Workday AI

Product Summary

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Agents

About Workday Agents

Workday AI agents are autonomous assistants that can answer questions and perform multistep actions to enable you to complete complex tasks and workflows. These agents use large language models (LLMs) that analyze data and learn patterns in order to produce recommendations, make decisions, answer questions, or take action either as themselves or on behalf of a human worker.

Workday supports use of these types of agents:

1. Workday-built agents (built by Workday)
2. Custom agents (built by you, in Workday Extend)
3. External agents (also called Self-Built Agents; built by you in an external platform)
4. Partner agents (built by a certified Workday Partner)
5. Sana User agents (built by you, in Sana)

Every agent uses skills, which are the tasks or activities the agent can execute. Each skill consists of:

- Tools, which are the resources the agent may use when executing the skill. For agents that interact with Workday, tools are Workday APIs.
- Resources, which are the type of API that a tool uses. Examples: REST, SOAP, Graph, WQL.

Workday Agent System of Record (ASOR)

ASOR is a centralized framework for Workday agents that enables you to:

- Find, add, register, configure, monitor, and manage your AI agents.
- Leverage a single control center for governance, security, and auditing your agents, reducing administrative overhead.
- View data insights, including usage and performance, to analyze and demonstrate the value and impact of your agents.
- Provides the ability for agents to interact across systems.

You don’t need to purchase additional specific SKUs to use ASOR; it's included in your core Workday subscription.

Workday creates and securely stores the private key client credentials, but you must ensure your security environment supports OAuth 2.0.

You can use these domains to manage your agents:

Domains	Considerations
Agent Compliance	Provides access to reports and data required for agent compliance.
Agent Management Hub	Provides access to the **Agent Management Hub**, which is the centralized hub for viewing and managing all agents.
Manage: Agents	Provides access to tasks for managing agents including configuration, activation, and deactivation in ASOR.

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Domains	Considerations
Reports: Agent Reporting	Provides access to view agent analytics and report data sources and filters for agent level reporting.
Reports: AI Agent Security	Provides access to reports about agent security information.
Setup: Agents	Provides access to setup tasks and activities for agents in ASOR.

Agent Management Hub

You can use the **Agent Management Hub** to manage your Workday-built, custom-built, partner-built, and self-built agents through these phases:

- Register an agent in the **Agent Management Hub** to prepare it for configuration and activation. For self-built agents, you define and register the agent through an API.In order to register agents in Production, you must opt in to theUniversal Main Service Agreement (UMSA).
- Configure your agent to specify which skills are enabled and who can access it.
- Activate your agent to enable users to interact with it based on the security permissions you configured.
- Deactivate your agent when you no longer need it. This hides the agent from users but keeps it accessible in **Agent Management Hub** so you can reactivate it in the future as needed.
- Archive an agent, which removes it from the Agent Registry but retains its history.

The **Agent Registry** section displays your registered agents, along with their status and when an administrator user in Workday last made updates to their configuration. You can click the name of an agent to view the agent's profile, the available skills for the agent, and agent analytics reports.

We recommend that you regularly examine the audit log for agent actions. Workday doesn't delete usage activities from previous weeks during the Sandbox refresh.

Agent Security

As you configure your agents, you can specify who has access to interact with the agent by providing security groups for each delegate execution mode skill. Example: You can specify Employee as Self to make a skill available to an employee who interacts with the agent. As long as a user is part of one of the security groups on one of the skills, they have access to interact with the agent.

Agent interaction security permissions are separate from tool execution permissions. Consider evaluating alignment between the security groups in the **Available To** prompt and the security groups that have permissions for the tools the agent may execute using the **View Security for Agent Skill** report. The agent interaction security groups do not have to be a 1:1 match with the security groups on API policies. In order for the tool execution to succeed, a user must be a member of a security group that's both on the agent skill and on the API security policies.

Ambient execution mode skills don't require interaction access because they take action without human user interaction and operate on a schedule or set initiation.

Agent System User (ASU) accounts enable you to secure and manage your agents in Workday. Workday automatically generates an ASU for your agent after you complete the **Configure Agent** task. You can view your ASU accounts for your agents using the **All AI Agent Accounts** report (secured to the Workday Accounts domain in the System functional area). You can also view AI agent accounts using the **All Workday Accounts** task.

Agent developers can leverage ASUs to interact with Workday data through Agent Gateway. See Agent Security

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Reporting

The **Overview** section of the **Agent Management Hub**provides access to these reports (secured to the *Reports: Agent Reporting* domain):

Report	Considerations
Active Agents	Available for all agents.
Total Agent Sessions Over Time	Only available for Workday-built agents.
Total Agent Sessions	Only available for Workday-built agents.
Total Unique Users	Only available for Workday-built agents.

In the **Analytics** tab of the **Agent Registry** section of the **Agent Management Hub** , you can click the name of an agent to view these agent analytics reports (secured to the *Reports: Agent Reporting* domain and only available for Workday-built agents):

- **Agent Sessions**
- **Skill Interactions**
- **Total Skill Interactions Over Time**
- **Total Unique Users for the Agent**
- **Total Unique Users for the Skills**

The **Unregistered Workday Agents** section displays the **Find Unregistered Workday Agents** report (secured to the *Agent Management Hub* domain), where you can discover the Workday-built agents you're eligible to register.

You can access these reports for agent security, compliance, and auditing:

Report	Considerations
Agent Input and Output Request Details	Secured to the *Agent Compliance* domain and only available for Workday-built agents.
All AI Agent Accounts	Secured to the *Workday Accounts* domain. Enables you to view your ASU accounts for your agents.
Generate Agent Input and Output Report	Secured to the *Agent Compliance* domain and only available for Workday-built agents. Access this report to view all agent accounts in your tenant. On the report, you can click the **Workday Account** related actions to view audit trails.
Input and Output Report For Registered Agents	Secured to the *Agent Compliance* domain and only available for Workday-built agents.
View AI Agent User Audit Trail	Secured to the *Reports: AI Agent Security* domain.
View Security for Agent Skill	Secured to these domains: • *Security Administration* • *Manage: Agents* Displays detailed information about the agent's tools APIs and the respective domain or business process security policies and permissions.

For additional agent reporting, you can use these data sources:

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Data Source	Considerations
All Agent Definitions	Secured to the *Reports: Agent Reporting* domain. Provides fields for reporting on all registered and unregistered agent definitions.
All Agent Registrations	Secured to the *Reports: Agent Reporting* domain. Use in custom reports to analyze agent registrations.
Agent Input and Output Details	Secured to the *Agent Compliance* domain. Use to view your agent input and output interactions for the past 30 days.

You can also leverage these data sources (secured to the *Reports: Agent Reporting* domain) that provide usage analytics data for the past 30 days:

- **Agent Sessions by Day**
- **Agent Sessions by Day**
- **Agent Skill Interactions by Day**
- **Agent Unique Users by Skills**

Set Up Agent System of Record

Prerequisites

Security: *Security Configuration* domain in the System functional area. Required to configure the ASOR security domains.

Context

You can manage your organization's digital workforce using Agent System of Record (ASOR). To set up ASOR in your tenant, you must:

- Enable the ASOR functional area.
- Configure domain security policies for ASOR tasks and reports.

You must set up and configure ASOR in each of your tenants as there's no current method to migrate configurations.

Steps

1. Access the **Maintain Functional Areas** task.
   Select the **Enabled** check box for the Agent System of Record functional area.
   Click **OK** and then **Done**.
2. Access the **Activate Pending Security Policy Changes** task.
   Enter a comment and click **OK**.
   Select the **Confirm** check box and click **OK**.

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3. Access the **Domain Security Policies for Functional Area** report.

   From the **Functional Area** prompt, select *Agent System of Record*.

   Select **Domain Security Policy > Enable** from the related actions menu for these domains:

   - *Agent Compliance*
   - *Agent Management Hub*
   - *Manage: Agents*
   - *Reports: Agent Reporting*
   - *Setup: Agents*

   Repeat this step for the *Reports: AI Agent Security* domain in the System functional area.
4. Access the **Maintain Permissions for Security Group** task.

   Select the *Maintain* operation.

   From the **Source Security Group** prompt, select the security group that you want to grant ASOR agent management access to.

   Note: Currently, you can only configure unconstrained groups on ASOR security policies.

   On the **Domain Security Policy Permissions** tab, provide *View and Modify* permissions for these domain security policies:

   - *Agent Compliance*: Access to reports and data required for agent compliance.
   - *Agent Management Hub*: Access to the **Agent Management Hub** - the centralized hub for viewing and managing all agents.
   - *Manage Agents*: Access to tasks for managing agents including configuration, activation and deactivation in ASOR.
   - *Reports: Agent Reporting*: Access to view agent analytics and report data sources and filters for agent level reporting.
   - *Reports: AI Agent Security*: Access to reports about AI agent security information. Example: the **View AI Agent User Audit Trail** report.
   - *Setup: Agents*: Access to setup tasks and activities for agents in ASOR.
5. Access the **Activate Pending Security Policy Changes** task.

   Enter a comment and click **OK**.

   Select the **Confirm** check box and click **OK**.

Register and Configure Workday-Built Agents

Prerequisites

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

1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.

If the value is:

- *UMSA*, the feature is automatically available. Keep data contributions enabled to ensure full agent functionality. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.

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- *MSA*, your organization must opt in to UMSA and enable this feature through Innovation Services.

UMSA is required for non-Production and Production tenants for Workday-Built agents. UMSA isn't required for non-Production tenants for self-built agents.

For information about how using agents impacts your Flex Credits, see: Workday Flex Credits Community page.

Set Up Agent System of Record.

Context

You can register, configure, activate, and deactivate Workday agents using the **Agent Management Hub**. You can edit previous configurations at any time.

Steps

1. Access the **Agent Management Hub** report.
2. Select the **Unregistered Workday Agent** tab.
3. Click **Register** the agent you want to register.

   You can only register agents in the SKUs obtained by your organization.

   Workday moves the agent to the **Agent Registry** tab.
4. Select the **Agent Registry** tab and then click on the agent name to configure the agent.
5. From the agent's profile view, click **Configure Agent**.
6. In the **Status** column, make each relevant skill available by enabling the toggle slider.
7. For each enabled **Skill**, populate the **Available To** prompt with the security groups that you want to provide access to for that specific skill. The security groups added to the **Available To** prompt for an agent establish the agent's interaction policy.

   Note:

   Workday evaluates both user access to the agent and the user access to the APIs the agent is executing as tools at runtime. Workday recommends that you evaluate alignment between the security groups in the **Available To** prompt and the security groups that have permissions for the tools the agent might execute. Access the **View Security for Agent Skill** report to view which security policies must be configured for a given security group for a tool to function. See the Self-Service Agent FAQ on Workday Community for security troubleshooting information.
8. Click **Activate**.

Result

Employees that have access to the security groups you specified for each skill and the domain or business process security policy associated with the APIs that make up each skill can use the agent. When you activate an agent, the Agent System User (ASU) for the agent also activates automatically.

Authenticate Agents to Agent Gateway

Prerequisites

- Register and activate your agent with Agent System of Record (ASOR) using the agent registration API. See Register External Agents. Note these values:
  - Client ID.
  - Client Secret.
  - Redirect URI for delegate agents.
  - x509 Public Key for ambient agents.

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- Configure External Agents.

Context

All agents must use Agent Gateway to interact with Workday. For the Agent Gateway to route requests to the correct Workday data center, it must know the alias of your tenant. You must provide your tenant alias with all agent API requests, including requests for authentication. Your tenant alias is typically the name of your tenant, and can be found in the URL of your Workday instance: https://wd8.myworkday.com/<tenantalias>/d/home.html.

To direct all relevant API calls to your assigned Agent Gateway endpoint, you must modify your agent's code or configuration.

For more details on authentication, see Configure External Agents.

Steps

1. To request an authorization code, send an HTTPS GET request to the authorization endpoint in Agent Gateway.

   Send this request in your browser and sign in if requested:

   ```
   https://us.agent.workday.com/auth/authorize/<Tenant Alias>?
   client_id=<OAuth_Client_ID>&response_type=code
   ```

   Substitute endpoints based on your region.

   The Agent Gateway will send this request to the Auth Gateway in the data center where your tenant is located, using the Tenant Alias in the request. The Auth Gateway will then redirect you to a Workday login pop-up, to authenticate. After a successful login and consent for the agent to access Workday data, your agent will receive an authorization code.
2. Copy the authorization code value from the response.
3. To request an access token, send a POST request to the token endpoint in Agent Gateway.

   Fill in the Client ID and Client Secret you noted from ASOR, your tenant alias, and the authorization code.

   Substitute endpoints based on your region.

   ```
   POST  https://us.agent.workday.com/auth/oauth2/<Tenant_Alias>/token

   grant_type=authorization_code
   code=<authorization_code>
   client_id=<OAuth_Client_ID>
   client_secret=<OAuth_Client_Secret>
   ```

Result
Your agent receives an access token and is now authorized to interact with Workday through Agent Gateway.

Concept: Workday Agent Gateway

You can use Workday's Agent Gateway to connect your AI agents with Workday's Agent System of Record (ASOR) more easily. It enables your agents to collaborate and communicate information with Workday, providing real-time support and automation within your existing workflow.

Agent Gateway provides a single, unified regional endpoint to centralize and streamline how third-party agents interact with Workday. Agent Gateway provides access to the Workday APIs, including Graph, for all agentic partners, along with access to the Agent Definition Registry API. .

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The Agent Gateway includes:

- All Public REST operations
- All Public SOAP operations
- Workday Graph API
- Workday Query Language (WQL)
- Workday RaaS

- Agent Gateway enables you to:

- Use your agent to work efficiently with future Workday platform updates and security protocols.
- Ensure your agent interacts with Workday in a stable, high-performance environment through built-in rate limiting and performance guardrails.
- Ensure all API calls are authenticated and authorized through Workday's security layer.
- Use a single entry point for all your agent's Workday API interactions.
- Clearly track your agent's API consumption for accurate billing and cost management.

API Requests Through Agent Gateway

All third-party agents interacting with Workday APIs must route their API traffic through Agent Gateway using Agent System User (ASU) security. For more information, see Concept: Agent Security.

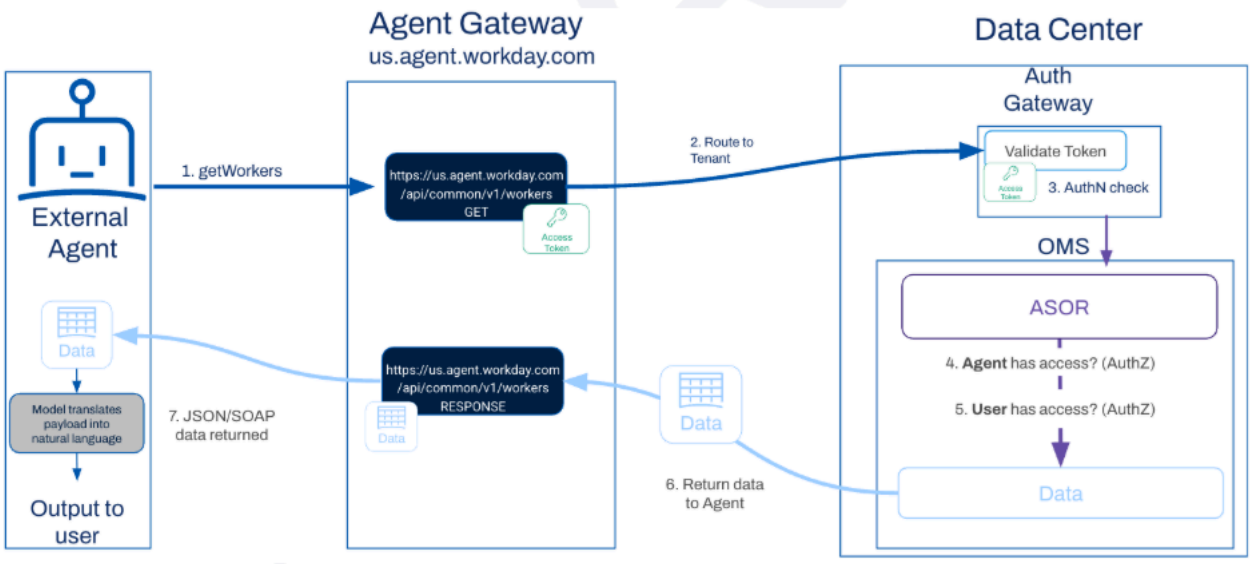

Figure 1: API Requests through Agent Gateway

To route your API traffic through Agent Gateway, you must register your external agents in Workday through Agent System of Record (ASOR) and configure authentication. See Configure External Agents in Workday.

When you active or deactivate an agent in Workday, it might take up to 1 minute for the status change to be reflected in Agent Gateway and MCP Gateway requests.

API Call Requirements

Your agent's API calls must include:

- Gateway Endpoint: us.agent.workday.com. Substitute endpoints based on your region.
- Tenant Alias HTTP header: Provide wd-agent-tenant-alias as an HTTP header in the request. The value must be unique.

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- SOAP calls: The correct endpoint for SOAP calls is

  ```
  https://us.agent.workday.com/soap/{version}/{serviceName}
  ```

  Substitute endpoints based on your region.

Sample API request for US region:

```
GET https://us.agent.workday.com/api/common/v1/workers
```

Sample HTTP Header:

```
wd-agent-tenant-alias: stark-industries
```

OAuth 2.0 Authentication

If your agent platform supports the OAuth 2.0 standard, it should support the standard OAuth 2.0 Authorization Code Grant authentication flow.

