Snowflake, Microsoft Fabric, and Incorta.
  - One pipeline targets one sheet and one version; supports standard and cube sheets.
- Data model pattern (two tables)
  - Data source table, aggregated facts loaded into planning for performance.
  - Drill-through table, detailed transactions kept in the warehouse and queried live.
- Drill through to warehouse detail
  - Right-click a cell or use Cell Explorer to view transactions (first 1,000 displayed, full export to Excel available).
  - Context respects the sheet coordinate, for example time, level, account.
  - Keep planning lean, load only what you need; fetch context on demand.
- Scheduling and operations
  - Pipelines run on the standard task framework; add schedules and manual triggers.
  - Duplicate pipelines to accelerate multi-table setups; download the table template to align schemas.
- Managed pipeline vs classic integrations
  - Managed mode, best for high-volume loads and direct drill through.
  - Opt-out mode, auto-creates design integrations and loaders if you need transforms or metadata handling.
- Governance and access
  - Warehouse credentials expose the catalog allowed by your security model; restrict tables at the source.
  - Clear one-to-one mapping improves auditability and troubleshooting.

Cloud Data Connector and Optimizing Your Data Foundation

Finance

- Performance proof points
  - Demo imported about a million rows in seconds to minutes, then enabled instant drill through.
- Assistant and Planning Agent
  - Ask Workday can summarize drill-through results and generate quick views.
  - Future skills like variance analysis will use the same warehouse-connected pattern.
- Release timing
  - Cloud data imports available since 25R1.
  - Drill through available in 25R2.
- Practical guidance
  - Load aggregates into planning; leave detail in the warehouse.
  - Use pipelines for high-volume facts; use classic integrations only when transforms are required.
  - Start with one high-value subject area, validate drill through with business users, then scale.

Design for Performance and Troubleshooting in Adaptive Planning

Finance

Speakers

Andrew Setness (Workday)

Why This Session Matters

Planning models slow down as more users, sheets, and reports are added. This session explains how to design for speed, reduce user errors, and troubleshoot issues before they hit month end. It is most useful for FP&A and HR planning admins who want reliable performance and cleaner input from decentralized teams.

What Was Covered

The session compared centralized and decentralized planning. The message, move more planning to the business, but add strong guardrails so quality stays high. The speaker walked through concrete design tactics, like validation on model sheets, dimension attributes to simplify formulas and filtering, and automation that fills related fields when a user selects a dimension.

Troubleshooting started with Plan Center to see which sheets and reports are slow or unused. A new diagnostic export was previewed that times account-level evaluations, so admins can find the single formula that is slowing a full report. The session then showed ways to empower planners without creating chaos, using active dashboards as a single workspace, light what-if scenarios that track only deltas, and scheduled report delivery. It closed with practical sheet tips, breakback, copy forward, bulk add for cube intersections, quick charts on selected cells, hotkeys, and reporting options to suppress rollups or optimize load.

Key Announcements & Takeaways

- Move toward decentralized planning, with control
    - Shift ownership to cost center managers and business partners to increase accountability.
    - Keep the model safe with guardrails so finance can trust the inputs.

Design for Performance and Troubleshooting in Adaptive Planning

Finance

- Design for data quality at entry
  - Derived dimensions, auto-fill related attributes when a user selects a value, fewer missed fields.
  - Model sheet data validation, block saves when rules fail (for example salary must be greater than zero).
  - Dimension attributes, create user-friendly groupings, simplify formulas, and filter cube sheets to the right intersections.
- Use Plan Center for targeted fixes
  - Identify slow sheets and long-running reports, prioritize what to optimize first.
  - Clean up clutter by retiring unused reports.
  - New diagnostic export (preview), time each account's calculation on a chosen version, level, and sheet, run A/B tests on formula changes.
- Empower planners without adding friction
  - Active dashboards, one place to enter data, see KPI impact, and read instructions.
  - Scenarios, lightweight what-ifs that track only differences from the base version; share, submit, approve, and merge when ready.
  - Report scheduling, automate monthly packet delivery as static or live links.
- Speed up data entry and analysis
  - Breakback, enter a rollup value and spread it down by method or by an assumption account.
  - Copy forward, push values across periods, add growth by amount or percent with the advanced option.
  - Bulk add cube rows, create many new intersections without navigating deep hierarchies.
  - Chart selected cells, quick visual next to the sheet for ad hoc views.
  - Hotkeys, faster navigation in Cell Explorer and common actions.

Design for Performance and Troubleshooting in Adaptive Planning

Finance

- Reporting for performance and clarity
  - Suppress rollups to reduce noise and improve run time on deep hierarchies.
  - Optimize report load with performance options when users insist on very large layouts.
  - Reusable reports, define once and repeat by level or dimension to deliver focused views.
  - Column notes, show commentary next to the data, not only as footnotes.
- Practical first steps
  - Turn on Plan Center and fix the top three slowest assets first.
  - Add validation and derived dimensions on your busiest input sheets.
  - Pilot scenarios with one business area, then scale.
  - Standardize dimension attributes to stabilize formulas and improve filters.

Expense Reporting Made Easy: Create a Frictionless Submitter Journey

Finance

Speakers

Kristen Jacob (Workday)

Why This Session Matters

Employees dislike filing expenses, finance wants policy compliance, and leaders want accurate trip costs. This session shows how Workday reduces clicks and mistakes with real-time card data, trip-aware grouping, and smart defaults. It is useful for finance, HR operations, and anyone aiming to cut cycle time while improving policy adherence.

What Was Covered

The speaker walked through an end-to-end traveler journey, from booking to reimbursement. Core themes were bringing travel and expense closer together, using real-time card authorizations, and guiding the user only when action is needed. The Expenses Hub can link to your travel tool, email receipts can be forwarded into Workday, and real-time authorizations immediately create draft expenses that group into a trip window. Trip-level details like project or work tags cascade to new expenses to reduce data entry.

Automation focuses on high-volume categories such as airfare, meals, and ride share. Zero-touch patterns use third party merchant integrations, real-time notifications, and receipt capture at the right moment. The UI is being refreshed to surface next actions at the top, keep receipt and line details side by side, and support accessibility. Corporate card hotel folios can be auto-itemized, and mobile and desktop experiences stay in sync. Mileage is streamlined with saved locations and planned multi-stop routes. Throughout, users can review and submit only the lines that still need attention.

Key Announcements & Takeaways

- Trip-centric experience
    - Real-time credit card authorizations create draft expenses and start a trip window.

  - Expenses incurred within the trip inherit work tags like project or cost center.
  - A Trips card provides context and supports better trip cost reporting.
- Fewer clicks, smarter defaults
  - Forward receipts to Workday; the system creates or completes the expense.
  - Side-by-side receipt and line details reduce navigation.
  - High-volume categories (meals, ride share) target low-touch or zero-touch entry.
- Moment-of-truth capture
  - Push notification on payment lets the user snap the receipt immediately.
  - Automatic matching links the receipt to the authorization; ML can predict expense item.
  - Planned Attendee Assist suggests meal participants using unified employee and project data.
- Corporate card advantages
  - Hotel folios on Visa and Mastercard can auto-itemize into room, tax, and incidentals.
  - AMEX support is improving via expanded OCR for itemization.
- Mileage made simple
  - Save frequent locations; calculate reimbursement quickly.
  - Planned multi-point routing allows one line with multiple stops.
- Guidance and accessibility
  - Refreshed Activity page highlights what needs action now.
  - Logical field groupings, quick navigation, and screen reader support improve usability.
- Availability notes
  - Today, you can link travel from the Expenses Hub, forward receipts, and use real-time authorizations.
  - Corporate card hotel auto-itemization works for Visa and Mastercard.
  - Receipt-to-authorization auto matching is in early adopter and

- targeted for broader availability next year.
- Trip UI refresh, Trips card enhancements, merchant integrations, Attendee Assist, and multi-stop mileage are forward-looking.
- Practical steps to start
- Promote corporate cards for richer data and automatic hotel itemization.
- Enable receipt forwarding and real-time card feeds to reduce manual entry.
- Set trip-level work tags so new expenses inherit the right coding.
- Pilot zero-touch flows for meals and ride share with a small traveler group, then scale.

How to Get the Most Out of Supplier Management Across the Lifecycle

Finance

Speakers

Craig McFadyen (Workday)

Why This Session Matters

Supplier data, risk, and performance live across many teams and systems. This session shows how Workday brings the lifecycle together, from intake and onboarding to contracts, procurement, and reviews, with stronger supplier self-service and embedded third party risk. It is useful for procurement, sourcing, AP, and risk teams that want fewer handoffs, better governance, and faster cycle time.

What Was Covered

The session followed a supplier across the full source to pay flow, starting with project intake and competitive bids, then onboarding the awarded supplier into the master, and finally managing contracts, POs, invoices, and performance. A supplier-centric model and a unified supplier portal aim to reduce friction for both buyers and suppliers. The portal centralizes RFPs, forms, contracts, and transactional status, supported by multifactor authentication.