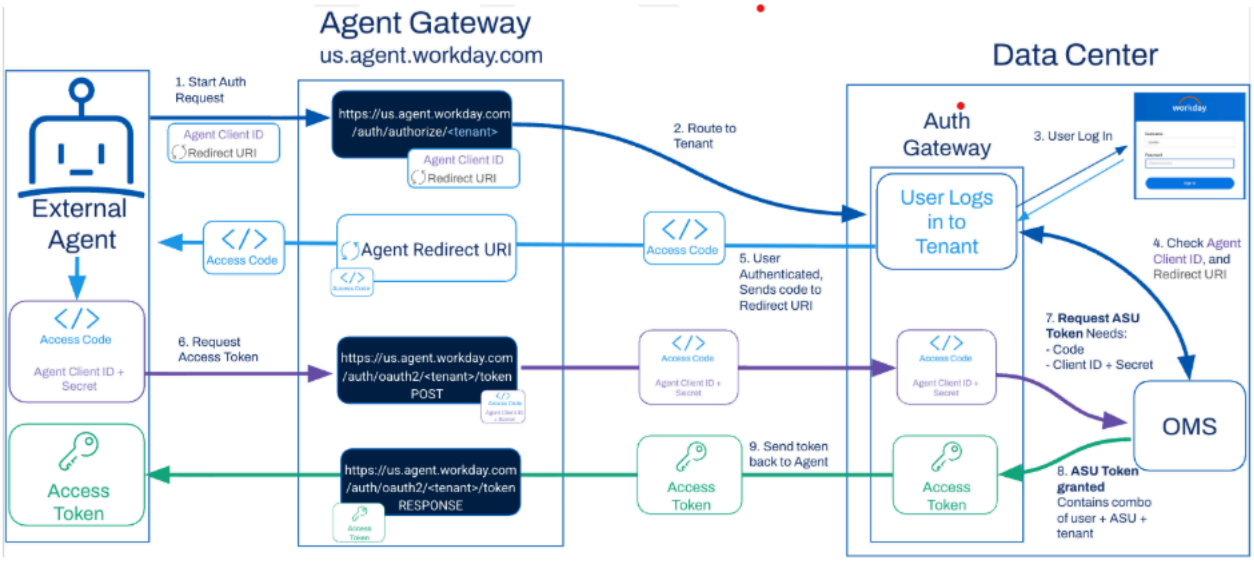

Figure 2: OAuth 2.0 Authentication

Regional Availability of Agent Gateway

Agent Gateway is available in multiple regions. Use these endpoints based on the Workday data center region that hosts your tenant:

Region	Public Regional Endpoint
US	https://us.agent.workday.com
EU	https://eu.agent.workday.com
UK	https://uk.agent.workday.com
CAN	https://ca.agent.workday.com
AU	https://au.agent.workday.com
SIN	https://sg.agent.workday.com
IND	https://in.agent.workday.com

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Region	Public Regional Endpoint
JPN	https://jp.agent.workday.com

Note: Changing regions resets your agent analytics data in **Agent Management Hub**. To preserve your agent analytics data in **Agent Management Hub**, we recommend that you avoid changing regions when possible.

View Analytics for Agents

Prerequisites

Set Up Agent System of Record

Security: *View: Agent Analytics Hub* domain in the Agent System of Record functional area

Context

Agent Analytics Hub provides you with key insights into your organization's agent usage, enabling you to make informed business decisions.

Steps

1. Access the **Agent Analytics Hub** report.
2. On the report, view insights related to:
    - **Agent Demographics**: Including data for active, inactive, registered and unregistered agents.
    - **Agent Usage**: Including data related to total conversations and monthly active users.
    - **Agent Cost**: Including data from the Platform Consumption Console related to agent consumption (secured to the Management Dashboard: Platform Consumption Console domain in the System functional area).

Workday-Built Agents

Workday-Built Agents

Agent	Description	AI Fact Sheet
Adoption Agent	You can register, configure, and activate the Adoption Agent in Workday in your Preview tenant using the **Agent Management Hub** to use the Release Impact Analysis skill.	Workday AI Fact Sheet: Adoption Agent
BP Optimize Agent	The BP Optimize Agent is an AI-powered assistant that helps you improve the efficiency, effectiveness, and overall performance of your business processes within Workday. The agent analyzes your current processes, identifies areas for improvement, and provides	Workday AI Fact Sheet: BP Optimize Agent

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Agent	Description	AI Fact Sheet
	actionable recommendations with step-by-step guidance.	
Case Agent	The Case Agent is intended to enhance the HR service delivery experience for case owners and case solvers in Workday by assisting and automating key steps within the HR service delivery process. It can suggest a case type to employees during case creation, automatically assign cases to members of a service team, and support case solvers by summarizing a case conversation.	Workday AI Fact Sheet: Case Agent
Contingent Sourcing Agent	The Contingent Sourcing Agent is an AI agent in Workday VNDLY that enables your program to efficiently engage top talent. It provides applicant grades on jobs and surfaces previous applicants from your Workday VNDLY talent pool who align with the criteria you provide for new jobs.	Workday AI Fact Sheet: Contingent Sourcing Agent
Core Reporting Agent	The Core Reporting Agent is a conversational AI agent that enables users to perform reporting actions in Workday. You can use the agent to analyze and explore data to answer specific questions about enabled reports, find and open other Workday reports and tasks when your request goes beyond your current report, and summarize report outputs to generate concise, easy-to-read overviews.	Workday AI Fact Sheet: Core Reporting Agent
Decision Intelligence	Decision Intelligence (DI) enables analysts to use AI to investigate data, explore what-if scenarios, and submit changes to Adaptive Planning through existing security and approval chains. DI uses your existing chart of accounts, consolidation hierarchy, organizational structure, and security context. You can analyze financial data without exporting information, setting	Workday AI Fact Sheet: Decision Intelligence

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Agent	Description	AI Fact Sheet
	up external data connectors, or engineering prompts.	
Deployment Agent	The Workday Deployment Agent is an AI-powered conversational assistant. It leverages Large Language Models (LLMs) and a retrieval-augmented generation (RAG) framework to provide instant guidance. The primary purpose of the agent is to equip Workday implementers and customer administrators with implementation knowledge and the ability to inspect in-tenant configuration data while working in these non-Production tenants: • Implementation • Preview • Sandbox • Customer Central (connected to non-Production tenants)	Workday AI Fact Sheet: Deployment Agent
Financial Audit Agent	The Financial Audit agent provides accountants an efficient, automated, and accurate way to provide auditors with high volumes of audit sample requests within the procure-to-pay lifecycle.	Workday AI Fact Sheet: Financial Audit Agent
Payroll Agent	The Payroll Agent is an AI-powered conversational assistant designed to assist with Workday Payroll.	Workday AI Fact Sheet: Payroll Agent
Planning Agent	The Planning Agent is an intelligent, conversational AI assistant that integrates directly into Adaptive Planning using Ask Workday for Adaptive Planning (Ask Workday). Acting as an on-demand digital analyst, it empowers FP&A professionals, CFOs, and operational managers to interact with complex multi-dimensional models using natural language.	Workday AI Fact Sheet: Planning Agent
Revenue Contract Agent	The Revenue Contract Agent is an AI agent that supports the creation of customer contracts from uploaded documents and	Workday AI Fact Sheet: Revenue Contract Agent

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Agent	Description	AI Fact Sheet
	provides insights into those contracts.	
Self-Service Agent	The Self-Service Agent is a conversational AI agent that retrieves and summarizes broad self-service data and takes action on common interactions, such as: • Updating personal information and requesting time off. • Managing organizational goals and viewing team learning statuses. • Viewing organization policy information from knowledge articles stored in Workday.	Workday AI Fact Sheet: Self-Service Agent
Travel Agent	The Travel Agent is a conversational AI agent that enables you to search, book, and modify flights, hotels, and ground transportation.	Workday AI Fact Sheet: Travel Agent
Talent Sentiment Agent	Analyzes the emotional tone, themes, and specific pain points of employee survey scores and comments from the current survey round to generate ranked insight cards. You can start a conversation with the agent to ask: • Why it generated a specific insight. • Request deeper analysis on trends • Understand insight rankings.	Workday AI Fact Sheet: Talent Sentiment Agent

Adoption Agent

Set Up Adoption Agent

Prerequisites

Note: To register and use agents in the Agent System of Record fully in your tenants, you must opt in to the Universal Main Service Agreement (UMSA). UMSA is required for non-Production and Production tenants for Workday-Built agents.

1. Select your profile avatar on Workday Community.
2. Select **Profile**.

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3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value. If the value is *MSA*, you must opt in to the UMSA.

- Set Up Agent System of Record.
- Set Up Security for Adoption Planning Hub.
- Security: The *Reports: AI Agent Security* domain in the System functional area and these domains in the Agent System of Record functional area.

Context

You can register, configure, and activate the Adoption Agent in Workday in your Preview tenant using the **Agent Management Hub** to use the Release Impact Analysis skill. For more information on the Release Impact Analysis skill, see Release Impact Analysis .

Note: The Adoption Agent is not available in your Production tenant because the Release Impact Analysis skill can only evaluate automatically available features that have not yet moved to Production.

Note: The Adoption Agent is not available to US Federal customers or customers using the EU Sovereign Cloud SKU.

Steps

1. Access the **Agent Management Hub**.
2. Select the **Unregistered Workday Agents** tab.
3. Click **Register** for the Adoption Agent.

   You can only register agents in the products your organization has access to.

   Workday moves the Adoption Agent to the **Agent Registry** tab.
4. Select the **Agent Registry** tab and click the Adoption Agent name.
5. Click **Configure Agent**.
6. In the **Status** column, enable the Release Impact Analysis skill.
7. From the **Available To** prompt, select the security groups that require access to the Release Impact Analysis skill.

   Note: Workday evaluates both user access to the agent and to the APIs the agent is executing as tools at runtime. Workday recommends that you evaluate alignment between the security groups in the **Available To** prompt and the security groups that have permissions for the tools the agent might execute.
8. Click **Activate**.

Result

Workday enables the Release Impact Analysis skill in your Preview tenant. Users in the selected security groups can now access the **Release Impact Analysis** task in the **Adoption Planning** report.

Note: Workers with access to the **Adoption Planning Hub** can view release impact analysis reports without having access to the Adoption Agent.

Related Information
Examples
2027R1 Feature Release Note: Adoption Agent
Workday AI Fact Sheet: Adoption Agent

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Generate Impact Analysis Reports

Prerequisites

- Set up the Adoption Agent. See Set Up Adoption Agent.
- Security: *Adoption Planning* domain in the Adoption functional area.

Context

In your Preview tenant, the Adoption Agent uses the Release Impact Analysis skill and the **What's New in Workday** report to estimate the impact of upcoming automatically available features based on your enabled functional areas and tenant usage.

You can generate release impact analysis reports for functional areas where:

- You have appropriate security access.
- There is at least 1 automatically available feature.

You can also generate adoption items directly from the release impact analysis reports.

Note: The Adoption Agent might not return accurate results when accessed through a proxy session.

Steps

1. Access the **Adoption Planning** report.
2. Click **Generate Impact Analysis**.
3. Select a Workday release and functional areas.

   The **Select Functional Area** prompt doesn't include functional areas that doesn't have release notes for the selected release.

   The **Release Notes in Preview** field displays the number of release notes to be analyzed.
4. Click **Generate Impact Report**.

   Workday analyzes the first 10 release notes.
5. Click **Refresh** to view the output.

   The Adoption Agent might not complete the analysis in a single refresh. When analysis is complete on the first 10 release notes, the Adoption Agent begins analyzing the next 10 release notes.

Result

Workday assigns 1 of these statuses in the **Generated Impact Analysis** column for each item:

- *Access Blocked*
- *Configuration Required*
- *No Impact*
- *Review Only*
- *Testing Recommended*
- *Unknown Impact*

Workday also provides customized guidance on the impact of the What's New item on your tenant, available in the **Impact Summary** column. This content is generated by AI. Review content before use. See Release Impact Analysis.

Note: Workers with access to the **Adoption Planning Hub** can view release impact analysis reports without having access to the Adoption Agent.

Next Steps

From the **Adoption Planning** report, you can review and export all impact analysis reports by selecting **Features Releases > Impact Analysis Reports**.

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Note: If you've customized the Adoption Planning Hub, you may need to add the **Feature Releases** page. See Customize Hub Navigation.

You can create adoption items from a release analysis report. See Create Adoption Items from Impact Analysis Reports.

Related Information
Concepts
Release Impact Analysis
Examples
2027R1 Feature Release Note: Adoption Agent

Create Adoption Items from Impact Analysis Reports

Prerequisites
Set Up Adoption Agent.

Context

You can create adoption items from the impact analysis reports the Adoption Agent generates with the Release Impact Analysis skill. Creating adoption items from your release impact reports enables you to track your team's uptake of new features and enhancements in the **Adoption Planning Hub**. See Setup Considerations: Adoption Planning Hub.

Steps

1. Generate Impact Analysis Reports.
2. Select the release notes that you want to link to adoption items.
3. Complete the **Create Adoption Item from Release Impact Report** prompt:

Option	Description
Status	Statuses identify workflows for deployment. To add items to your backlog, assign 1 of these statuses: • *In Backlog* • *In Review* • *Prioritized* To add items to your roadmap, assign 1 of these statuses: • *Deferred* • *On Roadmap* Using the **Maintain Adoption Item Statuses** task, you can: • Create your own custom statuses. • Configure how adoption items are displayed in Adoption Planning based on status.
Assigned To	If you don't select an assignee, Workday assigns the adoption item to you.

4. Click **OK** and **Done**.

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Result

Workday creates the adoption items and shares your impact analysis report in the **Comment** column.

Related Information
Examples
2027R1 Feature Release Note: Adoption Agent

Release Impact Analysis

The Adoption Agent uses the Release Impact Analysis skill and the **What's New in Workday** report to compare automatically available features against your tenant usage data to recommend suggested actions such as testing or review. The agent then delivers an impact analysis report that helps you identify specific reports, fields, and processes that might require review as a result of a release.

Impact Analysis Reports

The Adoption Agent assigns 1 of these statuses to the release note in the **Generated Impact Analysis** column of the impact analysis report:

Generated Impact Analysis Status	Description
Analysis Blocked	The Adoption Agent relies on your security access. The analysis excludes items you cannot view, so the test plan is incomplete.
Configuration Required	Workday recommends that you test and configure this feature, as it likely affects your tenant.
No Impact	You don't use the functionality that's changing.Workday doesn't expect this feature to affect your tenant.
Review Only	The changing functionality is relevant to your tenant, but likely doesn't affect your existing processes or end users. Workday recommends that you review the feature for potential action.
Testing Recommended	Workday expects this feature can impact your existing processes or end users. You can test this functionality using the test plan in the**More Details** column.
Unknown Impact	Workday can't determine the impact on your tenant. See the **Impact Summary** column for more details.

The report also includes these columns:

Column	Description
Feature Summary	Summarizes the release note.
Impact Summary	Displays the Adoption Agent's impact analysis of the feature on your tenant, based on your historic usage.
Target User	Displays the intended feature user.
More Details	Displays a test plan for verifying feature functionality, and a list of actions performed by the Adoption Agent in its analysis.

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Column	Description
Release Note	Provides a link to the release note on the Release Center. Release notes on the Release Center can include additional information, such as change logs and videos.
Release Note Corrected Date	The date that the release note was last corrected. Example: We correct the name of a new task.
Updated Date	The date that the release note was last updated. Example: We added a video or documented an additional feature enhancement.
Feedback on Report	You can leave feedback on an impact analysis report by clicking the thumbs up or thumbs down icon.

Security Access

The Adoption Agent relies on the worker's security access to analyze the impact of feature changes to your tenant. When you access the Adoption Agent through a proxy session,it might not return accurate results.

Note: Workers with access to the **Adoption Planning Hub** can view release impact analysis reports without having access to the Adoption Agent.

Related Information
Tasks
Generate Impact Analysis Reports
Examples
2027R1 Feature Release Note: Adoption Agent
Workday AI Fact Sheet: Adoption Agent

Troubleshooting: Adoption Agent Not Available

The Adoption Agent doesn't display on the **Agent Management Hub**. When you attempt to set up the Adoption Agent in your Production or Implementation tenants, the agent doesn't display in the **Agent Registry** or **Unregistered Workday Agents** tabs.

Cause: The Adoption Agent and the Release Impact Analysis skill are only available in your Preview tenant.

Solution: Configure the Adoption Agent in your Preview tenant. See Set Up Adoption Agent .

BP Optimize Agent

About BP Optimize Agent

The BP Optimize Agent is an AI-powered assistant that helps you improve the efficiency, effectiveness, and overall performance of your business processes within Workday. The agent analyzes your current processes, identifies areas for improvement, and provides recommendations with step-by-step guidance.

The BP Optimize Agent uses:

- The details of configured business processes and their corresponding steps to analyze execution times and identify anomalous patterns.
- Tenant-wide execution data to generate aggregated averages for benchmarking.
- Proprietary system data to determine benchmark groups and data.

Note: To avoid skewing metrics, the BP Optimize Agent excludes data from:

- EIBs.

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- Web services.
- Integration loads.
- Transactions that completed immediately (duration = 0).

The agent only considers business process transactions that occur within Workday.

Skills

The BP Optimize Agent uses the Process Improvement skill, which enables you to:

- Gain insights into business processes, locate bottlenecks, and identify root causes.
- Compare business process performance against benchmarks across industries, regions, and company sizes.
- Get tailored optimization recommendations for your unique business process usage and configuration.

For details, see Concept: BP Optimize Process Improvement Skill.

Security Considerations

BP Optimize Agent users must have Modify permissions on 1 of these domains in the System functional area:

- *Business Process Administration*
- *BP Optimize Agent*

The BP Optimize Agent displays Personally Identifiable Information (PII) data only when displaying the **Created By** and **Last Modified By** users. You can view this information from the **BP Optimize Agent** dashboard and the **Overview** section of the **Trends and Anomalies** page when you click a business process on the bar chart or line chart view or click **Inspect** on the business process modal view.

Your organization's individual benchmarking data is only visible to members of your organization. To prevent the identification of any single customer, Workday only generates benchmark data when a minimum number of customers meet the defined criteria.

Agent Deactivation and Data Purge

To help you manage your data securely, Workday handles your data during deactivation and reactivation based on these rules:

- Automatic Data Purge: If you deactivate the agent or the Process Improvement skill, Workday automatically deletes your tenanted data, agent configurations, and recommendations 21 days after deactivation.
- Reactivation Within 21 Days: When you reactivate the agent before the 21-day threshold, Workday restores your previous settings and automatically analyzes data for any missed periods. This analysis might consume Flex Credits if it includes new data generated while the agent was inactive.
- Reactivation After 21 Days: When you reactivate the agent after the 21-day threshold, your previous data is permanently deleted. You must configure the agent again as a new setup, which consumes Flex Credits.

To avoid consuming additional Flex Credits to reconfigure the agent and reanalyze data that your organization previously processed, we recommend adjusting your business process type scope to keep the agent active instead of deactivating it.

Agent Scope and Limitations

- Limit insights to events that start and complete within the selected time period. The agent excludes events that start in one period but complete in a subsequent period.
- Generate benchmarking insights only when the minimum required industry peer cohort has enough transactions for that business process in the same time period.