Supplier performance and third party risk are positioned as continuous processes, not one-off checks. Workday surfaces internal KPIs and external risk signals directly in a configurable Supplier 360. Prebuilt risk connectors cover financial stability, sustainability, security, and fraud, while open APIs allow additional sources. The roadmap expands real-time validations across strategic sourcing and procurement, adds bank account verification, and introduces no-code supplier workflows that automate actions when conditions change.

Key Announcements & Takeaways

- Supplier self-service, one front door
    - Unified supplier portal for onboarding, forms, RFPs, contracts, POs, and invoices.

- Reusable supplier profiles reduce duplicate data entry across multiple Workday customers.
- Accessibility and navigation improvements help suppliers complete multi-form packages.

- End-to-end lifecycle visibility
  - Move seamlessly from sourcing award to supplier master and into procure to pay.
  - Keep suppliers out of the transactional system until they are approved for PO and invoicing.
- Supplier 360 for decisions, not just storage
  - Configurable dashboard shows internal performance trends and external risk scores in one place.
  - Use it for QBRs and tiered supplier management, including action items and open tasks.
- Third party risk, ready to use
  - Prebuilt connectors for financial, sustainability, security, and fraud signals.
  - Bring scores into Supplier 360 for award and renewal decisions.
  - Subscription with each provider is required; credentials are set in Workday.
- Stronger onboarding controls
  - Goal is supplier self-service with real-time validations exposed during profile entry.
  - Data checks from procurement and financials (for example phone format) surface directly to suppliers and buyers.
  - Reduces sync errors and rework; keeps approval and activation in a business process.
- Bank account verification
  - Automated checks against external data help detect mismatches or risky accounts.
  - Addresses fraud scenarios before AP updates or payments occur.
- No-code supplier workflows
  - Trigger actions when conditions are met (for example risk threshold crossed).

- Possible actions include outreach to suppliers, status changes, field updates, tasks, and notifications.
- Supports proactive risk response and consistent supplier governance.
- Practical guidance to apply now
- Promote the unified portal and reusable profiles to cut email back-and-forth.
- Stand up Supplier 360 with a core set of KPIs and risk widgets, then extend.
- Turn on prebuilt risk connectors where you have subscriptions; use APIs for others.
- Start with validation rules for the most error-prone fields; expand after go-live.
- Define simple workflows for top risk scenarios, then iterate by category and region.

Innovation Insights: Next-Gen User Experience

Finance

Speakers

Deepa Ramalingam (Workday)

Why This Session Matters

Planning work is scattered across sheets, reports, and folders. People waste time finding assets, chasing updates, and explaining context. This session shows a next-gen experience that brings process, workflow, collaboration, and AI into one place so FP&A and planning teams can run cycles faster with fewer handoffs.

What Was Covered

The core concept is Planning Hubs, a customizable workspace built around a specific planning process, for example revenue or opex. A hub can contain dashboards, reports, full sheets, external links (Google Drive or SharePoint), and a panel to run relevant integration tasks. It also shows data recency so analysts know when to refresh. The design target is power users, especially FP&A modelers and analysts, who need all actions and assets in one view.

Configurable Workflows are the second pillar. A visual builder lets admins define to-do, submit, and approve tasks, choose where users land, and set participants and due dates. Approvals can include secondary reviewers, up to five additional approvers if needed. Workflows can be scoped by level and by account, and can run concurrently or in sequence. End users get a simple, guided task page via in-app, email, or Slack notification that opens to the exact context for data entry.

Collaboration moves into the product. Users comment on a chart or number, tag a colleague, and that person is notified in Slack with a deep link back to the exact view. Microsoft Teams notifications are planned. AI is woven through the experience. Ask Workday handles quick questions like summaries and anomaly checks.

Innovation Insights: Next-Gen User Experience

Finance

An AI Summary widget on the hub overview explains trends across selected metrics and flags data issues. Over time, the agent will also monitor workflow progress and send reminders automatically.

Key Announcements & Takeaways

- Planning Hubs, a process-first workspace
  - Build a hub per process; place dashboards, reports, and full sheets side by side.
  - Add external links and show data freshness; run integration tasks directly from the hub.
  - Designed for FP&A modelers and analysts who orchestrate the planning cycle.
- Configurable Workflows, flexible control
  - Drag-and-drop tasks (to-do, submit, approve) with participants, due dates, and landing pages.
  - Use secondary approvers for tighter control; allow up to five additional approvers.
  - Scope by level and by account, run revenue and expense workflows in parallel or sequence.
- Simple end-user experience
  - Users receive a Slack or email alert; the deep link opens the exact sheet and filters they need.
  - Guided page keeps context locked, so novices can enter data quickly and move on.
- In-product collaboration, not screenshots
  - Comment and @mention on a specific data point; recipients land in the same context.
  - Slack notifications live today; Microsoft Teams integration is planned.
- AI embedded where work happens
  - Ask Workday answers “summarize this report” and “spot anomalies” inside the hub.

    - AI Summary widget narrates trends and can flag suspicious patterns or load mistakes.
    - Roadmap includes agent-driven workflow insights and automated reminders.
- Availability and next steps
    - Collaboration features are available now to try.
    - Planning Agent is available as early access, expanding next.
    - Planning Hubs target 26R1, with an early access program starting in November.
- Practical guidance
    - Start by building one hub for your main planning cycle; include the top dashboards, one edit sheet, and key integrations.
    - Define two workflows, one for revenue, one for expense; test concurrent runs.
    - Enable Slack notifications and use @mentions to replace email threads.
    - Turn on the AI Summary widget for a small metric set, then expand after review.

Integrating Contract Lifecycle Management for Source to Pay

Finance

Speakers

Cory Jones (Workday)

Why This Session Matters

Contracts sit at the center of source to pay, yet data, status, and risk are often fragmented. This session explains how Workday is unifying Strategic Sourcing, CLM, and Procurement so buyers, legal, and AP work from one contract record with AI support. It is useful for procurement, legal, sourcing, and finance teams that want faster cycle times, stronger compliance, and better visibility.

What Was Covered

Workday outlined why it acquired Evisort, to deliver contract intelligence at scale, including conversational search across clauses, AI-assisted drafting, and accurate redlining. The roadmap focuses on deep, native integration across source to pay, plus touchpoints to Financials and HCM. The near-term build centers on a "Supplier Contract Agent" foundation that connects Strategic Sourcing, CLM, and Procurement with unified user management, shared status, synchronized metadata, and real-time handoffs.

A live demo showed a contract initiated in sourcing, negotiated in CLM, then pushed in real time into Procurement. Early integration synchronizes 18 header fields and provides cross-app deep links. Next wave enhancements include a single legal front door with conversational intake, expanded metadata (custom fields and AI-extracted attributes), line-item extraction to automate requisitions and POs, and embedded third party risk signals to drive contract decisions and approvals.

Key Announcements & Takeaways

- Unifying source to pay on one contract record
    - Strategic Sourcing, CLM, and Procurement connected with seamless navigation and shared status.

  - Initial sync covers 18 contract header fields, with plans to add custom fields and AI-extracted metadata.
- Why CLM from Evisort matters
  - Ask questions across your entire contract corpus and track results on dashboards.
  - AI drafting and redlining reduce review time and training effort.
- Real-time integrations and timing
  - New real-time CLM-to-Procurement contract integration replaces the legacy connector.
  - Real-time supplier sync from SRM to Procurement is being rebuilt for reliability.
- Unified supplier and user management
  - One place to manage users across CLM and Procurement, enabling approval routes that follow management hierarchy and out-of-office rules.
  - Better cross-product visibility for requesters, sourcing managers, and AP without system hopping.
- Legal front door and guided intake
  - Conversational intake routes requests to the right flow (for example NDA vs sourcing event).
  - Dynamic questions add required approvers or clauses when sensitive data or regulated scenarios are detected.
  - Keep requesters in core Workday for status and actions; CLM runs behind the scenes.
- Line-item extraction to drive buying and compliance
  - Extract service line items from executed contracts to auto-build requisitions and POs.
  - Compare actual spend to contracted terms to trigger rebates, tier discounts, or alerts when thresholds are reached.
- Embedded supplier risk in the contract flow
  - Bring risk signals from providers like financial stability and sustainability into CLM.
  - Use scores to block prepayments, require extra approval, or add clauses before signature.

- One-click document review
- Upcoming experience flags missing clauses and required edits, then applies fixes with a click.
- Practical steps for customers
- Start contracts in sourcing and complete negotiations in CLM; use deep links for traceability.
- Standardize key header fields now to benefit from early metadata sync.
- Pilot the legal front door for common requests and codify intake logic for sensitive data.
- Prepare coding and catalogs to leverage line-item extraction for services, then expand.
- Turn on risk widgets in Supplier 360 and define policy actions when thresholds are crossed.

Modeling Tips & Tricks for Workday Adaptive Planning

Finance

Speakers

Juan Maldonado (Workday)

Why This Session Matters

Many teams need to distribute existing plan data across an additional dimension without rebuilding models or using slow offline workarounds. This session shows a clean pattern to allocate personnel costs to a new dimension inside Adaptive, using only features available today. It is useful for FP&A and HR planning admins who want repeatable allocations with clear audit and strong performance.

What Was Covered

The session walked through a practical case, taking a simple personnel summary (salaries, benefits, taxes) and distributing it from two dimensions to three by allocating across a new Product dimension. The pattern uses two new sheets and a few targeted settings: a model sheet to capture allocation rates by level, product, and time, and a merged cube to combine those rates with unallocated personnel data. Calculations then apply the rates to produce allocated results at the new dimensional grain.

Key build choices improve usability and accuracy. On the rate sheet, cumulative balance time settings prevent percent rollups from looking wrong; percent formatting and decimal precision make entry consistent; and security is set to allow formula reference at any level. Copy forward accelerates time entry. In the merged cube, the modeler selects the right source sheets to merge, adds common dimensions, and defines two core accounts, an Allocation Rate pulled from the model sheet (filtered by the current product) and Allocated amounts that multiply the rate by the unallocated base while preserving other dimensions like Position. The session finished by validating results and clarifying when to use this approach instead of allocation rules.

Modeling Tips & Tricks for Workday Adaptive Planning

Finance

Key Announcements & Takeaways

- Build the allocation with two sheets, not a tangle of rules
  - Model sheet for rates: level, product, time.
  - Merged cube to join rates with unallocated personnel data and calculate results.
- Configure the rate sheet for clarity and correct rollups
  - Time settings: use cumulative balance so monthly percentages do not add up across quarters and years.
  - Formatting: set account as percentage with the needed precision.
  - Security: allow formula reference at any level to avoid common lookup errors.
  - Data entry speed: enter one month and use Copy Forward to fill the horizon.
- Set up the merged cube correctly
  - Source selection: explicitly choose which sheets to merge before adding dimensions.
  - Dimensions: include the common ones you need to preserve (for example Position) and the new allocation target (for example Product).
  - Access: assign the cube to all relevant levels so planners can see and validate results.
- Write two simple formulas
  - Allocation Rate (calculated account): pull the percent from the model sheet at top level, filtered to the current product and period.
  - Allocated Amounts (for example Salaries): multiply the Allocation Rate by the unallocated base; include filters to preserve required dimensions like Position.
- Validate the outcome
  - Open the allocated cube, expand by the new dimension, and confirm that totals match the base while detail splits according to rates.
  - Keep an eye on rollups and formatting so reviewers see intuitive numbers.

- Know when not to use allocation rules
  - Allocation rules move data between levels; they are not meant to distribute across an additional dimension.
  - Use a merged cube when the goal is to create a distribution to a new dimension using common keys.
- Practical first steps
  - Prototype with three products and one cost account, then generalize to benefits and taxes.
  - Standardize rate entry at top level to keep the formula simple and auditable.
  - Document the merge sources and filters so other admins can maintain the pattern.

The Future of Financial Audit with Agentic AI

Finance

Speakers

Brett Caron (Workday)

Why This Session Matters

Audit and controls work is still manual in many finance teams. Errors slip through, audit requests consume days, and monitoring is periodic, not continuous. This session outlines an agentic approach in Workday that tests data and processes all year, flags issues early, and automates evidence collection. It is most useful for Controllers, Internal Audit, and Finance Ops leaders who want stronger assurance with less effort.

What Was Covered

Workday presented three connected capabilities. A Financial Test Suite performs continuous tests across configurations, business processes, and transactions. A Financial Test Agent interprets results, recommends fixes, and can trigger actions such as holds. A Financial Audit Agent retrieves and compiles audit evidence from plain language requests, reducing back-and-forth with auditors.

The demo followed a controller using a central hub to view control confidence scores by process, drill into procure to pay risks, and act on duplicate invoices that were automatically held. The agent recommended expanding coverage via a Test Marketplace that will include standardized tests validated with KPMG and, over time, tests built by customers and partners. A conversational test builder showed how non-experts can create new tests; the agent locates the right data, drafts logic, sets cadence, and applies thresholds to reduce noise. Timelines shared, the Audit Agent is in early adopter with production targeted for March. The Test Suite and Test Agent are targeting their first release next year, with plans to expand evidence types and agent-to-agent workflows.

The Future of Financial Audit with Agentic AI

Finance

Key Announcements & Takeaways

- Vision, continuous oversight at scale
  - Move from periodic reviews to year-round testing; increase assurance while reducing manual checks.
  - Leverage Workday's single data model, business processes, security, and audit trail as the control foundation.
- Financial Test Suite, always-on testing
  - Runs standardized tests over configurations, approvals, and transactions to detect anomalies and control breaks.
  - Produces control confidence scores by area, weighted by severity, count, and impact.
- Financial Test Agent, from findings to action
  - Surfaces insights, recommends corrective actions, and can trigger holds on risky transactions.
  - Guides admins to add coverage where risk is high, notifies stakeholders, and tracks resolution.
- Financial Audit Agent, faster audit requests
  - Accepts plain language prompts, retrieves samples and support, compiles packages for auditors.
  - Cuts days of evidence gathering to minutes; maintains a history of prior requests.
- Test Marketplace, broadened coverage
  - Standardized tests validated with KPMG; roadmap to open for customer and partner-built tests.
  - Goal, expand test catalog without custom projects; enable community-driven assurance.
- Conversational test building, easier authoring
  - Agent identifies data sources, proposes test logic, sets cadence and materiality thresholds.
  - Increases coverage even for teams new to Workday objects and tables.
- Practical control scenarios, shown in demo
  - Duplicate invoices automatically held pending review; supplier outreach initiated with agent help.

   - Additional risks highlighted, period cutoff, PO splits violating approval policy, slow invoice processing.
- Timelines and availability
   - Financial Audit Agent, in early adopter now; production targeted for March.
   - Financial Test Suite and Test Agent, first version targeted next year; marketplace to expand over time.
- How to apply now
   - Start with audit evidence automation for recurring asks; measure time saved.
   - Pilot core anomaly tests in procure to pay; track reductions in duplicates and approval violations.
   - Define escalation rules the agent can act on, for example automatic holds, required approvals, notifications.
   - Join design partner programs to influence the test catalog and agent actions.

Tips and Tricks in Financial Reporting

Finance

Speakers
Sandeep Uppaluri (Workday)

Why This Session Matters

Financial reporting often explodes into many near-duplicate reports, heavy maintenance, and slow composite runs. This session focuses on practical features that reduce the number of reports you manage, speed up authoring, and keep interactivity without forcing users into Excel. It is most useful for reporting admins and power users who build and maintain Workday financial reports.

What Was Covered

The session was a live tour of admin-focused tips to streamline reporting. First, a dynamic control for accounting worktags turns a single trial balance into a flexible view that groups by up to five worktag types at run time, cutting the need for separate variants. Next, a "repeat column groups" pattern lets one composite report run at different company hierarchy levels through a simple lookup hierarchy calculated field and column mappings.

To accelerate build time, bulk row creation can generate composite rows directly from hierarchies, with options to include children, set order, and add outline behavior. Rows and their formatting can then be copied from a "template" report into other composites, even in bulk. Finally, scheduled reports can now render back in the UI, preserving drill, expand or collapse, and prompt context, which keeps large composites interactive without Excel downloads.

Key Announcements & Takeaways

- Dynamic worktag control for trial balance
    - Add a "Display Worktag Type" prompt and let users pick up to five worktag types at run time.
    - Benefits: one versatile report instead of many, simpler discovery for consumers.

- Dynamic repeat column groups in composites
  - Use a lookup hierarchy calculated field to return the desired hierarchy level.
  - Map data columns to that level so the same report can render at company, level 2, level 3, or level 4.
  - Benefits: consolidate multiple hierarchy-specific reports into one, reduce confusion and upkeep.
- Bulk row creation from hierarchies
  - Generate rows from company, cost center, or ledger account hierarchies with a few clicks.
  - Options: include summary nodes, include children, control insert order, and apply expand or collapse.
  - Benefits: turn hours of manual row setup into minutes.
- Copy or import rows between reports
  - Take the fully formatted row set from a "source" composite and import it into a "target."
  - Do it once or mass copy to many destination reports.
  - Benefits: reuse proven layouts, enforce standards, and avoid rework.
- Schedule to render in UI (keep it interactive)
  - Schedule heavy composites and matrix reports to produce an in-product result, not just a file.
  - Users get a notification, open the run with timestamps and prompts, then drill and interact as usual.
  - Benefits: preserve interactivity and reduce Excel sprawl.
- Practical admin guidance
  - Start by enabling dynamic worktags on your trial balance to collapse duplicates.
  - Build a single composite with repeat column groups for hierarchy-level views.
  - Use bulk row create for your key hierarchies, then copy rows into other reports for consistency.
  - Shift scheduled "big" reports to render in the UI to keep drill and analysis in one place.