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- Consider only completed events with a status of *Successfully Completed*, *Rescinded*, *Canceled*, or *Process Terminated*. The agent excludes in-progress events.
- The agent evaluates business process event data using a rolling 18-month retention window. Workday excludes insights and recommendations that were generated outside of this 18-month period.
- Your tenant must be in the U.S., EU, UK, Canada, Australia, Singapore, India, or Japan and average fewer than 2 million transactions per month.
- The agent only supports English.

Set Up BP Optimize Agent

Prerequisites

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

1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.

If the value is:

- *UMSA*, the feature is automatically available. Keep data contributions enabled to ensure full agent functionality. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, your organization must opt in to UMSA and enable this feature through Innovation Services.

UMSA is required for non-Production and Production tenants for Workday-Built agents. UMSA isn't required for non-Production tenants for self-built agents.

For information about how using agents impacts your Flex Credits, see: Workday Flex Credits Community page.

You must register and activate the BP Optimize Agent in production before you can use it in your sandbox tenant. After you activate the agent in your production tenant, allow up to 24 hours for the system to process the changes before you try to activate the agent in your sandbox.

- Set Up Agent System of Record.
- Security: These domains in the System functional area:
    - *Reports: AI Agent Security*
    - *Business Process Administrator*
    - *BP Optimize Agent*. This domain inherits security from the *Business Process Administrator* domain. To customize access for your organization, you can override the inheritance and use the *BP Optimize Agent* domain.
- (Optional) The BP Optimize Agent includes an optional ML Data Contribution feature called BP Optimize Agent, for UMSA customers. This feature grants Workday access to agent traces, which are generated based on user prompts within the Workday agent chat. It's enabled by default for organizations with UMSA enabled. However, you can manually opt out.

Context

You can register, configure, and activate the BP Optimize agent in Workday using the **Agent Management Hub**.

Review these current requirements and limitations before you set up the BP Optimize Agent:

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- To use the agent, your tenant must be located in the US, EU, UK, Canada, Australia, Singapore, India, or Japan and generate 2 million or fewer transactions per month.
- You can use the agent in Production and Sandbox tenants. To use the agent in a Sandbox tenant, you must first activate it in Production.
- During setup, you must configure the agent by selecting your business process types and assigning a lookback period to each. You can change your selections and lookback periods later using the **Reconfigure** task. Note that these settings dictate your analysis scope and affect your Flex Credit consumption.
- A lookback period is the historical timeframe of transaction data (No Historical Data, 1, 3, or 6 months) that the agent analyzes for a specific business process type to establish performance baselines and generate recommendations.
- The BP Optimize Agent only supports English.
- The agent excludes any step configured after the *Completion* step. It considers a business process complete even if the workflow progresses beyond this step.
- The agent evaluates business process event data using a rolling 18-month retention window. Insights and recommendations that were generated outside of this 18-month period are automatically excluded.

Steps

1. Access the **Agent Management Hub** report.
2. Select the **Unregistered Workday Agent** tab.
3. Click **Register** for the BP Optimize Agent.

   You can only register agents in the products your organization has access to.

   Workday moves the BP Optimize Agent to the **Agent Registry** tab.
4. Select the **Agent Registry** tab and then click the *BP Optimize Agent* name to configure the agent.
5. Click **Configure Agent**.
6. From the **Additional Configuration** column, click the Configure BP Optimize Agent link to configure your analysis scope and select your **Lookback Periods** and **Business Process Types**.

   Note: As you make your selections, the configuration summary page displays dynamic **Estimated Initial Flex Credits** and **Estimated Flex Credits for Subsequent Months** to help you budget. Carefully review your lookback period selection because you currently can't change it after you submit.
7. From the **Status** column, activate the Process Improvement skill.
8. From the **Available To** prompt on the **Process Improvement** skill row, in the System functional area, select either:

   - The *Business Process Administrator* domain.
   - The *BP Optimize Agent* domain if you have customized it.

   The security groups that you select in the **Available To** prompt must also have permissions to the domain or business process security policies that secure the agents. You can use the **View Security for Agent Skill** report to assist with your agent configurations.
9. Click **OK**.
10. From the **Agent Registry** tab, click the **BP Optimize Agent** and click **Activate Agent**.
11. Select the **Confirm** check box and then click **OK**.

Result

After data ingestion completes, which can take up to 48 hours, workers in the *Business Process Administrator* security group can access the BP Optimize Agent from the dashboard and from the Workday agent chat bubble icon to:

- Analyze and visualize business process performance metrics and execution trends.

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- Compare your company’s performance against peer benchmarks for industry, region, and company size.
- Identify bottlenecks, anomalous execution patterns, and their root causes.
- Get tailored, actionable recommendations to optimize your business processes.

Users with access to Sana for Workday can also query the BP Optimize Agent in Sana.

Note:

- Always review and verify the accuracy of AI-generated insights and recommendations before making configuration changes to your business processes.
- When you have more than 1 agent configured, you might need to access the agent chat and select the BP Optimize Agent from the agent menu.
- After your initial onboarding, Workday ingests data automatically on the first day of each month. The agent processes the previous month's historical event data so those new insights and recommendations become available. This monthly processing of the previous month's business process events consumes Flex Credits.

Next Steps

To update your business process types or lookback periods after your initial setup, you can use the **Reconfigure BP Optimize Agent** task in the Agent System of Record (ASOR). When you reconfigure the agent:

- Business process type and lookback period updates take effect on the first day of the next month. To ensure that Workday successfully registers your changes in time for the new month, we recommend submitting your updates at least one day before the last calendar day of the current month.
- BP Optimize only analyzes data from the immediately prior month when you add new business process types. The agent doesn't apply the historical lookback period you selected during your initial activation.
- The configuration summary page dynamically displays an estimated monthly difference to help you budget your Flex Credit consumption. If you reduce your business process type selections, this estimate can be a negative number, which indicates a decrease in your expected ongoing monthly consumption. Workday rounds the estimated monthly difference up to the nearest 100.

If you no longer want to use the BP Optimize Agent, you can deactivate the Process Improvement skill from the **Agent Management Hub**. When you deactivate the agent or skill, Workday initiates these actions:

- Automatic Data Purge: Workday automatically deletes your tenanted data, including agent configurations in ASOR and business process recommendations, 21 days after deactivation. We do not purge your billing data.
- Reactivation Within 21 Days: When you reactivate the agent before the 21-day threshold, Workday restores your previous settings and insights. We automatically analyze your data for any missed periods during the deactivation. This analysis might consume Flex Credits if it includes new data generated while the agent was inactive.
- Reactivation After 21 Days: When you reactivate the agent after the 21-day threshold, your previous data is permanently deleted. You must configure the agent again as a new setup, which consumes Flex Credits.

Note:

- To avoid consuming additional Flex Credits to reconfigure the agent and reanalyze data that your organization previously processed, we recommend adjusting your business process type scope to keep the agent active instead of deactivating it.
- To prevent Flex Credit consumption for the upcoming month, we recommend deactivating the agent at least 3 days before the last day of the current month. When the agent remains active on the first day of the new month, automatic data ingestion begins and consumes Flex Credits for that month.

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Related Information
Examples
Feature Release Note: Agent Orchestration in Sana for Workday

BP Optimize Process Improvement Skill

Overview

The Process Improvement skill of the BP Optimize Agent enables you to:

- Analyze business process data.
- Visualize metrics data.
- BP Optimize Process Improvement Skill
- Compare with benchmark data.
- Review Benchmarking Insights.
- Observe anomalous trends.
- Identify anomalies and root causes.
- Generate optimization recommendations.
- Implement optimization recommendations.
- Ask questions about business process optimization.

The BP Optimize Agent uses the Process Improvement skill to help you analyze the performance of a business process. You can view this information on the **BP Optimize Agent** report to:

- Analyze the performance of a specific business process, select it on the chart and click **Inspect**.
- Adjust benchmark data by clicking the filter icon and scrolling down to the **Industry Benchmarking** section of the filter panel.
- Ask questions using natural language by clicking the Workday agent chat bubble icon and selecting the **BP Optimize Agent**. If you have access to Sana for Workday, you can also query the agent in Sana.

Analyze Business Process Data

The Process Improvement skill analyzes the execution details of configured business processes and their corresponding steps.

By default, the **BP Optimize Agent** report displays:

- A tab for each of your company's licensed product areas. Examples: Extend, Spend, Talent, Workforce. The default tab is **Workforce**.
- The time period consisting of the last completed quarter of the standard calendar year. The agent uses the calendar year to determine quarters. Example: In April 2026, the last completed quarter is Q1 2026, which is January to March of 2026.
- A bar chart, table, and line graph illustrating the business process details for the time period. , which shows the percentage of events that are sent back.
- The business process types associated with the top 5 business process definitions that took the longest to complete in the specified time period.

  The active business process definitions for the selected business process types.

You can select the Filter icon in the report to:

- Modify the time period for the graphs.
- Select business process types to display on the graphs.
- Select active business process definitions for the business process types.
- Modify the displayed metrics on the graph to view either the average time to completion or the percent of events with send backs.

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Visualize Metrics Data

The Process Improvement skill enables the agent to display business process performance data for successfully completed, rescinded, cancelled, and terminated events in these formats:

- Bar Chart: Displays the average completion time for business process definitions that meet the filter criteria. You can click on a bar to inspect the business process execution details.

  Note: When benchmark data is available, a line across the bar chart represents the benchmark data. See Compare with Benchmark Data.
- Table: Displays execution metrics, including average completion time and the number of send backs. The metrics include baseline tenant values and, when available, benchmark values. You can click the Expand funnel icon to change the display for these metrics:
  - Average
  - Maximum
  - Minimum
  - The p50, or median. This is the value below which 50 percent of the observed metric values lie for the tenant or the benchmark in the selected time period. Example: 50 percent of events are completed in 20 hours, while the other 50 percent take longer.
  - The p95. This is the value below which 95 percent of the observed metric values lie for the tenant or the benchmark in the selected time period. Example: 95 percent of events are completed in 37 hours, while the remaining 5 percent take longer.
- Line chart: Displays the trend of business process performance over a specified period. You can click each point to see more business process execution details. When configuration-change data exists for the time range you're viewing, Workday displays the **Configuration Changes Impact Analysis** section under the line chart. See Evaluate Configuration Changes.

You can export bar charts and line charts as PDF or image files by accessing the related actions menu of the chart and selecting either **Download as PDF** or **Download as PNG**.

You can also export tables to CSV and Excel formats. The exports include all the available values. Examples: Average, maximum, p95.)

Evaluate Configuration Changes

You can evaluate how configuration changes affect your business process performance, including whether modifications had a positive or negative impact. By providing data on duration, send backs, and reassignments, this analysis helps you decide which configuration changes to keep and which ones to adjust.

Workday displays the **Configuration Changes Impact Analysis** section under the line chart in the Line/Measure chart view when configuration-change data exists for the time range you're viewing.

The **Configuration Changes Impact Analysis** section:

- Displays impact analysis at a quarterly level, generated after each completed quarter.
- Highlights up to 5 key configuration changes per selected business process definition.
- Enables you to review change details, including the readable name for the updated configuration, the date the change was made, the original and updated values, the events analyzed, and the impact on the business process. Change details can include modifications to step counts. Example: Steps increased from 20 to 23.

Compare with Benchmark Data

When benchmark data is available, the bar chart displays a benchmark line across the business process bars. Workday displays the benchmark criteria as a black dot when there's only 1 business process definition that meets the criteria. The benchmark data lines enable you to compare your company's business process performance with other companies in the same industry, region, and company size. The **Table** view also includes benchmark metrics.

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The BP Optimize Agent generates benchmark data by:

- Averaging execution data across organizations that share these criteria: Industry, region, and enterprise size.
- Determining a tenant's benchmark group by referencing the tenant's details within Workday records.

The BP Optimize Agent doesn't display benchmark data when there aren't enough tenant peer cohorts in the tenant's benchmarking peer cohort to meet the minimum configured threshold.

Review Benchmarking Insights

You can inspect a business process by clicking on an event in a chart or table and then clicking **Inspect**.

While inspecting a business process on the **Benchmarking** tab, Workday:

- Highlights areas where your business process performance falls behind or exceeds your industry, region, and company size benchmarks.
- Identifies up to 5 specific steps that took the longest to complete.
- Compares configuration differences between your tenant and your best-performing peers at both the definition level and across the 5 steps to generate optimization recommendations. The agent doesn't display comparison data when your benchmarking peer cohort lacks sufficient peer cohorts.
- Evaluates only the quarter that you selected.
- Includes events with a status of *Successfully Completed*, *Rescinded*, *Canceled*, or *Process Terminated*.
- Excludes any step configured after the *Completion* step. The agent considers a business process complete even if the workflow progresses beyond this step.

Observe Anomalous Trends

When you select a business process on a chart or table and click **Inspect**, the inspect page opens in a separate tab where you can view deeper trend insights that help you identify anomalies, patterns, or changes in business process performance over time.

The **Trends** tab:

- Displays how a specific business process performed in the selected time period compared to the preceding time period. Example: When Q1 2025 is the selected time period, the agent compares the business process performance in the tenant between Q1 2026 and Q4 2025.
- Includes only events that are initiated and complete within the selected time period. The agent excludes events that start in one period but complete in a subsequent period. Example: When Q1 2026 is the selected time period, the agent compares only events initiated and completed in Q1 2026 with events initiated and completed in Q4 2025. It excludes events started in Q1 2026 but completed in Q2 2026.
- Includes events with a status of *Successfully Completed* , *Rescinded*, *Canceled*, or *Process Terminated*.
- Excludes any step configured after the *Completion* step. The agent considers a business process complete even when the workflow progresses beyond this step.
- Displays optimization recommendations when business process performance trends slower. It does not display recommendations when a business process trends faster than in the previous time period.
- Identifies root causes for the trend.

  The agent identifies significant changes in step-level executions between the two time periods and determines which steps had the greatest impact on the business process performance change. It also calculates the percentage contribution of each identified step to indicate its relative impact.

Identify Anomalies and Root Causes

When you inspect a business process, you can view anomalous execution patterns, which identify problematic business processes that need to be resolved or optimized.

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The **Anomalies** section:

- Highlights any unusual business process executions, and describes how a specific business process performed within the specified time period.
- Includes events with a status of *Successfully Completed*, *Rescinded*, *Canceled*, or *Process Terminated*.
- Includes events that complete within the selected time period, even when the events started prior to the selected time period. Example: When Q1 2026 is the selected time period, the agent identifies anomalies on business processes completed in Q1 2026, including completed events that started before Q1 2026.
- Excludes any step configured after the *Completion* step. The agent considers a business process complete even when the workflow progresses beyond this step.
- Lists the top root causes and key contributing steps for the anomalous transactions.

  The agent analyzes events identified as anomalous in the selected time period and identifies the steps that had the greatest negative impact on the business process performance.

  The agent displays:

  - The metric measured for the root cause, such as duration, send backs, or reassignment.
  - Specific steps that contribute to the anomaly, including the count of events in which that step is detected as anomalous, the average time taken by that step in those events, and the total occurrences of that anomaly (such as sent backs or reassignment).

Generate Optimization Recommendations

The BP Optimize Agent provides optimization recommendations for trend insights and anomalous execution patterns. Note that the agent displays the **Trends** section only when a business process trends slower than in the previous time period.

When you review the insights in the **Trends and Anomalies** sections, the agent:

- Dynamically generates tailored recommendations in real time instead of relying on pre-computed data. This generation process can take up to 1 minute.
- Formulates actionable advice to assist you in resolving and optimizing problematic business process steps. The BP Optimize Agent language model uses the Workday Administrator Guide, Workday Community, and other expert Workday knowledge sources.
- Provides reference links under **Learn More**, when available.

If recommendations fail to generate and you get an error message, try to generate the recommendations again.

Implement Optimization Recommendations

Although the BP Optimize Agent tailors the recommendations according to the reported anomalies, always carefully review the generated optimization recommendations and determine how they fit your organization and specific business processes. There might be optimization opportunities beyond the provided recommendations.

After you implement a recommendation or make a configuration change to a business process, you can:

- View the line chart on the **BP Optimize Agent** dashboard. The line chart enables you to analyze the business process performance and identify any performance changes.
- Use the BP Optimize Agent to review the latest trends, anomaly insights and benchmarks. By iteratively using the agent, you can identify further optimization opportunities and recommendations.

Concept: BP Optimize Agent Flex Credit Estimator

The BP Optimize Agent provides immediate, data-driven Flex Credit estimates to help you manage your budget before you activate or reconfigure the agent.

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Workday calculates these Flex Credit projections using a 12-month average of your tenant's actual historical event volumes for your selected business process types. We multiply that average by your selected lookback periods and round up to the nearest 100 to provide these estimates:

- Estimated Initial Flex Credits: The immediate, one-time consumption for your initial activation (or a new setup following a deactivation purge). This covers the cost of analyzing your historical data based on your selected lookback periods and business process types. Note that this estimate displays as 0 if a waiver applies to your first-time activation.
- Estimated Flex Credits for Subsequent Months (Recurring): The expected ongoing monthly consumption following your activation. On the first of each month, the BP Optimize Agent brings in your previous month's business process events to analyze and generate new insights.
- Estimated Monthly Difference: The change in expected monthly usage when you update your business process types during a reconfiguration.

Viewing Flex Credit Estimates

Before you can access these estimates, you must initiate the setup or reconfiguration of the agent. See Set Up BP Optimize Agent .

As you configure your analysis scope, the configuration summary page dynamically displays your estimates.

Note: The configuration summary page displays these estimates when you configure the agent in a sandbox tenant, but you aren't charged Flex Credits in that environment.

Limitations

- The Flex Credit estimator is intended strictly for budgeting purposes.
- These estimates are provided for informational purposes only, and Workday is not responsible for their accuracy.
- Actual Flex Credit usage might vary from the initial projections based on real-time event volumes and changes in your tenant environment.

BP Optimize Agent Sample Prompts

When you click the **Agent Chat** bubble icon in Workday, you can interact with the BP Optimize Agent and enter specific prompts about business process optimization. When you have more than 1 agent configured, you might need to select the **BP Optimize Agent** from the agent menu. Users with access to Sana for Workday can also query the BP Optimize Agent in Sana.

Use these examples to help you structure your prompts effectively.

Use Case	Sample Prompts
Analyzing Business Processes	• Show me the 3 best performing business processes by duration in Q1 2026. • What are the 3 worst-performing Change Job business processes? • What are the 5 worst send-back counts in December 2025?
Trend Insights	• Can you share trend insights on Request Time Off for Collab Delegation? • How can I improve slow performance? • How are Change Job BPs trending in 2026? • How did recent configuration changes impact the duration of this business process?