Intelligent Variance Analysis and Predictive Analytics

Finance

Speakers

Nathan Ger (Workday)

Why This Session Matters

Finance and planning teams spend hours hunting for drivers and building reports before each review. This session shows how Workday's agentic approach brings variance analysis and predictive analytics into everyday planning, so teams can ask questions in plain language, get context-aware answers, and act inside the product. It is useful for FP&A leaders, analysts, and admins who want faster insight with less manual work.

What Was Covered

The session introduced Workday's view of AI agents and how they operate inside Adaptive Planning. An agent is a combination of a reasoning model, tools, memory, and an execution environment, with traits such as autonomy, perception, and action. Ask Workday is the single entry point that routes a user's question to the right skill, then returns a contextual answer based on where the user is working.

Three agent skills are the immediate focus. Contextual Help answers how-to questions using embedded documentation and the user's current context. Data Analysis generates summaries and charts on demand. Intelligent Variance Analysis finds, explains, and drills into top variances with thresholds the user can tune. Looking ahead, skills in development include a Formula Assistant to write or optimize formulas, quick Scenario Analysis for ad hoc what-ifs, and a Prediction Builder that lets users ask for forward-looking forecasts by natural language. The ML roadmap adds forecast explainability for external drivers and a new ARIMA algorithm to handle volatile time series.

Intelligent Variance Analysis and Predictive Analytics

Finance

Key Announcements & Takeaways

- Agentic planning inside Adaptive
    - Ask Workday acts as an intelligent router to agent skills.
    - Agents combine reasoning, tools, memory, and an execution environment to take action.
- Skills available or near-term
    - Contextual Help
        - Answers "how do I" questions in place, using the page context.
        - Reduces tickets and training time.
    - Data Analysis
        - Summarizes reports and produces charts without building new dashboards.
        - Early access in the current release train.
    - Intelligent Variance Analysis
        - Surfaces top variances with user-set thresholds by percent or count.
        - Supports drill to contributors directly from the result.
- Skills in development
    - Formula Assistant
        - Generates formulas from a prompt.
        - Audits existing formulas and suggests performance improvements.
    - Scenario Analysis
        - Creates quick what-ifs in minutes for HR or revenue questions.
        - Tracks deltas without heavy versioning.
    - Prediction Builder
        - Lets users request forecasts in natural language.
        - Uses Adaptive's ML engine to return forward views on selected series.

Intelligent Variance Analysis and Predictive Analytics

Finance

- Machine learning enhancements
  - Forecast explainability
    - Shows impact of external drivers such as CPI, weather, or job indices.
    - Helps teams prove or disprove assumptions with numbers.
  - ARIMA model option
    - Improves accuracy for volatile or seasonal accounts.
    - Complements existing ML algorithms in Adaptive.
- Operating model and governance
  - Agent System of Record defines which tools an agent can access.
  - Security, business process controls, and audit trail remain the foundation.
- Practical benefits for customers
  - Faster answers in meetings, fewer ad hoc reports to build.
  - Variance hunting and explanation in seconds, not hours.
  - Easier onboarding for new planners through contextual guidance.
  - Clearer forecasts by quantifying the effect of external factors.

Agent Interoperability: MCP, A2A, and More

IT

Speakers

Megan Rathie, Matt Banks (Workday)

Why This Session Matters

AI agents only create value when they can talk to each other and act on real enterprise data. This session explains two open standards that make that possible, Agent to Agent (A2A) for agents to collaborate, and Model Context Protocol (MCP) for agents to connect to systems and data. It is useful for IT, HRIS, and Finance leaders who want to move from chat-style insights to secure, real actions across their stack.

What Was Covered

The speakers framed today's problem, every system has different APIs and formats, which makes agents brittle and hard to scale. A2A solves agent-to-agent communication, creating a shared language so agents from different vendors can discover each other and coordinate tasks. MCP standardizes how agents access data and tools, so connecting Workday and other systems becomes plug and play.

Live demos showed this in practice. In Google Agent Space, a Workday agent found a worker and submitted time off directly in Workday, then verified it in the tenant. In Workday's Flowise Agent Builder, an MCP-enabled custom agent searched for a worker, posted performance feedback, and issued a one-time payment, all by selecting Workday tools exposed through MCP. The session closed with governance, Workday's Agent System of Record registers agents, applies security, tracks actions, and helps quantify ROI.

Key Announcements & Takeaways

- A2A, a shared language for agents
  - Interoperability: agents from different platforms can talk, hand off tasks, and work toward a shared outcome.
  - Discoverability: agent cards advertise skills so the right agent is selected at run time.

Agent Interoperability: MCP, A2A, and More

IT

  - Reduced custom work: fewer one-off integrations between systems; agents coordinate through the protocol.
- MCP, a standard way to access data and tools
  - Plug and play: connect Workday data and actions to the broader agent ecosystem using an open standard.
  - Tool selection: expose specific Workday APIs as MCP tools per functional area (for example Staffing, Compensation, Performance).
  - Faster custom agents: builders wire an LLM to MCP tools, then act in Workday with audit and security.
- A2A and MCP together, from insight to execution
  - Real-time accuracy: agents operate on current data, not stale exports.
  - Business context: agents understand org structure and business processes, so they can take correct actions.
  - Secure by design: solutions inherit Workday security models, approvals, and audit trail.
- Demo highlights
  - Natural workspace action: from Agent Space, the Workday agent located a worker and submitted time off, then confirmed the change in Workday.
  - Custom appreciation agent: in Flowise, an MCP agent searched for a worker, posted feedback on a project, and created a small one-time payment.
- Agent System of Record, governance for scale
  - Registration and policy: onboard all agents in one place; define which tools they can use.
  - Monitoring and audit: track invocations, outcomes, and exceptions with enterprise logs.
  - Value tracking: measure adoption and time saved to prove ROI; manage both human and digital workforces together.

Agent Interoperability: MCP, A2A, and More

IT

- Practical steps to start
    - Identify two high-value tasks that cross systems, for example time off changes or feedback capture; pilot with an A2A-enabled Workday agent.
    - Stand up MCP with a minimal tool set, for example Worker search and Feedback, then add Compensation or Procurement as confidence grows.
    - Define guardrails early, who can invoke which tools, what approvals are required, and what to log.
    - Use natural workspaces your users already live in, Slack, Agent Space, or similar, then deep link back to the exact Workday context.

Boosting Productivity Agents in MS365 Copilot, Salesforce and Google

IT

Speakers
Maddie Buss (Workday)

Why This Session Matters
Most employees and managers do not live in Workday all day. If self-service only works inside Workday, adoption suffers and tickets rise. This session explains how Workday's self-service agent shows up inside Microsoft 365 Copilot, Salesforce Agentforce, Google Agent Space, Teams, and Slack to reduce context switching and speed up routine tasks.

What Was Covered
The session introduced Workday's self-service agent as the evolution of Workday Assistant. Ask Workday is the entry point; once enabled, users can ask questions or take actions from the tools they already use. Live demos showed examples in Microsoft 365 Copilot, Salesforce Agentforce, Google Agent Space, and the existing Workday for Teams and Slack apps.

Key themes were simple setup, consistent experience across platforms, and the ability to combine Workday data with data from Microsoft or Salesforce for richer answers. The roadmap and timing were clear, Copilot is in early adopter, Agentforce starts early adopter next year, Google Agent Space is in development, and the self-service agent arrives in Teams and Slack in 26R1 with an 18-month overlap to transition from Workday Assistant.

Key Announcements & Takeaways
- One self-service agent across major workspaces
    - Microsoft 365 Copilot
        - Workday app inside Copilot; users can see what is due, approve items, and ask talent questions.
        - Combine Workday data with Microsoft 365 notes or files to generate talking points or drafts.

        - Status, in early adopter, continuing through the fall.
    - Salesforce Agentforce
        - Add Ask Workday from Agent Exchange to the agent builder; ready out of the box.
        - Adjust instructions, scope, and permissions; deploy to Salesforce and Slack.
        - Status, early adopter program planned for early next year.
    - Google Agent Space
        - Use Workday inside Google's agent hub. Example, detect birthdays, anniversaries, or learning due during PTO, draft and schedule Gmail messages.
        - Status, early development; seeking interested customers.
    - Microsoft Teams and Slack
        - Self-service agent embedded in existing Workday apps; more conversational than today's Assistant.
        - Status, available in 26R1; Workday Assistant remains supported for at least 18 months.
- Expected value for customers
    - Reduce HR and IT case volume by answering payslip, time off, learning, and goal questions in place.
    - Improve manager productivity with cross-system context, for example talent highlights plus one-on-one notes.
    - Keep casual users in their flow of work; fewer clicks and fewer tabs.
- Adoption proof points and readiness
    - Workday for Teams and Slack already serve a large installed base, showing the path to scale.
    - Consistent user experience across tools lowers training needs.
- Governance and setup guidance
    - Configure agent permissions and guardrails in the builder; actions respect Workday security and approvals.
    - Track usage and outcomes to show time saved and case deflection.

- Practical next steps
  - Enable or review the Workday apps for Teams and Slack; plan a 26R1 pilot.
  - Join Copilot early adopter if you use Microsoft 365; nominate use cases like approvals, payslip Q&A, and talent summaries.
  - Prepare for Agentforce by aligning goal and feedback processes that benefit from Salesforce data.
  - Define guardrails, logging, and owner responsibilities before broad rollout.

Driving Innovation at Workday with AI

IT

Speakers
Akash Kapoor (Workday)

Why This Session Matters
Many AI projects fail to show real value. Teams pilot tools without scale, data quality is uneven, and governance is unclear. This session explains how Workday organizes for AI impact, which use cases already deliver measurable gains, and what operating model helps AI move from pilots to production. It is most useful for CIOs, HRIS, Finance Ops, and transformation leaders.

What Was Covered
Workday's internal AI journey follows three phases: Accelerate (adopt off-the-shelf AI to build habits), Assist (targeted use cases with clear ROI), and Transform (reimagine core processes with agents). Early wins included rolling out Gemini and Zoom AI to all employees to create daily usage patterns. The company then partnered with each business function to pick high-value use cases such as case deflection in support, faster developer cycles, and sales assist for account teams.

The session highlighted live examples. A generative Community Assistant speeds support by suggesting answers during case creation. Developer capacity improved using coding copilots. Sales Companion reduces admin load and response time. Workmate Companion, a universal internal agent in Slack and Horizon, helps employees self-serve HR, IT, and policy questions in one thread. In HR, AI reduces screening volume; in Finance, Adaptive forecasting improves cash flow accuracy; contract intelligence tools cut operating costs. The second half covered how Workday runs AI at scale: an executive AI committee, a central AI strategy team, a best-of-breed platform stack, a universal data layer with knowledge graph, an Agent System of Record for governance, in-house evaluations for safety, hyper-agile AI pods, and a company-wide change program to drive adoption.

Driving Innovation at Workday with AI

IT

Key Announcements & Takeaways

- Proven internal use cases with measurable impact
  - Customer support and community
    - Generative search and a case creation assistant steer users to answers before raising tickets.
    - Early results show faster time to resolution and fewer hand-offs.
  - Product and engineering
    - Coding copilots (for example GitHub Copilot, Cursor, XO Copilot) increase developer capacity.
    - More feature velocity and quicker fixes seen across teams.
  - Sales and go-to-market
    - Sales Companion accelerates RFP responses and reduces weekly admin time for AEs.
    - Better account planning with consolidated product and customer insight.
  - Employee experience
    - Workmate Companion in Slack and Horizon centralizes HR, IT, and policy self-service.
    - Private chat, ticket creation, and live-agent handover in one thread.
  - HR and Talent
    - AI in recruiting lowers manual screening workload and shortens cycle time.
  - Finance and Legal
    - Adaptive predictive forecasting reduces cash flow variance.
    - Contract intelligence and review automation lower operating costs.
- Operating model that scales beyond pilots
  - Executive sponsorship and portfolio governance
    - Cross-functional AI executive committee aligns investments to business outcomes.
    - Clear path from POC to rollout avoids "pilot purgatory."

- Central AI strategy and product
  - A core team partners with functions to define use cases, value targets, and metrics.
  - Shared patterns prevent duplicated efforts and agent sprawl.
- Platform and data foundations
  - Best-of-breed approach, including Flowise and knowledge platforms, to speed build and standardize agents.
  - Universal data layer and knowledge graph connect documents, emails, CRM, and Workday objects.
- Governance and safety by design
  - Agent System of Record registers agents, tool access, and policies.
  - In-house evaluations test for toxicity, bias, and quality before release; enterprise logging for audit.
- Delivery model and change
  - Hyper-agile AI pods with weekly or biweekly sprints; prompt engineers and AI product managers embedded.
  - "Everyday AI" learning program raises adoption across general and specialized tools.

- Practical lessons for customers
  - Secure executive sponsorship early; tie each initiative to a measurable business goal.
  - Escape pilot purgatory; choose a platform stack and move to production with guardrails.
  - Prioritize value over vision; deliver small wins and expand.
  - Choose progress over perfection; iterate fast while monitoring risk.
  - Embed risk and governance from the start; treat safety as a requirement, not a phase.
  - Invest in change as much as in technology; training and habit-building drive real ROI.

Integration and Automation Patterns for Success with Workday Orchestrate

IT

Speakers

Doug Lee (Workday)

Why This Session Matters

Many teams still judge Orchestrate by old Studio habits, which leads to overbuilding and slow integrations. This session explains the core patterns that make Orchestrate faster to build, easier to support, and fit for long-running work. It is useful for integration leads, HRIS, and IT who want to modernize Studio portfolios without losing power.

What Was Covered

The session reframed how to select the right tool. Start with Orchestrate as the default, then reserve Studio for narrow edge cases. Orchestrate limits choices on purpose, which guides developers to simpler designs that the platform can optimize at runtime. The runtime can "sleep" during long external calls and resume on completion, so short orchestration limits do not block real-world, hour-long processes.

A demo showed a practical pattern. An orchestration generated a large PDF set, then synchronously triggered a small Studio utility to split the file into many single-page PDFs. The orchestration slept while Studio ran, then woke, looped the outputs, and prepared follow-up actions. The message was clear, keep complex logic where the platform is strong, call out to Studio only for the specialized step. Admins manage Orchestrate like any other integration and benefit from a web-based designer that ships updates quickly.

Key Announcements & Takeaways

- Use Orchestrate by default
  - Fewer implementation choices lead to simpler, faster builds and easier upskilling.
  - Platform optimizations handle complexity behind the scenes.
- Rethink "long-running equals Studio"
  - Orchestrate can pause during long API jobs, then resume when results are ready.

    - Perceived 20-minute limits do not mean 20-minute processes; the runtime manages sleep and wake.
- Pattern for complex flows
    - Keep the orchestration short and clear, handle coordination and data movement.
    - Call a focused Studio integration only for the niche function that needs Java or custom logic.
    - Result, simpler support, less code, and reliable performance.
- Synchronous trigger to other integrations
    - Orchestrate can launch another integration and wait for it to finish, then continue.
    - Enables one end-to-end run without manual stitching or frequent polling.
- Demo highlights
    - Generate one large PDF, hand off to a Studio utility to split into many files.
    - Orchestration sleeps while Studio executes; on completion it wakes and processes outputs.
    - Zip handling and simple loops make post-processing straightforward.
- Developer and admin experience
    - Web-based designer, no desktop installs; rapid feature delivery.
    - From an admin view, Orchestrate executions look and behave like other integrations.
    - Execution trace shows parent orchestration, child integrations, and resume points for clarity.
- Practical guidance to apply now
    - Start migrating routine Studio jobs where logic is glue or sequencing, not heavy transformation.
    - Design for short, modular steps; let the platform manage the waits.
    - Keep a small library of Studio utilities for specialized tasks, then invoke them from Orchestrate.
    - Use run histories to spot sleep and resume events, and to explain timing to stakeholders.

Introducing Conversational Reporting: Faster Insights, Better Decisions

IT

Speakers

Padma Ayyadurai (Workday)

Why This Session Matters

Most users struggle to get answers from reports, even when data is in Workday. Filters take time, people export to Excel, and analysts answer the same questions. This session explains Conversational Reporting, a new way to ask questions in natural language, get trusted answers with explanations, and act faster without leaving Workday. It is useful for HR, Finance, and analytics teams that want self-service insight with governance.

What Was Covered

The session positioned Conversational Reporting as a core reporting experience inside Workday. Users ask questions in plain language on top of existing advanced or matrix reports, including those built on standard, indexed, Prism, or business view data sources. The assistant interprets the question, returns an answer with a clear explanation, and keeps context across follow-up questions.

Security and trust were emphasized. Data and queries are processed in Workday-managed AI infrastructure on AWS, with SOC controls. The early adopter supports standard and custom reports, with a roadmap for all eight report types. Live demos showed HR and procurement use cases, for example finding employees with AI skills, exploring retention risk and performance, and summarizing supplier contracts for a specific vendor. A finance demo narrated the income statement drivers, highlighted sustainability of results, and suggested next actions.

Key Announcements & Takeaways

- What it is
  - Natural language on top of Workday reports, with answers and transparent explanations.
  - Works with standard and custom reports; supports advanced and matrix today.

  - Operates inside Workday with security, approvals, and audit.
- How it helps different users
  - Business users
    - Self-serve answers without waiting on analysts.
    - Stay in the flow of work, less time hunting filters.
  - Data and analytics teams
    - Fewer repetitive requests; focus on high-value analysis.
    - Higher ROI from existing reports and BI investments.
  - Leaders
    - Faster decisions with consistent, governed data.
    - Less Excel sprawl and better compliance.
- Demos and patterns to copy
  - HR skills and retention
    - Ask "How many employees have AI skills?" then "How many are high retention risk?" with context carried over.
  - Procurement contracts
    - Ask "How many contracts with Dell?" then "What is the total approved amount?" and "Summarize by supplier and status."
  - Finance variance story
    - Ask "What are the primary drivers?" then "Is the gross margin improvement sustainable?" and "Why is net income high?"
- Roadmap highlights
  - Suggested prompts to kickstart questions.
  - Redirection when a question is outside the report's scope, with deep links to the right report or task.
  - Drillable answers with visualizations; response format control (text, bullets, chart).
  - Prompt history to save and reuse common month-end questions.
  - Dynamic parameter changes in place (switch company, ledger, or period without losing context).
  - Co-pilot for report authoring to help build or refine reports.