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Use Case	Sample Prompts
Benchmark Data	• What are the possible regions I can compare my data to? • What are the benchmarks for Request Time Off for Financial Services? • What's the benchmark for job applications in the Europe region for Q1 2026?

Anomaly Insights	• Which BP has the highest anomaly rate in Q4 of 2025?
	• What's the root cause of anomalies on Change Job BPs in Q1 2026?
	• What are recommendations to remove anomalies on Job Application for Web marketing in 2025?
	  • Can you suggest additional recommendations for the initiation step for the Job Application for Web Marketing?
	  • Can you provide step-by-step instructions on your first recommendation?

Case Agent

About Case Agent

Skills and Tools

The Case agent is an AI agent that assists case solvers with resolving cases in Workday Help.

Skills are specific actions or tasks that an agent can take. Each skill is further made up of tools, which are Workday APIs agents use when executing skills.

Use the:

- **Agent Management Hub** to view the descriptions of each Case Agent skill and which tools are associated with each skill.
- **View Security for Agent Skill** report to view the required and recommended security policies that must be configured for each tool.

Limitations

The Case Agent uses Generative AI, an evolving technology. Although built and tested for high accuracy, it can occasionally present unexpected results. Always review the output. Before acting on the results, verify them against the source of truth.

Case Agent supports these languages:

- Dutch
- English
- French
- German
- Japanese
- Spanish

The *Case Classification* skill is available on the **Create Case** task on Workday Desktop only.

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The *Case Assignment* skill automatically assigns cases that are created using the **Create Case** task on Workday Mobile and Desktop only. It won't assign cases created from email, from business processes, or from the **Create Case Advanced** task. If the case is created on the weekend, the case agent looks at the next working day's (Monday) absence for case solvers to assign cases.

The *Case Summarization* won't summarize content that is contained within files attached to the case conversation or questionnaire.

Set Up Case Agent

Prerequisites

- Help SKU
- Create Integration System User for Case Agent
- Security: These domains in the Agent System of Record functional area:
    - *Agent Compliance*
    - *Agent Management Hub*
    - *Manage: Agents*
    - *Reports: Agent Reporting*
    - *Setup: Agents*

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

1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.

If the value is:

- *UMSA*, the feature is automatically available. See Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, your organization must opt-in to UMSA.

Context

You can set up the Workday Case Agent to enable case solvers resolve their cases more efficiently by classifying, assigning and summarizing cases. Register, configure, and activate the Case Agent in Workday using the **Agent Management Hub** and then enable AI case assignment for your service teams using the **Maintain Case Agent Skills** task.

Steps

1. Access the **Agent Management Hub** report.
2. Select the **Unregistered Workday Agent** tab.
3. For the Case Agent, click **Register**.

   You can only register agents in the products your organization has access to.

   Workday moves the Case Agent to the **Agent Registry** tab.
4. Select the **Agent Registry** tab and then click on the Case Agent name to configure the agent.
5. From the agent's profile view, click **Configure Agent**.

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6. From the **Status** column, enable each relevant skill.
    a) For the Case Classification skill, select the *Employee as Self* security group from the **Available To** prompt.
    b) For the Case Assignment skill, select the security group containing the Case Agent Integration System User from the **Available To** prompt. See Create Integration System User for Case Agent
    c) For the Case Summaries skill, we recommend selecting a security group for case solvers or case managers from the **Available To** prompt .

    Note: Workday evaluates both user access to the agent and the user access to the APIs the agent is executing as tools at runtime, so Workday recommends that you evaluate alignment between the security groups in the **Available To** prompt and the security groups that have permissions for the Tools the agent might execute. Use the **View Security for Agent Skill** report to view detailed information about the agent's tool APIs and the respective domain or business process security policies and permissions.
7. Click **Activate**.
8. (Optional) For the *Case Assignment* skill, access the **Maintain Case Agent Skills** task.
    a) Enter the ISU you created in the **Integration System User for All Ambient Skills** field.
    b) In the *Assignment* tab:
        - Use the **Roles to Exclude from AI Case Assignment for All Service Teams** field to exclude specific roles from AI case assignment. You can view and edit the roles your team members have assigned by accessing **Roles > Assign Roles** as a related action off the service team in the **View Service Team** task.
        - Use the **Select All** check box to enable AI case assignment for all of your service teams.
        - Alternatively, you can use the **Enable** check box to manage AI case assignment for your individual teams.

        Note: We recommend verifying that workers aren't assigned to any included roles to ensure they don't receive case assignments for a team. If a worker is assigned both excluded and included roles, the included role takes precedence, and they will remain eligible for case assignment. To review the assignable roles for your service teams, use the **Maintain Assignable Roles** task to create or manage the roles for your service team in the **Enabled For** column.

Result

Case Agent is enabled in your tenant and case solvers who have access to the security groups you specified for each skill can use that functionality within the Help Workspace.

Case Agent Skills and Reports

A Case Agent skill refers to specific actions or tasks that an agent can take. You can specify which actions or tasks you want the agent to be able to perform by setting each skill as either active or inactive in the **Agent Management Hub**.

Skill and tool configuration changes can take up to 10 minutes to take effect for Case Agent due to caching.

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Skills	Description
Case Classification	Enables employees to classify their cases more efficiently by suggesting case types based on the details of the case. When you enable this skill, the Case Agent will automatically populate the **Case Type** field. You can manually update the field if the suggested case type isn't accurate. The agent suggests a **Case Type** based on the **Case Title** and **Case Description** of a new case. The skill compares the specified **Case Title** and **Case Description** to the available list of **Case Types** and associated **Case Type Descriptions** and makes an appropriate suggestion. We recommend ensuring your **Case Types** and associated **Case Type Descriptions** are current to ensure accurate AI suggestions.
Case Assignment	Automatically assigns a case to a case solver based on their role, absence data, current case workload and security permissions. It ensures your service teams have an optimized and balanced case workload. Case assignment only applies to new cases created from: • Help Center • Mobile Article • QuickTip It doesn't apply to cases created by email, business process, or the **Create Case Advanced** task.
Case Summarization	Enables case solvers to generate a summary of a case using AI. It reduces the effort required to review the case history and document a summary, making it easier to: • Manage multiple cases • Re-assign a case • Manage long running cases with multiple contributors Your summary will be structured with an **Overview** and **Actions Taken** section. Workday uses these fields when generating the summary: • **Case For** • **Case About** • **Case Title** • **Case Description** • **Case Questionnaire** • **Case Messages** • **Internal Notes**

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Considerations

- When automatically assigning cases, the case assignment skill will exclude:
  - Service team members who don’t have the required security permissions to access the case. Example: If a case is confidential, only case solvers with confidential case access will be considered for assignment.
  - Members of the team that belong to a role that has been excluded in the field **Roles to Exclude from AI Case Assignment for All Service Teams** field on the **Maintain Case Agent** task.
  - Service team members on leave or holidays for the full day of the date the case was created. Cases are then assigned to the eligible solver with the fewest cases that have a status of *Open* or *In Progress*, automatically scaling down capacity for partial-day time-off to ensure balanced case distribution.
- The *Case Assignment* skill uses Workday leave data, not third-party data. Assignments based on leave and absence data will only work if the security group the Case Agent Integration System User (ISU) is a member of, is added to the domain security policies for:
  - *Worker Data: Time Off*
  - *Worker Data: Leave & Absence*

  If you don’t want to use leave data, or if your leave data is in an external system and not Workday. You can skip this step and still use the assignment skill, but the skill won't consider case solver leave data when assigning cases.
- When classifying cases:
  - The agent will only suggest case types that the employee has access to based on the configured case eligibility rules. Example: If a rule exists to make the case type ‘EMEA Benefits’ available to employees in Europe, the agent won't suggest this case type to employees creating a case in the United States.
  - When this skill is enabled, the **Case Type** field will be displayed below the **Case For**, **About**, **Case Title**, **Case Description** fields on the **Create Case** task to enable the agent to use the information provided to make an accurate suggestion.

Reports

You can use these Workday-delivered reports to understand the performance and functionality of the Case Agent.

Report	Description
Cases Assigned by Case Agent	View the cases automatically assigned by the Case Agent and the reason for the assignment. Example: A case was assigned to the case solver with the least workload that has access to confidential cases. It also identifies cases that were created through the Help Center, Mobile, Articles and QuickTips but weren’t assigned, and the reason it wasn’t assigned. The **Assignee** column displays the user originally assigned by the agent. If the assignment has been manually overridden, then the **Overridden by a Manual Assignment** column will display *Yes*, and the current case assignee will differ from the name shown in the **Assignee** column of the report.
Case Classification Results	View the cases that were automatically classified by the Case Agent and compare the *AI-Suggested Case Type* to the *Case Type* currently assigned to the case.

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Create Integration System User for Case Agent

Prerequisites

Security: *Security Configuration* domain in the System functional area.

Context

Create a new Integration System User (ISU) specifically for the Case agent, enabling you to assign the ISU to a security group with permissions to access the agent.

Steps

1. Access the **Create Integration System User** task.
2. Complete the prompt:

Option	Description
User Name	Enter a user name specifically for the Case agent.
New Password **New Password Verify**	Set a password. You won't need this password again.
Session Timeout Minutes	Keep the value at zero to prevent the integration system user session from expiring. Expired sessions can cause the integration to stop before it successfully completes.
Do Not Allow UI Sessions	Select the check box.
Time Zone	You can leave this field empty.

3. Access the **Create Security Group** task.
4. Select *Integration System Security Group (Unconstrained)* from the **Type of Tenanted Security Group** field drop-down and enter a **Name**.
5. In the **Edit Integration System Security Group (Unconstrained)** prompt, enter the ISU name you previously created in the **Integration System Users** field and select **OK**.
6. Edit Domain Security Policies

   For the *Case Assignment Skill*, add the security group to these security domains and select the **Modify** check box:

   - *Process: Help Cases*
   - *Help Case Data*
   - *View: Confidential Help Cases*

   To enable the Case agent to access absence data, add the security group to these security domains and select the **View** check box:

   - *Worker Data: Time Off (Time Off)*
   - *Worker Data: Leave of Absence*
7. Activate Pending Security Policy Changes

Result

Your ISU and security is set up for the Case agent.

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Contingent Sourcing Agent

Set Up Contingent Sourcing Agent

Prerequisites

Tenants

To use the Contingent Sourcing Agent, you must have a Workday tenant and a Workday VNDLY tenant.

Subscription Service Agreements

You might need to take additional steps to enable the Contingent Sourcing Agent based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). UMSA is required for non-Production and Production tenants for Workday-Built agents. To determine your subscription service agreement:

1. Select your profile avatar on the Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.
5. If the value is *MSA*, you must opt in to the Universal Main Service Agreement (UMSA).

Flex Credits

Opt in to the Workday Flex Credits and Platform Entitlement Policy.

The Contingent Sourcing Agent consumes flex credits in Production environments for General Availability. It does not consume flex credits in Preview/Test tenants for General Availability. For information about flex credits pricing and billing, see the official flex credits Community page.

Agent System of Record

Set Up Agent System of Record

Context

The Contingent Sourcing Agent is an AI agent in Workday VNDLY that provides data that your program team can leverage to efficiently engage top talent for contingent jobs in the Extended Workforce Management module. The agent has 2 skills: Contingent Talent Rediscovery for Contingent Jobs and Contingent Applicant Grading.

You can set up the Contingent Sourcing Agent to enable clients, MSPs, and program team users to use its skills. During the setup process, you can determine which skills are available in your tenant and grant permissions to user roles to use the agent as needed.

Steps

1. Configure the agent in the **Agent Management Hub** in your Workday tenant.
    a) Access the **Agent Management Hub**.
    b) Select the **Unregistered Workday Agent** tab.
    c) Click **Register** for the agent you want to register.
    You can only register agents in the products your organization has access to.
    d) Select the **Confirm** check box and click **OK**.
    Workday moves the agent to the **Agent Registry** tab.
    e) Select the **Agent Registry** tab and then click the agent name.
    f) Click **Configure Agent**.
    g) Click **Activate**.

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2. Configure your desired skills and settings for the agent on the **AI Enablement** page in Workday VNDLY.

   To view this page, users must have the *ai.settings.read* permission. To change any settings on it, users must have the *ai.settings.write* permission.

   The agent's skills and settings typically display on this page within 30 minutes after you configure the agent in the **Agent Management Hub**. However, if you need assistance with this page, you can submit a product support case. For more information, see AI Enablement in Workday VNDLY.

   a) From the header, select **More > Company Settings**.
   b) In the **Integrations** section, select **AI Enablement**.
   c) In the **Contingent Sourcing Agent** section, turn on the **Candidate Grading** and/or **Recommendations** toggles to enable the desired skills.
   d) Configure your preferences for the **Tenant Data** and **Agent Traces** settings.

3. Grant permissions to enable users to use the agent in Workday VNDLY.

   a) From the header, select **More > Company Settings**.
   b) In the **Security** section, select **Security Settings**.
   c) On the **Roles** tab, open the role you want to add permissions to.

      You can grant permissions to enable client, MSP, and program team user roles to use the agent and its skills.

      Vendors can't use the agent or its skills in their Workday VNDLY user interface. However, you can use the **Send Email to Vendor** feature as part of the Contingent Talent Rediscovery for Contingent Jobs skill to share candidate recommendations with vendors.
   d) In the **Permissions** section, add these permissions as desired:

Permission	Description
applicant_grade.read	For Contingent Applicant Grading, enables users to view grades and AI summaries provided by the agent for candidates on jobs. This includes grades and AI summaries that display on the job's the**Applicants** tab and on job applicant pages.
job.recommendation.read	For Contingent Talent Rediscovery for Contingent Jobs, enables users to view the list of candidates provided by the agent on the job's**Recommendations** tab. This permission also enables users to perform the available actions in the**Actions** drop-down menu, except for**Remove Recommendation**.
job.recommendation.remove	For Contingent Talent Rediscovery for Contingent Jobs, enables users to remove a candidate from the list of candidates provided by the agent on the job's**Recommendations** tab.
job.candidate.grading.override	For Contingent Applicant Grading, enables users to enable or disable candidate grades for a specific job by using the**Grading** toggle that displays on the job form.
job.candidate.recommendations.override	For Contingent Talent Rediscovery for Contingent Jobs, enables users to enable or disable candidate recommendations for a

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Permission	Description
	specific job by using the**Recommendations** toggle that displays on the job form.
candidate.read	For Contingent Talent Rediscovery for Contingent Jobs, enables users to click a recommended candidate's name on the**Recommendations** tab to view their candidate profile.
candidate.ai.preferences.read	For both skills, enables users to view AI settings on a candidate's profile. Workday VNDLY automatically grants this permission to any user roles that have the*candidate.read* permission.
candidate.ai.preferences.write	For both skills, enables users to edit AI settings on a candidate's profile. Workday VNDLY automatically grants this permission to any user roles that have the*candidate.update* permission.
job.vendor.sourced.manage and/or*job.vendor.pre_id.manage*	For Contingent Talent Rediscovery for Contingent Jobs, enables users to use the**Distribute job to vendor: [vendor name]** setting when using the**Send to Vendor** feature.

Result

The agent is configured. Users with the *job.candidate.grading.override* and/or *job.candidate.recommendations.override* permission can enable or disable the skills on specific jobs. See Publish a Job.

The agent may take up to 48 hours to provide grades and/or recommendations after you initially enable its skills on the **AI Enablement** page in **Company Settings**. However, after that 48 hour period, the agent provides grades and/or recommendations within minutes for jobs with the skills enabled.

Related Information
Examples
About Contingent Sourcing Agent
About Contingent Talent Rediscovery for Contingent Sourcing Agent
About Contingent Applicant Grading for Contingent Sourcing Agent
Workday AI Fact Sheet: Contingent Sourcing Agent

Core Reporting Agent

About Core Reporting Agent

The Core Reporting Agent is a conversational AI agent that enables users to:

- Analyze and explore data to answer questions about enabled reports.
- Discover and navigate to alternative Workday reports and tasks when your inquiries extend past the data available in your active report session.
- Summarize report outputs to generate concise overviews of complex datasets.

The Core Reporting Agent simplifies data access and improves data-driven decision-making by providing automated data exploration and information summarization.

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The agent provides answers to complex data inquiries. It uses the current context of which report you're viewing for data analysis and it enforces your existing security permissions so that you can only access data based on your assigned security groups.

Skills

The Core Reporting Agent uses the Data Analysis and Exploration skill and the Redirection and Navigation skill.

The Data Analysis and Exploration skill enables you to:

- Perform contextual data analysis and gain insights on enabled Advanced reports.
- Interact with the data on your reports through multi-turn conversations and generate basic summaries using natural language questions, such as descriptive, summation, anomaly, trend, and outlier questions.
- Review detailed explanations of how the agent arrived at its answers to ensure source transparency and build trust.
- Receive suggested follow-up prompts from the agent.

You can use the Redirection and Navigation skill from the home page, a non-report page, or any supported or unsupported report page. You are not restricted to using this skill on a report page. This skill enables you to:

- Discover and navigate to specific Workday reports and tasks you have access to when your request goes beyond the data available in your active report.
- Streamline task completion via redirection. When you query the agent, Workday finds the relevant authorized reports or tasks and and provides a link to your selection. When you click the link, Workday opens the report or task in the same browser tab, so you can continue your conversation with the agent in the same session.

In addition, you can:

- Engage in complex, multi-turn conversations to conduct deeper analysis of your report data.
- View your prompt history.
- Stop an in-progress query in the Core Reporting Agent chat.

Language Support

The Core Reporting Agent supports interactions in these languages:

- English
- French
- French Canadian
- German
- Japanese
- Spanish
- Dutch

Since the Core Reporting Agent doesn’t officially support interactions outside these languages, recommended prompts might display in the language associated with a user’s locale.

You can’t change the language used for prompts within the same agent session. To use a different prompt language, start a new session.

Core Reporting Agent might not support custom reports with report definitions entered in a non-English language. This behavior depends on tenant translation configuration and user language settings.

When you use the **Translate Custom Report** task, ensure that translated report labels and column headings are accurate and relevant. Irrelevant or inaccurate translations can affect the agent’s ability to interpret report content and respond to questions.

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Limitations

- You can only enable the agent to analyze data for Advanced reports.
- The agent doesn’t support:
  - Scheduled reports.
  - Reports that run in the background.
  - Proxy sessions. Users must be signed in directly with their authorized enterprise credentials.
- The agent can analyze only reports that fall within Workday's file size limit for reports run in the Workday UI. See: Reference: Reporting Limits.
- The Core Reporting Agent can only analyze the report you have open when you prompt the agent. It can't analyze reports you aren't viewing.
- For navigational queries, the agent only suggests and redirects you to tasks and reports that your user account has security access to.
- When you open the Core Reporting Agent from a report, the agent prepares the report data before it can answer questions about that report. For large or complex reports, report data preparation for the agent conversation can take longer than expected, particularly when the report includes a large number of filters or calculated fields. If the agent can't complete the request within 15 minutes, it times out and displays a message asking you to rerun your request with a narrower date range or additional filters.
- After the initial report data preparation, follow-up questions in the same conversation are typically faster, although response times can vary based on the complexity of the user prompt.
- For requests that return large result sets, the agent shows how many results are returned but may summarize or display a subset of the total results for readability. The summary and displayed table might not include all available data. To get more specific results, narrow your request or apply filters to the report.

Example

You need a summary of your team's performance before a check-in. Instead of reviewing all the data manually, you want to ask questions in plain text to receive an automated summary and ask follow-up questions to explore specific details. You also want to act on those insights by finding a related task without leaving your current session.

To do this, you access the **My Team’s Performance Reviews** report and click the Workday Chat icon. You can enter a prompt asking the agent to summarize the data. Example: *Summarize my team's performance*. From there, you can ask follow-up questions to explore the data further. Example: *Which region had the highest overall performance score?* To take action, you can tell the agent what you want to do. Example: *I need to schedule a compensation review for my lowest-performing region.* The agent finds the relevant authorized report or task that you can open in the same browser tab so you can act on your findings without interrupting your session.

Related Information
Examples
Workday Community: Core Reporting Agent AI Fact Sheet
Workday Community: Core Reporting Agent FAQ

Set Up Core Reporting Agent

Prerequisites

Set Up Agent System of Record.

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

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1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value. If the value is *MSA*, you must opt in to *UMSA* before you can register and use the Core Reporting Agent.

   For the Data Analysis and Exploration skill: The feature is automatically available. For the Redirection and Navigation skill: The feature is automatically available, but you must manage your data contribution settings.

   - Access the **Data Contribution for Workday AI** task. In the **Product Line** step, ensure that your organization has not opted out of the **Platform and Product Extensions** product line.
   - In the **ML Features** step, locate the **Redirection and Navigation** feature under the **Platform and Product Extensions** product line. Clear the **Disallow Data Contribution** check box to consent to data contribution. If you select this check box, your organization does not consent to contribute data to this skill.

Opt-in to the Workday Flex Credits and Platform Entitlement Policy for usage in Production tenants.

Context
The Core Reporting Agent helps answer questions and complete data analysis directly within enabled Report Writer reports. The agent evaluates the specific datasets you configure for analysis to help you get insights from your data.

Steps

1. Access the **Agent Management Hub** report.
2. Select the **Unregistered Workday Agent** tab.
3. Click **Register** for the Core Reporting Agent.

   You can only register agents in the products your organization has access to.

   Workday moves the Core Reporting Agent to the **Agent Registry** tab.
4. Select the **Confirm** check box and click **OK** to complete the registration. Workday moves the Core Reporting Agent to the **Agent Registry** tab.
5. Select the **Agent Registry** tab and click **Core Reporting Agent**.
6. Click **Configure Agent**.
7. In the **Status** column, enable each relevant skill.
8. Select the security groups from the **Available To** prompt.
9. (Optional) If you enable the Data Analysis and Exploration skill, define which reports it can access:
   a) Click **Maintain Core Reporting Agent Configuration** in the **Additional Configuration** column.
   b) Add filter conditions to define the enabled reports:

Option	Description
Data Source	Select specific data sources to enable all associated reports at once.
Supported Report Tag	Select specific tags to enable a group of reports across different areas.
Supported Report Definition	Select specific reports.
Supported Report Type	Select *Advanced*. If *Matrix* is selected, remove it to prevent the agent icon from appearing on unsupported reports. The

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Option	Description
	Data Analysis and Exploration skill only analyzes data within Advanced reports.

c) Click **Preview** to review which reports are available for analysis based on your configuration and then click **OK**.

10. Click **Save**.
11. Click **Activate**.

Result

You can access Workday Chat while viewing an enabled custom report to use the Core Reporting Agent. If the Workday Chat icon doesn't display, sign out and sign back in to Workday.

Example

Next Steps

Access the Workday Chat icon from the home page or an enabled report to use the Core Reporting Agent.

You can activate, deactivate, and reactivate the Core Reporting Agent in the **Agent Management Hub**.

Related Information
Examples
2026R2 Feature Release Note: Core Reporting Agent

Core Reporting Agent Skills

The Core Reporting Agent includes 2 skills that help you analyze your report data and navigate to related Workday content.

Skill	Description	Limitations
Data Analysis and Exploration	Provides contextual data exploration and insights for your Workday reports. This skill enables you to get answers to your data questions without needing to understand the underlying data structures. When you query the agent, Workday generates automated summaries and explanations of your report data. You can ask follow-up questions or select a suggested follow-up prompt from the agent to continue exploring the data.	The agent only provides analysis of the specific report data it's enabled on. You can only use the Data Analysis and Exploration skill to analyze data within Advanced reports.
Redirection and Navigation	Provides navigational support to streamline task completion by directing you to the information you need. This skill enables you to discover and navigate to specific Workday reports and tasks you have access to when your request goes beyond the	The agent only suggests and redirects you to tasks and reports that your user account has the security permissions to access.

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Skill	Description	Limitations
	data available in your active report. When you query the agent, Workday finds the relevant reports or tasks that you're authorized to access and provides a link to open your selection in the same browser tab. You can continue your conversation with the agent in the same session.	

Decision Intelligence

Set Up Decision Intelligence

Prerequisites

Note:

To register and use agents in the Agent System of Record fully in your tenants, you must opt in to the Universal Main Service Agreement (UMSA). UMSA is required for non-Production and Production tenants for Workday-Built agents.

To determine your subscription service agreement:

1. Select your profile avatar on Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value. If the value is MSA, you must opt in to the Universal Main Service Agreement (UMSA)

Flex credits are only required for registering and using agents in your production tenants. You will not be able to register and use any agents in production until you've opted into these agreements. UMSA is required for non-production and production tenants for Workday-Built agents. UMSA is not required for non-production tenants for self-built agents.

- Opt in to the Workday Flex Credits and Platform Entitlement Policy. This is only required for registering and using agents in your Production tenants.
- If you access Adaptive Planning directly from Workday, Set Up Agent System of Record and follow the steps in the **Steps** section below.

Context

Decision Intelligence is an AI-powered analytical workspace that integrates directly with your Adaptive Planning data to streamline financial analysis and scenario modeling. You can use DI to:

- Explore data from internal sources and external file uploads (CSV and Excel).
- Model what-if scenarios.
- Submit changes to Adaptive Planning using your existing security and approval chains.

The steps to set up DI vary based on how your organization accesses Adaptive Planning.

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- **Adaptive Planning standalone instances**: If you access DI from an Adaptive Planning standalone instance, you must assign the Access Decision Intelligence permission to users.
    - From the Global Navigation menu, click **Administration > Permission Sets > Access Decision Intelligence**.
- **Adaptive Planning access from Workday**: If you access Adaptive Planning directly from Workday, you can follow the steps below to register and configure DI in Workday's Agent System of Record (ASOR), which enables you to manage and govern all your agents. By registering agents in this system, you can:
    - Reduce administrative overhead.
    - Gain data insights into agent performance and business impact.

Steps

1. Access the **Agent Management Hub**.
2. Select the **Unregistered Workday Agent** tab.
3. Click **Register** for **Decision Intelligence**.

   You can only register agents in the products your organization has access to.

   Workday moves the agent to the Agent Registry tab.
4. Select the **Agent Registry** tab and then click **Decision Intelligence**.
5. Click **Configure Agent**.
6. In the **Status** column, enable these skills:
    - Decision Intelligence - Standard
    - Decision Intelligence - Advanced
    - Decision Intelligence - Highly Advanced
7. From the **Available To** prompt, select the security groups that you want to make able to access the Decision Intelligence skills.

   Note: Workday evaluates both user access to the agent and to the APIs the agent is executing as tools at runtime. Workday recommends that you evaluate alignment between the security groups in the **Available To** prompt and the security groups that have permissions for the tools the agent might execute.
8. Click **Activate**.

Next Steps

After you've set up DI, you can access it from the **Global Navigation** menu in Adaptive Planning.

About Decision Intelligence

Decision Intelligence (DI) enables analysts to use AI to investigate data, explore what-if scenarios, and submit changes to Adaptive Planning through existing security and approval chains. DI uses your existing chart of accounts, consolidation hierarchy, organizational structure, and security context. You can analyze financial data without exporting information, setting up external data connectors, or engineering prompts.

You access DI from the Global Navigation menu in Adaptive Planning. Prompt DI in plain language to analyze and model against your data. Every computation runs in an isolated environment with no access to external networks or other tenants' data. You can use DI to:

- Investigate variances and receive structured breakdowns by dimension, driver ranking, and contribution analysis.
- Analyze root causes using mix-shift analysis, correlation analysis, and statistical hypothesis testing to decompose performance shifts across dimensions.
- Model and compare scenarios by building what-if cases as assumption deltas on a baseline.

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- Run Monte Carlo simulations to model probability-weighted outcome ranges across key assumptions to quantify risk and confidence intervals in your forecasts.
- Reforecast from drivers by projecting financial outcomes from operational inputs, such as pipeline, headcount, and conversion rates, using regression analysis and trend modeling.
- Apply advanced analytics, including linear regression, time series decomposition, cohort analysis, and Pareto analysis, using natural language.
- Generate narrative summaries grounded in your analysis, including variance explanations, scenario comparisons, and quarterly performance summaries.

Data Sources

You can bring your data into DI by:

- Uploading CSV or Excel files directly in a prompt by clicking **Plus** and then **Attach**. You can upload multiple related files, such as actuals, budget, and headcount, and DI joins them automatically. DI scans files for viruses and prevents malicious files and files that can't be scanned from being uploaded.
- Adding Matrix Reports from Adaptive Planning to a project by clicking **Plus > Add from Adaptive > Matrix Reports**, and then selecting the reports you want to add. DI works with both the report's definition and data, enabling you to expand report details and rerun reports with different parameters.
- Using your existing Adaptive Planning standard sheets, modeled sheets, and cube sheets, including any dimensional intersection. When DI pulls data from Adaptive Planning, it also fetches the relevant structures.

When you combine multiple data sources in a single project, such as a Salesforce pipeline export and your Adaptive Planning forecast, DI joins them automatically using shared dimensions like time period, region, or cost center. You can run cross-source analysis in a single conversation. Example: *Using the pipeline data I uploaded and the Q4 plan from Adaptive, show me where the revenue forecast is at risk.*

When you bring data into DI, it reads your files or Adaptive Planning data and builds a semantic model of your data's structure that ensures that every query DI runs is valid and traceable. You can:

- Review the model in the model panel to see dimensions, measures, formulas, and how datasets connect. There are 2 ways to view the model:
  - Click the project name header and select *View model*.
  - Click the folder icon in the upper-left corner of the canvas and click the model.

  When the model panel is open, you can choose to view the model as a list or diagram.
- Correct the model through conversation. Example: If DI misclassifies a column, you can provide a correction. DI then updates the model and saves the correction to the project.
- Define formulas, which are computed measures that derive from existing data. Example: Gross Margin = Revenue - COGS. DI stores formulas in the model and applies them to all future queries.

Calculation Traceability

Every computed number in DI traces back to source data. You can ask DI to explain any result to view the full calculation chain, including:

- The data DI used.
- The formula DI applied.
- How DI derived intermediate results.

Example: *Show me exactly which rows you used for that number*.

Calculation traceability works across the full analysis chain. If a variance breakdown feeds into a scenario, DI can trace the scenario output back through the variance calculation to the original data.

If a number looks wrong, you can ask DI to show its reasoning and correct it if needed.

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Projects

Starting a new conversation in DI creates a project, which is a persistent workspace that keeps your data, semantic model, conversation history, and analysis artifacts together. You can open an existing project and conversation from the home page or the navigation menu to continue your analysis where you left off.

You can view a project's full inventory, including its sources, artifacts, and semantic model, by clicking the folder icon at the top of the canvas. From the inventory, you can open and close artifacts, including dashboards created throughout your conversation, as tabs in the canvas. When you update a dashboard, DI gives it a new version. DI displays the most recent version of a dashboard when you open it, but you can access previous versions from the version list when the dashboard is open. You can rename an artifact by double-clicking its tab or clicking the **More Actions** menu on the tab. You can also pin an artifact from the **More Actions** menu to keep it always on top.

Playbooks

A playbook is reusable analysis you can run in one click, rather than writing a prompt from scratch. DI includes 2 Workday-created playbooks:

- **Headcount Walk Analysis** compares 2 workforce versions and produces a canvas of the headcount walk. It shows the headline position, where the change is concentrated, and a filterable register of added, removed, reassigned, and reclassified positions.
- **Budget vs. Actuals Variance Analysis** delivers full-P&L budget-to-actual variance analysis as a 3-tab canvas, including:
    - A variance overview with a budget-to-actual bridge.
    - Ranked contributors.
    - Drivers with next steps.

You can open a playbook from the:

- Navigation menu.
- Chat prompt by:
    - Clicking **Sources** > **Playbooks** and selecting a playbook.
    - Entering a forward slash (/) and selecting a playbook.

You can add custom instructions when you run a playbook to adjust the analysis, such as specifying a region, time period, or focus area. You can add instructions to a playbook:

- In the **Additional instructions (optional)** field when you open the playbook from the navigation menu.
- In the chat prompt when you open a playbook using the forward slash. Example: /budget-vs-actuals for the west region.

The playbook's methodology remains the same, so it runs with the same instructions to produce consistent, comparable results.

Outputs and File Exports

You can edit DI’s analytical outputs by changing chart types, sorting and filtering data, and drilling into specific dimensions. Each change you make creates a new version of the output. You can switch between versions to compare changes and decide which one works best.

DI can generate these visualization types:

- Bar charts and grouped bar charts
- Waterfall (bridge) charts for contribution decomposition
- Line charts for trends and time series projections
- Scatter plots and correlation matrices
- Tornado charts for sensitivity rankings

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- Tables with inline data
- KPI dashboards with delta indicators
- Monte Carlo probability distributions with confidence intervals
- Multi-panel interactive dashboards with filters, sliders, and drill-down controls

DI also can produce finished deliverables in the format you need, such as a board summary, a variance report, or a scenario comparison deck. Example: *Create a PowerPoint summarizing the Q3 variance analysis with the waterfall chart and my recommended reforecast.* DI generates a downloadable file containing your analysis. DI supports these file formats:

- PDF (.pdf)
- Microsoft PowerPoint (.pptx)
- Microsoft Word (.docx)
- Microsoft Excel (.xls, .xlsm, .xlsx)
- CSV (.csv)
- Markdown (.md)
- JSON (.json)
- YAML (.yaml)

You can also export the underlying data as CSV from any table.

Submit to Plan

When you're ready to act on a scenario, DI displays a structured preview of the proposed changes, including:

- Every cell that will change, organized by account, level, time period, and any custom dimensions.
- The current value and the new value for each cell, including the delta.

When you approve the changes, DI submits them to Adaptive Planning along with the full context of how the numbers were generated. DI checks the underlying plan data to determine if it has changed since your analysis began, and warns you if it has before submitting the changes to Adaptive Planning.

DI Data Contribution

Workday collects operational telemetry and agent execution traces to monitor system behavior and improve the product experience. Workday doesn’t use your data to retrain or fine-tune the foundation model.

You can disable the collection of this data:

- For Adaptive Planning standalone instances, select **Administration > General Setup > Disallow Data Contribution in Adaptive Planning**.
- If your Adaptive Planning instance is Workday-enabled, access the **Data Contribution for Workday AI** report to disable your data contribution. See Manage Workday AI Data Contributions for Universal Main Subscription Agreement Customers .

Disabling your data contribution can impact Workday's ability to troubleshoot any unexpected behavior with responses from DI.

Labs

The Labs feature enables you to use features that are still in development in DI before they're released to Production. The early-access features might be changed or removed from DI at any time.

To turn on Labs, click your User Profile and then click **Settings**. In the **Advanced** section, enable the Labs setting. All features available through Labs have a **Labs** label next to them in DI to distinguish them from Production features.

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At this time, the Create Playbook feature is the only early-access feature available through Labs. Access **Playbooks** from the navigation menu and click **Create Playbook** to create your own repeatable analysis that you can run in 1 click.

Limitations

Feature	Limit
File upload size	50 MB total per message (resets each message)
Files per prompt	10
Prompt length	100,000 characters
Supported file types	.csv, .xlsx, .xls, .xlsm
Submit to plan	DI can submit to Adaptive Scenarios, and assist you in merging the scenario into the base version. Submits to all sheet types, but can't create or manage splits.
What-if scenarios	Adaptive Planning limitations for what-if scenarios also apply to DI. See ../../../../../../adaptive-planning/en-us/product-support/Reference--Adaptive-Planning-Limits.dita.

DI parses cell data, formulas, number formats, named ranges, and table structures from Excel files. Macros in .xlsm files are accepted at upload but not executed.

DI doesn't support:

- External data connectors. You can't connect DI directly to external systems. You can upload exports from those systems as CSV or Excel files.
- Scheduled or recurring analyses.
- Project sharing. Projects are per-user. To share results, you must export files.
- Real-time Adaptive data sync. DI fetches Adaptive Planning data at the time you request it and doesn't update the data if the underlying plan changes during your session. When you submit, DI catches changes made since your analysis began. It displays the current values in the approval preview, which you can approve or reject.
- File uploads beyond spreadsheets.
- Personalization. Your preferred chart types, default dimensions, and narrative style don't carry over between projects.
- Web search.

Troubleshooting

Issue	Solution
DI provides a number that seems incorrect.	Prompt DI to provide specifics on the calculation. Example: *Show me exactly which rows you used for that number*. I can display the reasoning for the answer and the specific data behind any result. If the semantic model needs correction, tell DI directly.
A file upload failed.	Verify that: • The file type is CSV or Excel (.xlsx, .xls, .xlsm).