Introducing Conversational Reporting: Faster Insights, Better Decisions

- Governance and trust
  - Workday-managed AI infrastructure on AWS; SOC-controlled environments.
  - Source transparency in every answer, including assumptions and how the result was produced.
  - Practical next steps
  - Start with one high-usage advanced or matrix report; enable Conversational Reporting for a pilot group.
  - Capture common Q&A as suggested prompts and prompt history for repeatable use.
  - Use redirection to streamline actions, for example deep link from analysis to a one-time payment task.
  - Measure time saved on ad hoc questions and reduced Excel exports to show value.

Leading with the Value of Agents

IT

Speakers
Mohan Rajagopalan, Scott Erickson (Workday)

Why This Session Matters
Everyone is investing in AI agents, but many teams struggle to prove value and control sprawl. This session explains how to measure ROI, govern agents across vendors, and scale safely. It is useful for CIOs, HRIS, Finance Ops, and business leaders who want a practical framework to deploy agents and show results.

What Was Covered
The speakers outlined the agent lifecycle, design, govern, deploy, and continuously optimize. They introduced Workday's Agent System of Record as the place to register agents, set policies, and measure adoption and outcomes. Three categories were covered, Workday-built agents, partner-built agents, and customer-built agents. The message, embrace an open ecosystem, but manage it with common guardrails, security, and audit.

The value model focused on meeting workers where they work, reducing cases and rework, preventing errors, and completing business processes faster and with fewer handoffs. A partner case study showed measurable savings by using an agent to generate job offers at scale, ensuring every offer gets a quality review, not just the highest-value cases. The talk closed with the operating model needed to avoid "Burning Man" chaos and move toward a "Coachella" approach, open participation on top of strong infrastructure and controls.

Key Announcements & Takeaways

- How to think about agent value
  - Drivers
    - Meet users in the tools they use, reduce context switching.
    - Deflect HR and IT cases, answer common questions before tickets.

        - Prevent bad data and policy breaches with proactive checks.
        - Complete Workday business processes faster, with audit.
    - Metrics
        - Time saved per task or process.
        - Case deflection rate and first-contact resolution.
        - Error reduction and compliance events avoided.
        - Adoption, active users, and assisted transactions.
- Agent lifecycle and governance
    - Design
        - Define the job-to-be-done, who the agent acts for, and required tools.
        - Choose where the agent works, in Workday, Slack, Teams, or partner platforms.
    - Govern
        - Register in the Agent System of Record, set permissions, and approvals.
        - Decide if the agent acts on behalf of a user or runs in background.
    - Deploy and orchestrate
        - Integrate with Workday processes and external systems as needed.
        - Monitor outcomes, cost, and drift from intended behavior.
    - Optimize
        - Tune prompts, thresholds, and routing; retire low-value skills.
- Open ecosystem, one control plane
    - Workday agents
        - Built by Workday, aligned to core processes like payroll, time, and performance.
        - Benefit from Workday security, business processes, and audit trail.
    - Partner agents
        - Extend reach across systems where partners have domain depth.

        - Registered and governed alongside Workday agents for visibility.
    - Customer-built agents
        - Built with tools like Extend, Flowise, Copilot Studio, or Sana.
        - Subject to the same policies, logging, and ROI tracking.
- Case study, offer management agent
    - Problem
        - Only high-value offers received formal review; most offers went unchecked.
        - Recruiters leaned to the top of ranges to move faster.
    - Agent outcome
        - Generated data-driven offers at scale, covering the 70 percent that were not reviewed.
        - Savings achieved, about 5 percent on base salary and 20 percent on equity for the covered offers.
        - Example impact, roughly 3,800 hires in one month yielded about 30 million dollars in savings.
- Operating model lessons
    - Avoid agent sprawl
        - Central registry, clear ownership, and shared dashboards for value.
    - Balance freedom and control
        - Encourage partner and custom agents, keep security and audit consistent.
    - Prove value early
        - Start with two to three cross-system use cases where time saved and error reduction are easy to measure.
    - Plan for continuous change
        - Treat agents like a digital workforce, with onboarding, monitoring, and ongoing performance reviews.

Product Insights: Workday Security Enhancements

IT

Speakers
Randy Oh, Jennifer Wong (Workday)

Why This Session Matters
AI and automation raise the bar for identity, access, and monitoring. Security teams need to stop bad actors without slowing trusted users, govern digital workers like humans, and get one place to manage it all. This session explains Workday's new risk-based authentication, an agent security framework, and a Security Admin Hub to simplify control and visibility.

What Was Covered
The session introduced three pillars. First, Risk-Based Authentication adds a real-time risk score to every sign-on, starting with suspicious bot detection. Customers analyze score distributions, set thresholds, and choose actions such as allowing, challenging, or blocking a session. Second, the Agent Security Framework gives AI agents first-class identities with OAuth-based authentication, strict scoping to specific skills, and runtime checks that both the human and the agent have the right domain and business process access. Agents are registered and governed in the Agent System of Record with granular interaction policies.

Third, the Security Admin Hub centralizes high-usage security tasks and reports. Admins see sign-on trends and lockouts, jump to common tasks, and customize quick links. The roadmap adds privileged account views and more out-of-the-box security analytics. The session closed with a security roadmap covering near-term releases and single sign-on improvements for external-facing flows.

Product Insights: Workday Security Enhancements

IT

Key Announcements & Takeaways

- Risk-Based Authentication (RBA)
  - What it does
    - Adds a risk score to each sign-on, initially focused on suspicious bot activity.
    - Lets customers analyze score bands, set thresholds, and define actions such as block at login.
  - How to use it
    - Review score distributions with standard reports, drill into high-risk sessions, and inspect access to sensitive tasks.
    - Configure thresholds and actions in a new RBA section under tenant security setup.
  - Value
    - Real-time fraud deterrence with minimal friction for trusted users.
    - Data-driven tuning based on your tenant's actual risk profile.
  - Timing
    - Initial availability targeted for 26R1, with more signals and flows planned.
- Agent Security Framework
  - Identity and auth model
    - New Agent System User (ASU), distinct from ISU.
    - OAuth alignment for two modes: on-behalf-of (captures both human and agent) and ambient (agent acts as itself).
  - Least privilege by design
    - Agents authenticate with finite scopes tied to specific skills, not blanket system access.
    - Zero-trust runtime checks ensure both the human and the agent meet domain and BP policies, preventing confused-deputy issues.
  - Governance
    - Agent System of Record as the registry for all agents.
    - Agent interaction policies control who can use each skill; skills can be enabled per audience.

    - Value
        - Human-grade identity, audit, and approvals for digital workers.
        - Clear guardrails to scale agents safely.
- Security Admin Hub
    - What it offers
        - One-stop entry for top security tasks and overviews.
        - Standard sign-on reports for successful and failed attempts, plus quick views of locked accounts.
    - Flexibility
        - Customize quick actions and embed links to your own security reports or hubs.
        - Tasks organized by clear categories (for example accounts, authentication, configurable security).
    - Value
        - Faster triage, fewer bookmarks, easier onboarding for new security admins.
    - Roadmap
        - More built-in security analytics and privileged account visibility to follow.
- Broader security roadmap highlights
    - Recently delivered and near-term
        - Enhancements to user-based security groups and audit reporting.
        - Security Admin Hub and rule-based security updates for compensation review.
        - Candidate SSO options with Apple, Google, and LinkedIn to reduce application friction.
    - Coming in 26R1
        - RBA and Agent Security Framework.
        - Unified Provisioning and Authentication Service (UPAS) across selected Workday products for consistent provisioning and seamless deep links.
    -

Product Insights: Workday Security Enhancements

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- Practical steps for customers
  - Start with analytics
    - Turn on sign-on reporting in the hub, review high-risk bands, and define your initial RBA threshold.
  - Govern agents early
    - Register agents in the Agent System of Record, set interaction policies, and restrict skills to pilot groups.
  - Simplify the admin experience
    - Consolidate commonly used tasks and custom reports into the hub for your security team.
  - Prepare for rollout
    - Document domain and BP checks for critical agent skills, and plan an escalation path for blocked high-risk sessions

Extend Professional: Learn How to Unlock New Value and Multiply ROI

IT

Speakers
Vanessa Blount (Workday)

Why This Session Matters
Many customers want to build lightweight apps and agents inside Workday, but struggle with speed, skills, and governance. This session explains what Workday Extend Professional adds on top of Extend, how to infuse AI into apps safely, and how developer tools cut build time. It is useful for HRIS, IT, and product owners who want faster delivery and higher ROI from the Workday platform.