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Issue	Solution
	• The total size of attachments in the prompt is under 50 MB. The 50 MB limit resets with each prompt. • You can upload additional files in subsequent prompts. The file is not corrupted or password protected.
DI is slow or unresponsive.	Complex analyses with large datasets take longer. Refresh the page if DI is unresponsive. If the issue persists, start a new prompt in the same conversation. Your project and history are preserved.
Analysis doesn't match expectations.	Rephrase your question with more specifics, including the time period, dimensions, and measures you want. Open the model panel to verify that the semantic model is correct. If a column is misclassified, tell DI. Example: *Region should be a dimension, not a measure*.
Lost work or missing history.	Project history persists across sessions. Return to the project from the projects list. If a conversation is truly missing, report the issue to Workday with the full page URL.

Related Information
Examples
2026R1 Release Note: Decision Intelligence
Workday Community: Decision Intelligence AI Fact Sheet

Reference: Decision Intelligence Prompts

You can use these prompt examples to help you explore data and model scenarios.

Use Case	Sample Prompt
Ad hoc analysis	Walk me through the biggest movers in last quarter's P&L and draft a one-paragraph narrative for the board readout.
Cohort and Pareto analysis	Which 20% of cost centers account for 80% of the budget variance? Show me the Pareto curve.
Contribution analysis	What are the top 5 drivers of the margin decline? Break it down by region and product line.
Driver-based reforecasting	Using this pipeline data and the headcount plan, build a Q4 revenue reforecast. Show what happens if we slip the new product launch by one quarter.
Monte Carlo simulation	Run a Monte Carlo simulation on Q4 revenue using the historical variance in our pipeline conversion rates. Show me the P10, P50, and P90 outcomes.

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Use Case	Sample Prompt
Regression and trend analysis	Fit a regression to our quarterly revenue over the last 3 years and project the next 4 quarters. What's the R-squared and which drivers are most significant?
Root cause analysis	What's causing the spike in SG&A? Decompose by cost center and show me the biggest movers.
Scenario modeling	Build three scenarios from this baseline: optimistic, conservative, and a stretch case. Compare them side by side.
Sensitivity analysis	Show me how net revenue changes if we vary the conversion rate from 10% to 25% in 5-point increments.
Variance investigation	Why is EMEA revenue down in Q3?
Vendor analysis	Flag vendors with year-over-year increases above 15% and model the impact of consolidating the top 5.
Workforce planning	Model the cost of a 4% merit increase across the organization plus 8 new hires in Q2. Show the fully loaded cost projection.

Prompt Best Practices

- Upload all relevant data at the start to provide DI with the full picture.

  Example: Upload actuals alongside budget and headcount before you start asking questions.
- Frame the decision, not just the data. Example: Use the prompt *Help me decide whether to delay the product launch* rather than *Show me the revenue data*.
- Push back when something looks wrong. Example: To see a step-by-step explanation of how DI provided the incorrect information, enter into the chat: *That doesn't look right. Walk me through how you calculated that.*
- Click the thumbs up or thumbs down icon to provide feedback on the quality of a response. If you click thumbs down, you can provide feedback on how the response can be improved.
- Review before acting. DI is a decision-support tool. Always review outputs before submitting changes to plan.

FAQ: Decision Intelligence

Is my data used to train the AI model?	No. Workday doesn't use your data to retrain or fine-tune the foundation model. You can disable operational telemetry at any time by selecting **Administration > General Setup > Disallow Data Contribution in Adaptive Planning**.
Can I use DI with data from systems other than Adaptive Planning?	You can upload CSV and Excel files from any source. Direct connectors to additional data systems are planned for future releases.
Does DI replace Adaptive Planning?	No. DI is the analytical workspace for exploration and modeling. Adaptive Planning remains the system of record.

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What's the difference between DI and the Planning Agent?	The Planning Agent (Ask Workday for Adaptive Planning) operates within Adaptive Planning for quick, contextual questions about your existing models. DI is a standalone analytical workspace for deeper investigation, multi-source analysis, and scenario modeling.
What happens to the data that I upload?	Uploaded data is stored securely within your project. It is not accessible to other tenants or users outside your security group.
Can I share a project with other users?	Projects are currently per-user. Collaboration capabilities are planned for future releases.
Can I delete uploaded files from a project?	You can start a new project at any time. File-level deletion within a project is planned for a future release.
What languages does DI support?	U.S. English. Additional language support is planned for future releases.

Deployment Agent in Implementation Environments and Customer Central

Set Up Deployment Agent in Implementation Environments and Customer Central

Prerequisites

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

1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.

If the value is:

- *UMSA*, the feature is automatically available. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, your organization must opt in to UMSA.

Implementation, Sandbox, and Preview Tenants	• Set Up Agent System of Record . • Security: *Reports: AI Agent Security* domain in the System functional area.
Customer Central Tenant	• Set Up Agent System of Record in Customer Central . • (Optional) To provide auditing access to to users: Security: *Reports: AI Agent Security* domain in the System functional area.

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Context

Workday doesn't automatically enable the Deployment Agent across your non-Production tenants. You must configure security and activate the agent in the Agent System of Record (ASOR) for each tenant. For example, if you set up the agent on Customer Central, you must also configure it on the non-Production tenants connected to Customer Central.

To avoid manually reconfiguring the agent in your Sandbox tenants after each tenant refresh, we also recommend setting it up in your Production tenant. Though the Deployment Agent isn't accessible for use in Production environments, you ensure it persists and propagates to your Sandbox tenants during standard refresh cycles when you establish the configuration in Production.

Steps

1. Sign in to the tenant you want to configure.
    - For Implementation or Preview tenants: Sign in directly to the specific tenant.
    - For Sandbox tenants: Sign in to your Production tenant to ensure the configuration persists across future tenant refreshes.

      If you need to use the agent in your Sandbox before the next refresh, complete this setup in Production and repeat it in your Sandbox tenant to cover the gap.
2. Create the domain security policy for the Deployment Agent.

   If a policy already exists, skip this step. To verify if a policy exists:
    a) Access the **Create Security Policy for Domain** task.
    b) Select the **For Domain** prompt and enter: *Deployment Agent*.
        - If it doesn’t display, the policy exists. Skip this step.
        - If it does display, select it and click **OK** to create the policy.
3. Edit the security policy and assign security groups.
    a) Search for **View Domain** and enter the domain name: Deployment Agent Users.
    b) From the related actions menu of the domain, select **Domain > Edit Security Policy Permissions**.
    c) In the **Report/Task Permissions** grid, add a new row.
    d) In the new row, select the security groups to which you want to grant access. Example: Implementers.
    e) Select **View** permissions.
    f) Click **OK**.

       The Agent System of Record requires these security groups when you configure the Deployment Agent in the **Agent Management Hub**.
4. (Optional) Assign users to security groups.

   If you haven't already done so, assign users to security policies by adding them to security groups included in the policy.
    - To assign multiple users to a single user-based security group: Access the **Assign Users to User-Based Security Group** task.
    - To assign a single user to 1 or more user-based security groups: Access the **Assign User-Based Security Groups for Person** task.

   You can combine multiple user-based security groups into an aggregation security group.
5. Activate security policy changes.
    a) Access the **Activate Pending Security Policy Changes** task
    b) Enter a comment describing your changes.
    c) Review the pending changes and select the **Confirm** check box.
    d) Click **OK** to activate the changes.

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6. Register the Deployment Agent.

   You must register the Deployment Agent in the tenant before you can configure it.

   a) Access the **Agent Management Hub** report.
   b) Select the **Unregistered Workday Agent** tab.
   c) For the Deployment Agent, click **Register**.

      You can only register agents in the products your organization has access to.

      Workday moves the Deployment Agent to the **Agent Registry** tab.

7. Configure the Deployment Agent.

   After you register the Deployment Agent, configure its skills in the tenant.

   a) On the **Agent Registry** tab, click *Deployment Agent* .
   b) From the profile view of the agent, click **Configure Agent**.
   c) In the **Status** column, use the toggle slide to enable the skills you want.

      Example: To enable the Deployment Agent Ask skill, enable both the Tenant Inspection and Implementation Knowledge skills. For specific steps, see Enable Deployment Agent Ask Skill .

   d) For each enabled skill, populate the **Available To** prompt with the security groups that you want to provide access to for that specific skill.

      The security groups added to the **Available To** prompt for an agent establish the interaction policy of the agent.

      Note: Ensure the security groups you add also belong to the *Deployment Agent Users* domain security policy. Workday displays an error validation when the security group you add here isn't also part of this policy. Users in the security group won't have access to the Deployment Agent in the tenant.

8. Activate the Deployment Agent.

   When you complete agent configuration, you can activate the Deployment Agent in the tenant.

   a) Click **Activate**.
   b) If prompted, confirm activation.

Result

You can now access the Deployment Agent and view chat histories in the configured tenant. Workday isolates chat histories by tenant. Example: You can't view histories from a Sandbox tenant within a Preview tenant.

Note: Workday retains chat histories for 14 days before permanently deleting them.

Next Steps

You can activate or deactivate the Deployment Agent at any time in the **Agent Management Hub**. If you configured the agent in your Production tenant for Sandbox refreshes, you must deactivate it in Production; otherwise, the agent automatically reactivates in the Sandbox during the next refresh.

Related Information

Tasks

Set Up Agent System of Record

Reference

Deployment Agent Skills and Capabilities in Implementation Environments and Customer Central

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Set Up Agent System of Record in Customer Central

Prerequisites

- Activate Customer Central with Customer Central accounts. Customer Central requires its own administrator and security administrator accounts. To set up the Agent System of Record (ASOR), you must have a Customer Central security administrator account. See ../../../../manage-workday/tenant-configuration/implementation-tools/customer-central/set-up-customer-central-accounts/xhv1558695752502.dita.
- Connect Customer Central to any Implementation, Sandbox, or Preview tenants where the Deployment Agent needs tenant awareness. See ../../../../manage-workday/tenant-configuration/implementation-tools/customer-central/set-up-customer-central-tenant-access/kyi1573816345719.dita.
- Your organization must use a supported data center. The agent currently supports US and EU regions, but doesn't yet support Canada, Australia, UK, Japan, or Federal data centers.

Context

To register and manage the Deployment Agent in Customer Central, you must configure the Agent System of Record (ASOR). This requires creating a dedicated security group for agent administration and configuring the necessary domain security policies to grant view and modify permissions.

Steps

1. Sign in to your Customer Central tenant as a Customer Central security administrator.
2. Access the **Maintain Functional Areas** task.
    a) Select the **Enabled** check box for the Agent System of Record functional area.
    b) Click **OK** and then **Done**.
3. Access the **Activate Pending Security Policy Changes** task.
    a) Enter a comment and click **OK**.
    b) Select the **Confirm** check box and click **OK**.
4. Access the **Create Security Group** task.
    a) From the **Type of Tenanted Security Group** prompt, select *User-Based Security Group*.
    b) Enter *Agent Administration* as the name and click **OK**.
    c) Click **OK** again and then **Done**.
5. Access the **View Security Group** report.
    a) From the **Security Group** prompt, select *Agent Administration* and click **OK**.
    b) Select **User-Based Security Group > Assign Users** from the related actions menu of the Agent Administration security group.
    c) From the **Systems Users** prompt, select a member or members.
    d) Click **OK** and then **Done**.

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6. Create or edit the security policies for these domains to add the Agent Administration security group:
    - *Agent Management Hub*: Enables administrators to find unregistered agents.
    - *Setup: Agents*: Enables administrators to register agents.
    - *Manage: Agents*: Enables administrators to configure agent skills.

    a) Access the security policy configuration for the domain.

    If a policy for the domain doesn't exist in the tenant:

    - Access the **Create Security Policy for Domain** task.
    - From the **For Domain** prompt, select the domain.
    - Select the **Confirm** check box, and click **OK**.

    If a policy exists:

    - Access the domain directly. Example: domain: agent management hub.
    - From the related actions menu of the domain, select **Domain > Edit Security Policy Permissions**.

    b) Add a row to the **Report/Task Permissions** grid.
    c) In the **Security Groups** column, select **Agent Administration**.
    d) Select **View** and **Modify** permissions.
    e) Click **OK** and then **Done**.
7. Access the **Activate Pending Security Policy Changes** task.
    a) Select the security policies you created or edited.
    b) Enter a comment and click **OK**.
    c) Select the **Confirm** check box and click **OK** to activate the changes.

Related Information
Tasks
Set Up Agent System of Record

Enable Deployment Agent Ask Skill

Prerequisites

- Have access to the tenants in which you want to use the Deployment Agent Ask skill:
    - Implementation
    - Sandbox
    - Preview
    - Customer Central (for inspecting connected tenants)
- Configure security and register the Deployment Agent in each non Production tenant where you plan to use the Ask skill. For initial setup, see Set Up Deployment Agent in Implementation Environments and Customer Central .

Context

To enable the Deployment Agent to discover live configuration data in your implementation or connected Customer Central tenants, activate the Ask skill in the Agent Management Hub. This single skill performs a read-only inspection of your environment and provides the essential documentation guidance you need to answer questions.

To ensure the agent and its skills don't reset after Sandbox refreshes, configure them in your Production tenant to ensure your configuration persists in Sandbox tenants during standard refresh cycles. The Ask skill consumes no Flex Credits in Production tenants. Workday retains chat histories for 14 days and then permanently deletes them.

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Steps

1. Sign in to the tenant in which you want to enable the Deployment Agent with the Ask skill.
2. Access the **Agent Management Hub** report.
3. Select the **Agent Registry** section.
4. Select *Deployment Agent*.

   If you don't see the Deployment Agent, ensure that it's a registered agent:

   a) Select the **Unregistered Workday Agent** tab.
   b) Locate the *Deployment Agent* in the list and click **Register**.
   c) Select the **Confirm** check box and click **OK**.

   The Deployment Agent now displays on the **Agent Registry** tab, where you can select it.
5. On the Deployment Agent profile, click **Configure Agent**.
6. In the **Status** column, use the toggle to enable the Ask skill.
7. In the **Available To** column for the Ask skill, select the security groups to which you want to grant access.

   The security groups you add establish the interaction policy of the agent.

   Note: Ensure the security group you add also belongs to the *Deployment Agent Users* domain security policy. We recommend using the **View Security for Agent Skill** report to ensure the security groups you select also have the necessary permissions for the agent to function correctly.
8. Click **Save** or **Activate** (if the agent hasn't yet been activated).

Example

Next Steps

The Deployment Agent currently lacks UI indicators to show a skill is active. To verify that you successfully enabled the Ask skill, submit a prompt that requires the Deployment Agent to retrieve configuration information.

Example: *Find me 5 calculation fields in the Implementation tenant*.

Verify the agent's response using the **View Calculated Field** task.

Related Information
Reference
Deployment Agent Skills and Capabilities in Implementation Environments and Customer Central

Deactivate the Deployment Agent in the Agent Management Hub

Prerequisites

Ensure your account has administrative permissions assigned to these security domains to manage agents:

- *Agent Management Hub*
- *Manage: Agents*
- *Setup: Agents*

Context

You can deactivate the Deployment Agent at any time in the Agent Management Hub. To stop it from consuming Flex Credits altogether, you must deactivate it in each tenant on which you set it up. For example, if you configured the agent in your Production tenant for Sandbox refreshes, you must also deactivate it in Production; otherwise, the agent automatically reactivates in the Sandbox during the next refresh.

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When you deactivate the Deployment Agent in a tenant, Workday hides the agent from users but keeps it accessible in the **Agent Management Hub** so you can reactivate it in the future as needed.

Steps

1. Sign in to the tenant for which you want to deactivate the agent.
2. Access the **Agent Management Hub**.
3. On the **Agent Registry** tab, click the *Deployment Agent* name.
4. Click **Deactivate Agent**.
5. Confirm the deactivation if prompted.

Result

The ASOR-enabled Deployment Agent is no longer available for use in the tenant. Flex Credit consumption stops in the tenant.

Deployment Agent in Implementation Environments and Customer Central

Overview and Purpose

The Workday Deployment Agent is an AI-powered conversational assistant enabled through the Agent System of Record (ASOR), the centralized framework where administrators register, configure, and activate the agent. This ASOR-enabled version leverages Large Language Models (LLMs) and a retrieval-augmented generation (RAG) framework to provide configuration intelligence for implementers and administrators in these non-Production tenants:

- Implementation
- Sandbox
- Preview
- Customer Central

Note: The Deployment Agent isn't available as a conversation assistant in Production tenants.

The Deployment Agent acts as a specialized technical architect that doesn't just search for keywords, but understands the logic, dependencies, and structural requirements of the Workday platform. When you enable the Ask skill through the **Agent Management Hub**, the agent functions as a specialized knowledge assistant that synthesizes:

- Live configuration data: Performs read-only inspections of configuration data such as calculated fields, condition rules, business processes, and reports to deliver tenant-grounded answers.
- Workday Administrator and User Guides: Provides step-by-step how-to instructions and functional definitions.
- Community articles and Q&A: Leverages Workday-accepted, real-world peer solutions and troubleshooting tips.
- Implementer-only documentation: Offers technical guidance previously restricted to service partners.
- Web service descriptions (WSDLs): Interprets SOAP or integration errors and identify missing data fields or security permissions.

Environment Setup Strategy

Configuring the Deployment Agent in 1 tenant doesn’t automatically enable it in others. Setting up the ASOR-enabled agent in both Customer Central and implementation environment tenants provides comprehensive support to your teams by serving different users and workflows.

Customer Central	Setting up the ASOR-enabled Deployment Agent on Customer Central supports customers who access, manage, and execute configuration changes and migrations across their tenant

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	landscapes. The agent provides a centralized troubleshooting tool, serves unique Customer Central administrative roles that lack local tenant access, and enables central governance. This tenant-aware version of the agent uses the Ask skill to deliver tenant-grounded answers across all connected Implementation, Sandbox, and Preview tenants that the user can access. To use this version, a security administrator must register and activate the agent in the ASOR through the Agent Management Hub and enable the Ask skill.
Implementation Environments	This tenant-aware version of the agent uses the Ask skill to deliver tenant-grounded answers across all connected Implementation, Sandbox, and Preview tenants that the user can access. To use this version, a security administrator must register and activate the agent in the ASOR through the Agent Management Hub and enable the Ask skill.

Deployment Agent (Q&A) on Customer Central

In addition to the ASOR-enabled version, Customer Central users have access to an alternative agent called the Deployment Agent (Q&A). You access this version (previously the **Deployment Agent** task) through the **Deployment Agent (Q&A)** task to receive a general Q&A experience.