What Was Covered
The session introduced Workday Extend Professional as a bundle of capabilities for building custom apps and agents. A live demo showed Flowise Agent Builder creating a simple "request a corporate card" agent, with a visual flow and test chat to trace execution. The talk then covered AI building blocks available to Extend apps, including Workday AI Gateway services such as document intelligence, ML forecaster, Skills Cloud, sentiment analysis, and natural language data query, plus native AWS AI integrations and AWS Lambda for complex logic.

Generative AI for the developer experience was a second focus. Workday Developer Copilot now generates validation scripts and functions, produces WQL on request, and can scaffold a working page from that WQL with preview. API Copilot will search across thousands of Workday APIs in natural language. Orchestrate Copilot will generate end-to-end orchestrations and documentation from a prompt. The session closed with two operational items, higher data storage for model objects and developer SSO to streamline access.

Extend Professional: Learn How to Unlock New Value and Multiply ROI

IT

Key Announcements & Takeaways

- Build agents with Flowise Agent Builder
  - Visual builder to design and test custom agents that act in Workday.
  - Demo: chat request for a corporate card, agent executes the flow and updates the worker record.
  - Availability: included with Extend Professional, targeted first half of next year.
- Infuse AI into Extend apps
  - Workday AI Gateway
    - Document intelligence to extract fields from uploaded documents.
    - ML forecaster for quick predictions on your datasets.
    - Skills Cloud for extraction and gap analysis in skills use cases.
    - Sentiment analysis to check tone before submissions.
    - Data query to ask natural language questions and discover reports or tasks.
  - Native AWS AI and Lambda
    - Access pre-trained services such as text extract, recognition, translate, and comprehend.
    - Use AWS Lambda to run complex logic in your preferred language and call it from Extend apps.
- AI Widgets for end users
  - Add generate or refine actions to rich text fields inside apps, for example create and improve contribution goals from a job profile and org objectives.
  - Availability: targeted for next year around R1.
- Developer Copilot improvements
  - Code assistance
    - Generate validation scripts and functions, with guidance on where to insert them.
    - Example: enforce a minimum gap between two dates, or sum prior requests across a year.

- Data and UI generation
  - Generate WQL from a prompt, then auto-create a page and preview it.
- Timing
  - New Copilot features release with R2 this week.

- API Copilot and Orchestrate Copilot
  - API Copilot
    - Natural language search across more than 5,000 Workday APIs, compare schemas, and pick the right endpoint.
    - Availability: before year-end.
  - Orchestrate Copilot
    - Describe the target flow in plain language, get a runnable orchestration and auto-generated documentation.
    - Availability: later next year.
- Scale and security in Professional
  - Higher data storage
    - Model objects support up to 100 million instances, suitable for high-volume apps.
    - Available today.
  - Developer SSO
    - Use Okta, Microsoft Entra, or Ping to provision and control access to the developer site.
    - Simplifies onboarding and credential management.
- Practical steps
  - Start with one high-impact agent in Flowise, for example card requests or feedback capture.
  - Add AI Widgets to an existing app where users write text often, like goals or coaching notes.
  - Use Copilot to generate WQL and validation scripts, then standardize the patterns for your team.
  - Plan AWS services and Lambda for the few tasks that need advanced AI or heavy logic.
  - Enable developer SSO and review model object retention now that storage limits are higher.

Workday Guidance: Unlocking the Next Level with AI

IT

Speakers

Linda Mackessy (Workday)

Why This Session Matters

Workday Guidance is becoming a core layer for in-app help, automation, and AI assistance. If you want to reduce clicks, speed up task completion, and cut spend on third-party guidance tools, this roadmap shows what you can use now and what is coming next.

What Was Covered

The session traced the evolution of Workday Guidance from foundational in-product help to AI-powered experiences. Early releases focused on feature highlights, product tours, and an admin workspace to manage guidance content. The next phase deepened capability with translations, audience segmentation, intelligent field suggestions, and reporting that shows where guidance will have the most impact.

The roadmap centered on AI. Highlights include AI-generated quick tips that scale across languages, a global entry point into Ask Workday, a self-service agent that reduces steps with generative UI, tight handoffs to Workday Help for case creation, and AI-generated walkthroughs with human-in-the-loop review. Built-in feedback loops will capture thumbs up or down with reasons to drive continuous improvements.

Key Announcements & Takeaways

- Guidance today
  - Feature highlights and product tours, directly in product.
  - Guidance Workspace for admins to create and manage quick tips; add context, links, and documents; collaborate with version details.
  - Segmentation and translations to target content by role, location, and language.

    - Intelligent field suggestions to pre-surface likely inputs and speed task completion.
    - Analytics and insights
        - Engagement metrics, such as quick-tip clicks.
        - Guidance Potential Index that recommends roughly 20 high-value tasks to target first.
    - Proven adoption and ROI
        - 1,000+ customers live.
        - 150+ third-party decommissions and more than $37M in savings cited.
- What is coming next
    - AI-generated quick tips
        - Auto-create multilingual tips from your context; manual tips always take priority.
        - Designed to cut the time required to produce and maintain content.
    - Ask Workday, unified entry and conversational help
        - Global access point to build a clear mental model for users.
        - Self-service agent, the evolution of Workday Assistant, focused on faster outcomes.
        - Generative UI patterns (tables, dynamic buttons) to reduce clicks and clarify choices.
        - Seamless handoff to Workday Help to create a case when needed.
    - AI-generated walkthroughs
        - Step-by-step guides built from your documentation; quality assured with human review.
    - Continuous feedback loops
        - Thumbs up or down with reason capture; signals flow back to improve responses and content.

Workday Guidance: Unlocking the Next Level with AI

IT

- Practical guidance for customers
    - Start with the Guidance Potential Index to pick the first 10 to 20 tasks; measure quick-tip clicks and completion time.
    - Use segmentation and translations from day one; keep content specific to role and location.
    - Pair Guidance with Ask Workday; use the global entry point to train user habits.
    - Plan for AI content ops
        - Define review workflows for AI-generated tips and walkthroughs.
        - Set guardrails for tone, sources, and approval before publishing.
    - Track value
        - Monitor reductions in support tickets, time to complete tasks, and decommissioned tools.
        - Use feedback reasons to prioritize fixes and new content.

Workday Orchestrate: Your Starting Point for Accelerated Integration

IT

Speakers
EE Jones (Workday)

Why This Session Matters
Orchestrate is now generally available and positioned as the primary tool for building Workday integrations. It speeds up delivery with low code patterns, tight links to Business Processes, and stronger observability. If you want faster builds, easier maintenance, and fewer point tools, this session shows how to start and what to expect.

What Was Covered
The session introduced Orchestrate as a high-performance, highly connected workflow tool for integrations, with strong interoperability across Workday. It supports both batch data exchanges and event-driven flows triggered from Business Processes, and can be embedded in Extend apps and future agent use cases.

A live walkthrough covered the developer site, creating an integration app, using components to transform data (for example, building JSON from launch parameters), deploying to a tenant, and monitoring with the activity dashboard and debugger. The talk explained the two orchestration types available at GA and when to choose each. It closed with enablement steps in tenant, user management on the developer site, and a look at roadmap themes such as copilot-assisted building and deeper log viewing.

Key Announcements & Takeaways
- General availability and positioning
  - Orchestrate is GA with the R2 release; use it as the default for custom integrations going forward.
  - Studio is not deprecated, but most new custom work should use Orchestrate.
- Two orchestration types, when to use what
  - Integration System orchestration

        - Best for classic integration needs; supports storing documents, calling reports, adding integration messages, attaching files to the integration event.
    - Business Process–triggered orchestration
        - Best for very high-volume, near real-time scenarios and actions tied to BP events (including corrections, rescinds, denials, cancellations); does not create an integration event for file storage.
- Core capabilities that matter in practice
    - Build faster with a friendly UI, hundreds of functions, drag-and-drop components, and quick JSON creation.
    - Connect widely, call Workday and external APIs, transform and enrich data, generate files, and orchestrate end-to-end flows.
    - Interoperate with Business Processes to remove manual steps and speed outcomes.
    - Scale without hand-tuning performance; streaming and optimization are handled by the platform.
- Observability and troubleshooting
    - Activity dashboard and log viewer for event drill-down and error analysis.
    - Debugger shows transformations in context, with references back to inputs like launch parameters.
- Access and setup path
    - In tenant, use the Orchestrate opt-in tasks as applicable; extend customers are already enabled from R1.
    - Admin receives emails to activate the developer site, then manages users and roles (admins, developers).
    - In the developer site, create the integration app, then configure the new "Workday Integration" template in tenant with orchestration name and app reference ID, add launch parameters, and run.

- Security, transformations, and migration notes
  - Security is the same model you use today for integrations.
  - No XSLT; use Orchestrate components (for example, Create JSON) to achieve equivalent transforms.
  - You cannot convert Studio .clar files into Orchestrate flows; rebuild is required.
- First steps for teams
  - Start in the developer site's Get Started area and tutorials; build a simple orchestration that reads a launch parameter and produces a JSON file.
  - Establish basic standards for naming, launch parameters, error handling, and monitoring.
  - Prioritize event-driven automations where Business Process triggers can remove manual handoffs.

Real-Time Finance, Real Results: Optimizing Student Billing in Workday

Student

Speakers

Eric Christy (Workday)

Why This Session Matters

Student billing delays create inaccurate balances, poor payment decisions, and heavy admin work. Real-time Student Accounts moves billing, payment application, and accounting to immediate processing. Finance, bursar, and student teams get accurate data faster, fewer nightly jobs, and a better student experience.

What Was Covered

The session walked through the evolution from period records to admin refresh, then self-service refresh, and now real-time processing. Any action that changes a student's balance (registration, residency or cohort change, imports) triggers immediate charge and waiver updates, payment application, and accounting.

The talk shared adoption data, performance results, and a demo of how to enable real time and new accounting optimizations. It also introduced Mass Operation Management to apply charges at scale, common for late fees. A walkthrough showed registration and residency changes updating balances instantly, consolidated journals for finance, and new reporting links to see which charges were grouped into each journal.

Key Announcements & Takeaways

- Real-time Student Accounts
  - Immediate processing of charges, waivers, payment application, and accounting on every qualifying action.
  - More accurate bills in third-party payment portals, fewer overpayments and refunds, fewer dropped courses due to stale data.
  - Past-due hold logic reacts to balance changes in real time, reducing manual removals.

Real-Time Finance, Real Results: Optimizing Student Billing in Workday

- Adoption and performance results
  - Early adopters showed high event volumes processed quickly, with average run times in single-digit seconds.
  - Accounting throughput improvements reported up to roughly 95 percent in large-scale scenarios.
- Release timing and opt-in
  - Preview available ahead of release.
  - Early adopter production opt-in supported via support case, then tenant enablement.
  - General availability targeted for a future release if you prefer to wait.
- Accounting optimization in 25R2
  - Fewer, larger journals for the same student event, with receivables aggregated when work tags match.
  - Same granular revenue lines preserved; easier reconciliation with fewer journal objects.
  - Practical effect, fewer journals to post and review while keeping detail.
- Mass Operation Management (MOM)
  - New Apply Student Charge operation to assess fees at scale, for example late fees.
  - Inputs include a population report, charge item, work tags, dates, and either flat or calculated amounts.
  - Scheduling and optional review step to delay or abort runs if not approved.
  - New origination type for tracking charges created by MOM.
- Configuration highlights from the demo
  - Enable grouping of student transaction journal lines in tenant setup to turn on journal consolidation.
  - Opt in to real-time accounts in institutional student financial options and ensure an active charge assessment schedule.
  - Keep refresh buttons if desired; they can coexist with real time for specific periods or sanity checks.
  - Customizable admin help text provides precise guidance; student help text available as of an earlier release.

Real-Time Finance, Real Results: Optimizing Student Billing in Workday

Student

- Reporting enhancements
- New related elements connect student charges to their transaction group, so finance can see all charges included in a consolidated journal.
- Practical guidance for institutions
- Start with a pilot population and monitor processing times, journal counts, and support tickets.
- Use real-time processing during high-volume periods to reduce nightly load and shorten close cycles.
- Standardize work tags and naming to maximize receivable aggregation and simplify reporting.
- Use MOM for repeatable assessments like monthly late fees, with a review step for control.

Workday Student: Creating the Foundation for Flexible Learning

Student

Speakers
Jay Rivituso (Workday)

Why This Session Matters
Higher education is shifting fast, with new student profiles, skills-based hiring, and regulatory changes. Institutions need systems that let students move across programs and calendars without breaking financial aid or billing. This session explains how Workday Student is adding record and program flexibility to reduce manual work and keep data consistent.

What Was Covered
The session opened with the market context, including competition for fewer traditional students, demand for alternatives to degrees, and the need to show clear value. From there, it focused on two areas. First, record flexibility, Workday will automatically switch a student's reporting record when they complete one program and are set to begin another, so downstream financial aid and student finance process against the right record without manual intervention.

Second, program flexibility, Workday is making cross calendar registration and student calendar changes simpler. Institutions can set a policy to map cross calendar registrations by academic period start date or by section start date, and a new business process lets staff override the default per case with security, notifications, and approvals. Students who transition between calendars mid period will be supported, with overlapping period records where needed and tools to decide how to count registration and report to external bodies. The roadmap then looked ahead to a multi release initiative on flexible learning to support more non traditional programs while preserving data integrity across the platform.

Workday Student: Creating the Foundation for Flexible Learning

Student

Key Announcements & Takeaways

- Record flexibility
  - Automatic switch of the reporting record after the expected completion date of the current program, so future term billing and aid align to the next program.
  - Removes manual flips of the reporting record and the risk of billing or aid processing against the wrong record.
- Program flexibility, cross calendar registration
  - New registration assignment policy, choose the default mapping method: academic period start date (current behavior) or section start date.
  - New business process to override the default on a specific registration, with its own security, auditability, notifications, and optional approvals.
  - Practical examples, mapping semester sections back to a student's quarter transcript, even when sections are date shifted within the same term.
- Program flexibility, student calendar changes
  - Allow reporting record or primary program changes at any time, not only on standard period start dates.
  - Overlapping financial aid and student finance period records are supported where calendars do not align.
  - Institution controls how registrations are counted and how activity is reported to NSC and other bodies.
- Guardrails and interoperability
  - Flexibility is added without sacrificing data integrity, academic, financial aid, and student finance stay aligned.
  - Design emphasizes one system of record that actually talks to itself across modules, reducing disjointed workarounds.
- What is already delivered vs what is next
  - Delivered earlier, account flexibility separating student financial from financial aid period records.
  - Coming into production, automatic reporting record switch and the new options for cross calendar and in period changes.

    - Ongoing design partner input to refine mechanics of overlapping periods and reporting behaviors.
- How to apply this now
    - Define the institutional default for cross calendar mapping and publish it.
    - Use the override business process sparingly with clear approval paths, for example registrar initiates, bursar or financial aid reviews.
    - Pilot with common scenarios such as JD MBA or credit plus non credit, and document mapping rules.
    - Align calendars, naming, and reporting policies early to simplify downstream reconciliation.
- Roadmap, flexible learning initiative
    - Multi release investment focused on supporting non traditional programs with greater architectural agility.
    - Customer survey is open to capture priorities and pain points, updates will follow as capabilities roll out.

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- Roadmap, flexible learning initiative
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Elevating the Student Experience Through Optimized Course Search

Student

Speakers

Taylor Luck (Workday)

Why This Session Matters

Course search and registration is where students feel the system most. If it is slow or confusing, support tickets rise and students miss seats. This session shows how Workday is simplifying planning and registering with a new Save Schedule Builder and smarter tools, so institutions can cut friction and improve outcomes.

What Was Covered

The talk started with today's student flow, search reports to find courses and sections, academic plans for long-term planning, and saved schedules for short-term planning before registration opens. The focus then moved to the redesigned Save Schedule Builder, a calendar-first experience that reduces scrolling, shows conflicts clearly, and lets students set grading basis and units up front.

Two demos illustrated common scenarios. Isabella plans around athletics and split terms (Fall 1 and Fall 2), using filters to avoid conflicts and finish a full load across sub-periods. Jake generates a schedule directly from his academic plan, adds preferences (in-person only, days, time windows), blocks work hours, then regenerates to fit everything. The team shared how design partners and early adopters shaped the feature, what shipped in 25R2, what is in preview, and what is next.

Key Announcements & Takeaways

- What is available now
    - 25R2 production enhancements
        - Better filtering by academic period in Academic Plan and Find Course reports.
    - Preview opt-in
        - Foundation of the Save Schedule Builder, create and edit

        - schedules, new calendar view, conflict visibility, grading basis and units selection.
- Save Schedule Builder, how it helps
    - Calendar-first layout reduces mental load compared to tabbed grids.
    - Fast add from Find Courses, Course Sections, or Academic Plan.
    - Filters for sub-periods (for example Fall 1 and Fall 2) to plan split terms cleanly.
    - Conflict checks across sections and periods with clear messages.
    - Set grading basis and units during planning, not at checkout.
- Generate from Academic Plan
    - One-click generate uses planned courses, then applies student preferences.
        - Modality, in-person or online.
        - Preferred days and time windows.
        - Unavailable blocks (for jobs, athletics) with regenerate to refit the schedule.
    - Checkmarks confirm all planned courses are scheduled.
- Feedback in action
    - Design partner group and early adopters tested with real students and drove changes.
    - Students rated the calendar as the biggest improvement for ease and speed.
- Roadmap focus areas
    - Generate flow moving from preview toward release.
    - More on-canvas details and alerts
        - Co-requisite and eligibility warnings.
        - Capacity and closed indicators on calendar entries.
- Implementation guidance for institutions
    - Turn on the preview builder in a non-prod tenant, involve 50 to 100 students, and collect structured feedback.
    - Publish simple rules for split-term planning and period filters so students avoid hidden conflicts.

Workday Rising is returning to Las Vegas in October 2026

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