Implementation, Sandbox and Preview Tenants

In Implementation, Sandbox, and Preview tenants, the Deployment Agent uses the Ask skill to read configuration data solely from the active tenant. Workday recommends enabling the Implementation Knowledge skill alongside Tenant Inspection so the agent can combine general deployment guidance with tenant-specific inspection.

Unlike the ASOR-enabled version, the Deployment Agent (Q&A) relies solely on Workday documentation and Community content. It doesn't inspect your tenant configuration, lacks tenant awareness, and requires no UMSA or ASOR setup.

See ../../../../manage-workday/tenant-configuration/implementation-tools/Deployment-Agent/concept--workday-deployment-agent.dita.

Business Benefits

- Reduces time spent searching documentation and manually validating tenant setup by grounding answers in your live configuration.
- Identifies dependencies before you make changes, accelerating implementation and sandbox work without leaving your current task.
- Helps troubleshoot business process and configuration issues with greater accuracy.
- Provides immediate answers to how-to questions, reducing the time spent searching external sites.
- Helps identify the root causes of web service errors, like SOAP errors, or business process logic failures.
- Provides an environment for users to quickly get up to speed on unfamiliar functional areas.
- Maintains system stability and security by routing implementation tenant AI traffic through the Agent Gateway, ensuring all interactions are authenticated and audited.

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Operational Limits and Sandbox Tenant Refreshes

The Deployment Agent assists, rather than replaces, human expertise. It might occasionally produce inaccurate or incomplete information. You must validate all suggestions against official Workday documentation.

To maintain system performance, the agent automatically summarizes conversation history once a thread reaches a certain length. Start a new chat for each new topic to keep your interactions focused. Workday retains chat histories for 14 days before permanently deleting them.

To avoid manually reconfiguring the Deployment Agent and its enabled skills after every Sandbox tenant refresh, Workday recommends configuring your initial setup in your Production tenant. Though you can't use the Deployment Agent in Production environments, establishing the configuration there ensures it automatically propagates to your Sandbox tenant during standard refresh cycles.

Related Information

Examples

Example: Create a Calculated Field with the Deployment Agent in Implementation Environments and Customer Central

Example: Troubleshoot a SOAP Error with the Deployment Agent in Implementation Environments

Workday AI Fact Sheet: Deployment Agent

Deployment Agent Skills and Capabilities in Implementation Environments and Customer Central

Deployment Agent Skill	Underlying ASOR Skill	Description
Q&A	Implementation Knowledge	Provides general Q&A support by leveraging official Workday documentation and Community content.
Ask	Tenant Inspection Implementation Knowledge	Grounds the agent's responses with context from your tenant by searching, opening tasks, and running reports. Provides general Q&A support by leveraging official Workday documentation and Community content.

Deployment Agent Capabilities

Deployment Agent capabilities define the specific types of functional assistance and expertise the agent provides to Workday implementers and administrators. These capabilities categorize how the agent practically supports users with system configuration, technical problem-solving, and platform learning.

Enabling all ASOR underlying skills of the Ask skill activates these core agent capabilities:

Capability	Functional Assistance
Configuration Intelligence	• Provides step-by-step instructions for tasks, such as creating calculated fields or linking compensation grades, grounded in your tenant context when the Tenant Inspection skill is enabled. • Offers Configuration Catalog support, including smart package suggestions and assistance with automatic setup of the Configuration Catalog.

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Capability	Functional Assistance
Technical Troubleshooting	• Delivers error interpretation, such as analyzing web service or SOAP errors and suggesting likely resolutions. • Provides logical analysis to help identify why a rule isn't initiating or why a business process isn't behaving as expected.
Knowledge Discovery	• Provides conceptual summaries of complex Workday concepts in layperson's terms, such as explaining *Top of Stack* . • Provides links and citations to Community and Administrator Guide sources to verify information.

Related Information
Tasks
Set Up Deployment Agent in Implementation Environments and Customer Central

Deployment Agent Sample Prompts for Implementation Environments and Customer Central

CRAFT Method for Building Prompts

To ensure more accurate results, use these CRAFT elements to build your prompts: Context

- Role
- Action
- Format
- Tone

Prompt Element	Prompting Tip	Example Prompts
Context	Specify the relevant Workday functional area, module, or project phase. Because the Deployment Agent currently lacks a UI indicator to show when the Ask skill is enabled, include phrases like *in my tenant* to help ensure the agent grounds its response in your actual configuration. When working in Customer Central, explicitly state the name of the connected tenant you want the agent to inspect.	*I am working on Financials in a Phase X implementation.* *In my tenant...* *In my [tenant name] tenant...*
Role	Specify your persona to get context-appropriate advice. Omit the role when the persona is obvious, or you have already established the role earlier in the chat.	*I am a Workday administrator...* *As a configuration specialist,...*
Action	Clearly define the task you need to perform (the how, why, or what).	*...how do I load project budgets in bulk?*

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Prompt Element	Prompting Tip	Example Prompts
Format	Request a specific output format for the information. Omit format if you're comfortable with the default paragraph or step-by-step instructions for how-to questions. Provide the answer in a numbered list of steps.	*Provide the answer in a numbered list of steps.*
Tone	Specify the level of technical detail or the intended audience. Omit tone when you are performing standard technical tasks where the default Workday professional voice suffices.	*Give me a layperson's terms explanation of the concept: Top of Stack.*

Sample Deployment Agent Prompts

Use Case	Sample Prompt
New configuration	*I am an implementer working on Financials. Provide step-by-step instructions on how to create a calculated field that counts Scheduled Weekly Days.*
Troubleshooting errors	*I am getting a SOAP error while using Object Transporter to migrate Payroll data. What are the common causes for this error and how do I fix them?*
Tenant inspection and configuration discovery	*In my tenant, how does this calculated field work: [Calculated Field]* *In my [tenant name] tenant, show me all custom reports created by [User/Security Group].*
Environment verification (Customer Central only, using ASOR-enabled agent)	*What tenants are available to me?*
Learning or refresher	*As a Workday administrator, give me a layman's terms explanation of the 'Top of Stack' concept. Provide the answer in bullet points.*
Optimization	*Suggest best practices for linking Compensation Grades to Job Requisitions to ensure data integrity during a high-volume hiring phase.*

Related Information
Concepts
Deployment Agent in Implementation Environments and Customer Central

Example: Troubleshoot Security Policy and Access Configuration with the Ask Skill

This example illustrates how a security administrator and tenant configuration specialist uses a CRAFT prompt to get assistance from the Deployment Agent Ask skill to diagnose and resolve role-based access issues for specific data fields within a Workday tenant.

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Context

You are a Workday security administrator and tenant configuration specialist. You want to use the Ask skill to troubleshoot why payroll specialists are unable to view specific custom compensation components in your Sandbox tenant. You need tenant-grounded security configuration troubleshooting so that you can:

- Enhance security audit accuracy: Instantly audit domain security policies without manually reviewing dozens of security group permissions.
- Ensure tenant configuration compliance: Verify role-based permissions align with organizational data governance guidelines across testing environments.
- Prevent implementation delays: Swiftly diagnose and resolve data access blockers during end-to-end security and role testing.
- Streamline security administration: Reduce manual effort spent tracing security across complex organizational hierarchies.
- Audit domain permissions: Quickly identify missing view or modify permissions for custom report fields and worker data.

Prerequisites

- Have access to the Implementation, Sandbox, Preview or Customer Central tenant with the Deployment Agent task available in global search. See:
  - Set Up Agent System of Record .
  - Set Up Agent System of Record in Customer Central .
  - Set Up Deployment Agent in Implementation Environments and Customer Central .
- Have the specific error message, code, or security policy ready to query.

Steps

1. Sign in to the Implementation, Preview, Sandbox or Customer Central tenant.
2. Enter *Deployment Agent* in global search and select the **Deployment Agent** task to access the ASOR-enabled Deployment Agent that is tenant-aware (if the Tenant Inspection skill is enabled).
3. Use the CRAFT method to provide a clear prompt that defines your role and the context of your request, including the conditional logic you need.

   Your prompt:

   I am a Workday security administrator. In my tenant, users assigned to the Payroll Specialist role cannot view the 'Bonus Plan Override' field on worker profiles. Please look in my tenant and inspect our security configuration to explain which domain security policy controls access to this field, which security groups currently have View access, and how to update the policy.
4. Review the logic.

   The agent leverages the Ask skill to inspect tenant-grounded configuration parameters and provides targeted security troubleshooting recommendations:

   - Identified domain security policy: *Worker Data: Compensation Explicit*.
   - Current security configuration: The Payroll Specialist (Role-Based) security group is currently missing from the **View** access permissions list for this domain policy.
   - Recommended action: Access the **Edit Domain Security Policy Permits** task, add the payroll specialist to *View* access, and activate pending security policy changes.
5. (Optional) If you are in Customer Central using the **Deployment Agent** task, you can ask how this change could impact another of your implementation tenants if applied there.

   Example prompt:

   How would activating this security policy change impact downstream security group assignments in our impl2 tenant?

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6. Compare the suggested logic against the management level hierarchy of your tenant to verify it captures all levels correctly.

Result

The Deployment Agent identifies the relevant domain security policy and required permissions, which prevents you from having to manually audit role assignments across multiple security screens.

Next Steps

Once the Deployment Agent provides the troubleshooting steps, perform the recommended security updates in the implementation environment to grant the necessary access.

After applying the changes, use the **Thumbs Up** or **Thumbs Down** icon to rate the accuracy of the guidance provided.

Related Information
Reference
Deployment Agent Sample Prompts for Implementation Environments and Customer Central

Example: Troubleshoot a SOAP Error with the Deployment Agent in Implementation Environments

This example illustrates how an integration consultant uses the CRAFT method to get assistance from the Deployment Agent in resolving a SOAP web service error encountered during a migration or integration task.

Context

You are working as an integration consultant to finalize an automated expense-clearing integration. You attempt to use the Submit_Expense_Report web service to migrate data from a legacy travel system into Workday. However, every time your middleware makes a call, Workday returns this SOAP error:

```
Validation error occurred. The field Expense_Report_Data is required.
```

You have already confirmed that the field, **Expense_Report_Data**, is present in your XML. You suspect the error is a false positive, an occasional behavior in Workday SOAP services in which the service triggers a generic error for a parent element when the real issue is a missing child element or a specific security requirement. You have access to Customer Central with the ASOR-enabled Deployment Agent configured in Customer Central.

Prerequisites

- Have access to the Implementation, Preview, or Sandbox tenant with the **Deployment Agent** task available in global search. See:
  - Set Up Agent System of Record
  - Set Up Agent System of Record in Customer Central
  - Set Up Deployment Agent in Implementation Environments and Customer Central
- Have the specific error message or code ready to paste. Example: An error message from a web service.

Steps

1. Sign in to the Implementation, Sandbox, Preview, or Customer Central tenant
2. Enter *Deployment Agent* in global search and select the **Deployment Agent** task to access the ASOR-enabled Deployment Agent that is tenant-aware (if the Tenant Inspection skill is enabled).

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3. Use the CRAFT method to provide clear context and specify your role in your prompt.

   Your prompt:

   I am an integration consultant working on a Financials implementation. I am calling the Submit_Expense_Report web service and receiving a 'Validation error occurred' message regarding a missing field.
4. Continue by describing the technical issue:

   Paste the exact error message and provide details on what you have already verified.

   The error says: 'The field Expense_Report_Data is required.' I have confirmed this field is in my XML. What are the most common hidden missing fields or security issues that cause this specific SOAP fault for this service?
5. (Optional) If the initial answer is broad, refine the request.

   Ask the agent to drill down in to security or business process requirements. Your prompt:

   List the specific functional area and security domain permissions my Integration System User (ISU) needs to initiate this specific web service.

Result

The Deployment Agent provides a list of potential root causes and specific configuration areas to check. It often points you toward the exact field or security permission that is likely causing the failure, saving hours of manual research.

Next Steps

Once the Deployment Agent provides the steps, access the **Create Calculated Field** task to implement the logic. After building the field, use the **Thumbs Up** or **Thumbs Down** icon to rate the accuracy of the logic provided.

Related Information
Reference
Deployment Agent Sample Prompts for Implementation Environments and Customer Central

Example: Create a Calculated Field with the Deployment Agent in Implementation Environments and Customer Central

This example shows how a Deployment Agent user uses a CRAFT prompt to generate logic for a *Conditional Management Level* calculated field.

Context

You are a Workday administrator and configuration specialist. You want to use a calculated field to categorize workers into 2 specific groups, Manager or Individual Contributor, based on your existing management level hierarchy. You need to categorize workers as Manager or Individual Contributor so that you can:

- Enhance custom reporting and dashboards: Use this field to group data in summary reports, enabling executives to see high-level workforce distributions without getting bogged down in dozens of specific job grades.
- Streamline outbound integrations: When you send data to external systems (like an LMS or benefits provider) that only recognize simple management statuses, use this field to map your complex internal hierarchy to the simplified values they require.
- Drive business process condition rules: Use this field to initiate specific workflow steps. For example, you might create a rule that requires an additional approval level only if the worker's status is *Manager*.

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- Automate security group assignments: Use the results of this field to define the scope of constrained security groups or to help automate membership in integration system security groups.
- Perform data audits: Use this field to identify data discrepancies, such as finding individual contributors who are incorrectly assigned as managers of a Supervisory Organization.

Prerequisites

- Have access to the Implementation, Preview, or Sandbox tenant with the **Deployment Agent** task available in global search. See:
  - Set Up Agent System of Record .
  - Set Up Agent System of Record in Customer Central .
  - Set Up Deployment Agent in Implementation Environments and Customer Central .
- Ensure your user account has the necessary permissions to create calculated fields in your target non-Production tenant.

Steps

1. Sign in to the Implementation, Sandbox, Preview, or Customer Central tenant.
2. Enter *Deployment Agent* in global search and select the **Deployment Agent** task to access the ASOR-enabled Deployment Agent that is tenant-aware.
3. Use the CRAFT method to provide a clear prompt that defines your role and the context of your request, including the conditional logic you need.

   Your prompt:

   I am a Workday administrator. I need to create a calculated field on the Worker business object. The logic should be: if a worker's 'Management Level' is 'Manager' or any level above that (like Director or VP), return the text 'Manager'. Otherwise, return 'Individual Contributor'. Can you provide the step-by-step [Format] configuration and the specific calculation type I should use?
4. Review the logic.

   The agent analyzes the request and typically suggests an Evaluate Expression function. It provides the configuration parameters you need to enter in the **Create Calculated Field** task in Workday:

   - **Business Object**: Worker.
   - **Function Type**: Evaluate Expression.
   - **Default Value**: Individual Contributor.
   - **Condition**: Management Level (using an *In Selection List* operator).
   - **Return Value if True**: Manager.
5. (Optional) If your organization uses unique naming conventions, you can ask a follow-up question. Your prompt:

   My tenant uses 'Lead' instead of 'Manager'. How should I update the condition to include 'Lead' and everything above it?
6. Review the suggested logic against the specific management level hierarchy of your tenant to ensure all levels are captured correctly.

Result

The Deployment Agent provides you with the structural logic and specific functions needed for the field. This eliminates the need for you to manually browse the Administrator Guide to determine which calculation type best supports if/then/else text strings.

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Next Steps

Once the Deployment Agent provides the steps, access the **Create Calculated Field** task to implement the logic. After building the field, use the **Thumbs Up** or **Thumbs Down** icon to rate the accuracy of the logic provided.

Related Information
Reference
Deployment Agent Sample Prompts for Implementation Environments and Customer Central

Financial Audit Agent

About Financial Audit Agent

Overview

The Financial Audit agent provides accountants an efficient, automated, and accurate way to provide auditors with high volumes of audit sample requests within the procure-to-pay lifecycle.

The Financial Audit Agent includes these skills:

- Audit Samples and Supporting Documents
- Generate Compilation Package

These skills of the Financial Audit Agent enable you to:

- Quickly and accurately retrieve expense reports, supplier invoices and payments, along with their supporting documents.
- Compile supported documents into an organized package for review and delivery, facilitating prompt audit information request response.

Deployment Considerations

Financial Audit Agent returns only the most recent 45 days of data in non-Production tenants. The agent returns no results for data older than 45 days in non-Production tenants. Workday recommends using a Production tenant to retrieve data that is older than 45 days.

Note: If your non-Production tenant doesn't have any data within the last 45 days, you can refresh the tenant to restore the most recent 45 days of data.

Security Considerations

Financial Audit agent users must have view and modify permissions on the *Audit: Audit Requests* domain in the Common Financial Management functional area.

To search for expense reports, agent users must have access to the *Manage: Expense Report* domain.

To search for supplier invoices, agent users must have access to supplier invoice data through at least 1 of these domains:

- *Process: Supplier Invoice - Reporting* in the Supplier Invoice functional area.
- *Reports: Financial Compliance* in the Common Financial Management functional area.
- *Reports: Supplier Accounts* in the Supplier Invoice functional area.

To search for supplier payments, agent users must have access to supplier payment data through 1 of these domains:

- *Process: Settlement* in the Banking and Settlement functional area.
- *Reports: Supplier Payment* in the Supplier Accounts functional area.

The agent operates on-behalf of the initiator and:

- Retrieves objects that the initiator has access to.

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- Retrieves all applicable supporting documents requested, without evaluation of the initiator's security. However, the initiator's security applies for viewing the supporting documents from the audit request results.
- Has read-only access to the financial dataset.

Agent users can view:

- All audit requests submitted by all users.
- All audit request results but the results that display are determined by the user's security access.

Limitations

The Financial Audit agent currently only supports financial data in the accounts payable, procure-to-pay workflow, which includes supplier invoices and related documents. The agent doesn't have access to Human Capital Management data.

Related Information
Examples
Workday Community: Financial Audit Agent AI Fact Sheet
Workday Community: Financial Audit Agent Adoption Hub

Set Up Financial Audit Agent

Prerequisites

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

1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.

If the value is:

- *UMSA*, the feature is automatically available. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, your organization must opt in to UMSA.

UMSA is required for non-production and production tenants for Workday-Built agents. UMSA is not required for non-production tenants for self-built agents.

For information about how using agents impacts your Flex Credits, see: Workday Flex Credits Community page.

- Set Up Agent System of Record.
- Security:
    - *Agent Management Hub* domain in the Agent System of Record functional area.
    - *Reports: AI Agent Security* domain in the System functional area.

Context

You can set up the financial audit agent so that it can identify and retrieve audit samples for audit requests.

Steps

1. Access the **Agent Management Hub**.

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2. Select the **Unregistered Workday Agents** tab.section of the **Agent Management Hub**, .
3. Click **Register** for the Financial Audit Agent.

   You can only register agents in the products your organization has access to.

   Workday moves the Financial Audit Agent to the **Agent Registry** tab.
4. Select the **Agent Registry** tab and then click the Financial Audit Agent name .
5. Click **Configure Agent**.
6. In the **Status** column, enable each relevant skill.
7. From the **Available To** prompt, select the security groups that you want to make able to access that particular skill.

   Note: Workday evaluates both user access to the agent and the user access to the APIs the agent is executing as tools at runtime. Workday recommends that you evaluate alignment between the security groups in the **Available To** prompt and the security groups that have permissions for the tools the agent might execute. Access the **View Security for Agent Skill** report to view which security policies must be configured for the tool to function.
8. Click **Activate**.

Next Steps

When you finish using the Financial Audit Agent, you can click **Deactivate** to turn it off. You can activate, deactivate and reactivate the Financial Audit Agent at any time in the **Agent Management Hub**.

Financial Audit Agent Sample Prompts

Refer to these examples to help you structure your prompts effectively.

Prompting Tip	Example Prompts
Specify sample context and include details such as document types and invoice numbers for precise responses.	N12: SURL Sample Support. Please provide the support requested for our SURL sample selections. For each sample selection, please provide (1) invoice, (2) payment support vouched to the bank statement, and (3) if not included within the invoice, evidence of the delivery date (e.g. contract). Selected supplier invoices: 10043, 10042, 6685.
Clearly define and use conversational language and keywords as filters. You can use words like quarter, vendor, invoices, and between to add granularity.	Provide supporting documentation for invoices paid in Q4 2024 to the vendor Flower Power.
Specify the parameters for more targeted responses.	Retrieve invoices for the company GMS recorded after 1st January 2026 which exceed $100,000.
Specify a time period of less than or equal to 12 months for faster responses.	Retrieve all supporting documents for supplier invoices over $100,000 for GMS from Jan - Mar 2026.

Example: Create a Compilation Package Using Financial Audit Agent

This example illustrates how to create an audit request package with the Generate Compilation Package skill of the Financial Audit Agent.

Context

You are an accounting professional who has just received a sampling request from your external auditor. You must gather all supporting documentation for a few specific invoices.

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Note: The compilation package only includes invoice attachments with these file types: PDF, CSV, JPEG, PNG, TXT, XLS, and XLSX.

Prerequisites

- Set up the financial audit agent.
- Ensure View access to at least 1 of the documents returned.
- Security: *Audit: Audit Requests* domain in the Common Financial Management functional area.

Steps

1. Access the **Create Audit Request** task.
2. In the **Request Name** field, enter *Ap Cutoff Sample Selection*.
3. In the **Request Details** field, enter:

   Please provide the support request for our AP Cutoff sample selections. For each sample selection, please provide (1) invoice, (2) payment support vouched to the bank statement, and (3) evidence of the delivery date/ date of service, including a contract, if applicable. Selected supplier invoice: INV-2025-09-081.
4. Click **Start Request**.
5. Ensure the **Document Types** the agent selects match this list by clicking **Add Document Type** or the trash can icon:
   - *Supplier Invoice*
   - *Supplier Payment*
   - *Bank Reconciliation*
   - *Supplier Contract*
   - *Receipt*
6. Select **Confirm Types**.
7. Review the **Sourced Documents** the agent selects.
8. Select **Complete Review**.
9. For an invoice, select **Download Package**.
10. Enter *INV 2025-09-081*in the **PDF File Name** field.
11. Click **Next**.
12. Select **Download Package**.
13. Click **Complete Request**.

Result

You've downloaded a compiled audit request sample PDF package that contains all supporting documents for the audit.

Next Steps

Send the PDF package to the external auditor.

Payroll Agent

About Payroll Agent

Payroll Agent is an AI-powered conversational assistant designed to assist with Workday Payroll. It is available to all Workday Payroll countries and includes these skills:

- Core Payroll Data Retrieval, which enables the agent to retrieve basic information about workers, pay groups, companies, and more.

  Note: You must enable this skill for Payroll Agent to be able to use the other skills.

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- Payroll Data Insights, which provides access to payroll knowledge and performs actions for users, involving human intervention when necessary.
- Identify Missing Data and Configuration, which finds missing or outdated critical payroll data that requires intervening action from a payroll practitioner.
- Minimum Wage Analysis, which analyzes the impacts of minimum wage rate changes for states in the U.S. and provinces in Canada.

Note: We recommend that you establish best practices for reviewing, editing, and verifying the accuracy of AI-generated content before use.

Payroll Agent:

- Can respond in the user's local language, matching the language they use in Ask Workday.
- Can display which Workday data sources it queried to produce the answer, giving users transparency into where the information came from.
- Can answer complex or multi-step payroll questions in a single conversation.
- Only retains the last 20 interactions in a given thread.
- Supports file downloads for large queries. When a query returns more than 100 rows (example: Show all workers in the Executive Monthly pay group), the Payroll Agent displays a **Review Request Details** step where you can **Approve** or **Reject** the request to export the large data set to a file. When you **Approve** the request, a **Download** link appears. Click the link to generate a CSV file, which you can then convert to a workbook or download directly. Note that the file limit is currently 10,000 rows .

You can’t use Payroll Agent in proxy sessions.

Some functionalities for the agent's skills are country-specific. Example: You can only use the Identify Missing Data and Configuration skill to find and update expiring FLSA worker period calendars for Payroll for the U.S.

You may receive responses from the agent for questions unrelated to Payroll Agent’s skills.

Set Up Payroll Agent

Prerequisites

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

1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.

If the value is:

- *UMSA*, the feature is automatically available. Keep data contributions enabled to ensure full agent functionality. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, your organization must opt in to UMSA and enable this feature through Innovation Services.

UMSA is required for non-Production and Production tenants for Workday-Built agents. UMSA isn't required for non-Production tenants for self-built agents.

For information about how using agents impacts your Flex Credits, see: Workday Flex Credits Community page.

- Set Up Agent System of Record

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- Security:
  - *Agent Management Hub* domain in the Agent System of Record functional area.
  - *Reports: AI Agent Security* domain in the System functional area.

Context

You can set up the Payroll Agent to enable your payroll practitioners to access and use its skills. The Payroll Agent provides task assistance, information retrieval, and data summarization through conversational AI.

You can also use the Payroll Agent to analyze new minimum wage rates in American states and Canadian provinces. To use the Minimum Wage Analysis skill, you must configure your tenant so payroll administrators have the necessary permissions to access relevant payroll data.

We recommend that you establish best practices for reviewing, editing, and verifying the accuracy of AI-generated content before use.

Steps

1. Access the **Agent Management Hub** report.
2. Select the **Unregistered Workday Agent** tab.
3. On the Payroll Agent row, click **Register**.

   You can only register agents in the products your organization has access to.

   Workday moves the agent to the **Agent Registry** tab.
4. Select the **Agent Registry** tab and then click the Payroll Agent name.
5. Click **Configure Agent**.
6. In the **Status** column, enable each relevant skill.

   You must enable the Core Payroll Data Retrieval skill to use the Payroll Agent and to use the other skills.
7. From the **Available To** prompt, select the security groups that you want to make able to access that particular skill.

   Note: The security groups you select in the **Available To** prompt must also have permissions to the domain or business process security policies that secure the Payroll Agent's tools. You can use the **View Security for Agent Skill** report to assist with your agent security configurations. This report shows you detailed information about the agent's Tools APIs and the respective domain or business process security policies and permissions. At agent runtime, Workday evaluates both user access to the agent and the user access to the APIs the agent is executing as tools.
8. Click **Activate**.
9. (Optional) Set Up Minimum Wage Analysis Skill .
10. (Optional) Set Up Identify Missing Data and Configuration Notifications for Workers Missing Payment Elections .

Result

You can access Workday Chat to use the Payroll Agent.

Next Steps

(Optional) When you are done with the Payroll Agent, you can click **Deactivate** to turn it off. You can activate, deactivate and reactivate the Payroll Agent at any time in the **Agent Management Hub**. When you deactivate an agent, the ASU for the agent also deactivates automatically.

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Related Information
Examples
Payroll Agent Factsheet

Set Up Identify Missing Data and Configuration Notifications for Workers Missing Payment Elections

Prerequisites

Security:*Worker Data: Payroll (Payment Elections)* domain in the Core Payroll functional area.

Context

Workday automatically sends My Tasks notifications to workers missing payment elections when you:

- Enable the Identify Missing Data and Configuration skill for the Payroll Agent.
- Use the agent to initiate the Find Workers Missing Payment Elections job.

By default, Workday sends a notification based on the parent notification type settings configured on the **Payroll** tab of the **Edit Tenant Setup - Notifications** task. See Reference: Edit Tenant Setup - Notifications.

You can also:

- Configure Workday to additionally deliver email notifications to workers missing payment elections.
- Customize the content of the email notifications that workers receive.

To notify workers with email notifications, you must configure the delivery override before you use the Payroll Agent to identify the workers missing payment elections.

Steps

1. Configure a delivery override for email notifications to workers missing payment elections.
    a) Access the **Edit Tenant Setup - Notifications** task.

    Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.
    b) In the **Notification Delivery Settings** section, select the **Payroll** tab.
    c) In the **Notification Type** column, select *Missing Payment Elections*.
    d) Select the **Override Parent Notification Type Settings** check box.
    e) From the **Rule** prompt, select *Create Notification Routing Rule*.
    f) Complete the **Create Notification Routing Rule** section:

Option	Description
Notification Type Usage	Select *Missing Payment Elections*.
Channel Frequencies	Click **Add**.
Channel	Select *Email*.
Default Frequency	Select *Immediately*.

    g) Click **OK**, and then click **OK** again.

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2. View the default email template for notifications sent to workers missing payment elections to verify if you want to make any changes.
    a) Access the **Email Template Behaviors** report.
    b) Select the **Email Template Behavior** column title.
    c) From the **Value** prompt, select *Missing Payment Elections Email* .
    d) Click **Filter**.
    e) Select the *Missing Payment Elections Email* **Email Template Behavior** to view email template behavior.
3. Edit the default email template for notifications sent to workers missing payment elections.
    a) Access the **Create Email Template** task.

    Security: *Set Up: System* in the System functional area.
    b) Enter a name for the template.
    c) On the **Create Email Template** prompt, select *Missing Payment Elections Email*.
    d) Click **OK**.
    e) Add these rows to the grid:

Order	Static or Dynamic Content	Static or Dynamic Content Prompt	Text
1	*Static Content*	*Create Static Email Text* on the **Static Content** prompt	Enter the content you want to display as the header of the notification.
2	*Static Content*	*Create Static Email Text* on the **Static Content** prompt	Enter the content you want to display as the body of the notification.
3	*Dynamic Content*	*Actionable Link* on the **Dynamic Content** prompt	N/A

    f) Click **OK** and **Done**.
4. Verify that the custom email template you created is now active.
    a) Access the **Maintain Email Templates** task.

    Security: *Set Up: System* in the System functional area.
    b) In the **Missing Payment Elections Email** row, confirm the **Active** check box is selected for your custom email template.
    c) Click **OK**.

Result

Workers missing payment elections receive both notifications in their Workday Inbox and email inbox if they set up their email address in Workday.

Set Up Minimum Wage Analysis Skill

Prerequisites

Security:

- *Set Up: Minimum Wage Agent* domain in these functional areas:
    - CAN Payroll
    - USA Payroll

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- *Set Up: Payroll (Minimum Wages View) - CAN* domain in the CAN Payroll functional area.
- *Set Up: Payroll (Minimum Wages View) - USA* domain in the USA Payroll functional area.
- *Set Up: Payroll (Taxes View)* domain in the Core Payroll functional area.

Context

You can use Payroll Agent to analyze new minimum wage rates in American states and Canadian provinces. To use the Minimum Wage Analysis skill, you must configure your tenant according to these steps so payroll administrators have the necessary permissions to access relevant payroll data.

We recommend that you establish best practices for reviewing, editing, and verifying the accuracy of AI-generated content before use.

Steps

1. Enable the *Set Up: Minimum Wage Agent* domain.
    a) Access the **View Domain** report.
    b) From the **Domain** prompt, select *Set Up: Minimum Wage Agent*.
    c) Click the magnifying glass icon next to **Domain Security Policy**.
    d) Click **Edit Permissions**.
    Edit security groups and select the *View* and *Modify* check boxes as needed.
    e) Click **OK** and **Done**.
    f) Activate Pending Security Policy Changes.

    Security: *Security Configuration* domain in the System functional area.
2. Enable the Minimum Wage Background Scheduler.
    a) Access the **Edit Tenant Setup - Payroll** task.
    b) In the **Tax Elections/Taxes** section, select the **Minimum Wage Background Scheduler** check box.
    c) Click **OK** and **Done**.

    When you enable the Minimum Wage Background Scheduler:

    - The Payroll Agent only displays the estimated employer costs of changed minimum wage rates for payroll administrators to view in Workday Chat after 01:00 Pacific Standard Time (PST) the next day.
    - The calculations for the estimated employer costs only include impacted workers who have an hourly plan assignment that enforces minimum wage.

    Security: *Set Up: Tenant Setup - Payroll* domain in the System functional area.

Result

You can enter a query in Workday Chat related to new minimum wage rates, and the Payroll Agent generates analysis on how the new rates impact employer costs.

Payroll Agent Skills

Skill	Description	Limitations
Minimum Wage Analysis	Helps provide you with contextual data analysis and insights related to minimum wage rates and costs. This skill enables the agent to help you review and analyze the impact of minimum wage	This skill is only applicable for the agent for Payroll for the U.S. and Payroll for Canada. Before the Payroll Agent can use this skill, you must configure the necessary data

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Skill	Description	Limitations
	rates changed within the past 6 months or up to 6 months in the future. When you query the Payroll Agent, Workday uses AI to generate analysis on the estimated employer costs and number of impacted employees from new minimum wage rates.	and permissions. See Set Up Minimum Wage Analysis Skill
Payroll Data Insights	Enables the Payroll Agent to access payroll knowledge to answer your questions. You can ask questions and receive answers on the data that you need in a simple conversational manner. Once you've set up the Payroll agent and you're in the assigned security group, you can then click the speech bubble from the top navigation bar to launch Workday Chat.	The Payroll Agent can use this skill to answer only questions about: • Averages • Basic worker pay • Basic pay group pay • Basic pay group information • Earning or deduction inclusion or exclusion • Period comparison • Missing state tax configuration
Identify Missing Data and Configuration	Enables you to: • Streamline payroll processing by finding what data and configurations require your attention. • Monitor and identify outdated or missing data and configurations that are critical for payroll. • Take actions to resolve data and configuration issues such as sending notifications and making updates. You can use this skill to find and notify workers who are missing payment elections based on the rules you configure on the **Payroll Rule on the Maintain Payment Election Rules** task. This functionality is applicable for all Workday Payroll countries. Workday automatically notifies you once the process is complete. You can also use this skill to update FLSA calendars that are set to expire within 90	Before the Payroll Agent can use this skill in your tenant, you must have: • Payment elections for workers. See Steps: Set Up Payment Elections. • FLSA work period calendars. See Create FLSA Work Period Calendars (USA). To find and notify workers missing payment elections, you must: • Configure security access to the *Worker Data: Payroll (Payment Elections)* domain in the Core Payroll functional area. • Configure how Workday notifies workers about missing payment elections. See Set Up Identify Missing Data and Configuration Notifications for Workers Missing Payment Elections. To update FLSA calendars, you must configure security access

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Skill	Description	Limitations
	days of the current date. This functionality is only applicable for Payroll in the U.S. Workday automatically notifies you once the process is complete.	to the *Set Up: Payroll (FLSA) - USA* domain in the USA Payroll functional area.

Planning Agent

Register Planning Agent in Agent System of Record

Prerequisites

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

1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.

If the value is:

- *UMSA*, the feature is automatically available. Keep data contributions enabled to ensure full agent functionality. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, your organization must opt in to UMSA and enable this feature through Innovation Services.

UMSA is required for non-Production and Production tenants for Workday-Built agents. UMSA isn't required for non-Production tenants for self-built agents.

For information about how using agents impacts your Flex Credits, see: Workday Flex Credits Community page.

- Configure SSO with user sync and map user profiles between Workday and Adaptive Planning. See Steps: Configure Adaptive Planning for HCM and Financials.

  Note: If your Adaptive Planning instance is *not* Workday-enabled, then you don't need SSO and user sync. You only require the correct permissions assigned.
- Set Up Agent System of Record .

Context

You can register and configure the Planning Agent in Workday's central agent management framework, Agent System of Record. When you register your agents in Workday, you gain the ability to view data insights, including usage and performance, to analyze and demonstrate the value and impact of your agents. You can use Agent System of Record as a single control center for governance, security, and auditing of all your agents.

The Planning Agent is an intelligent, conversational AI assistant that integrates directly into Adaptive Planning using Ask Workday for Adaptive Planning (Ask Workday). Acting as an on-demand digital analyst, the Planning Agent empowers FP&A professionals, CFOs, and operational managers to interact with complex multi-dimensional models using natural language.

For more information about the Planning Agent, see Concept: Planning Agent in the Adaptive Planning Help Center.

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Steps

1. Access the **Agent Management Hub**.
2. Select the **Unregistered Workday Agent** tab.
3. Click **Register** for the Planning Agent.

   You can only register agents in the products your organization has access to.

   Workday moves the Planning Agent to the **Agent Registry** tab.
4. Select the **Agent Registry** tab and then click **Planning Agent**.
5. Click **Configure Agent**.
6. In the **Status** column, enable each relevant skill.
7. From the **Available To** prompt, select the security groups that you want to make able to access that particular skill.

   Note:

   Workday evaluates both user access to the agent and to the APIs the agent is executing as tools at runtime. Workday recommends that you evaluate alignment between the security groups in the **Available To** prompt and the security groups that have permissions for the tools the agent might execute.
8. Click **Activate**.

Result

You can view data insights into the Planning Agent alongside your other registered agents.

Revenue Contract Agent

Set Up Revenue Contract Agent

Prerequisites

Note:

To register and use agents in the Agent System of Record fully in your tenants, you must sign the Universal Main Service Agreement (UMSA). UMSA is required for non-Production and Production tenants for Workday-Built agents.

To determine your subscription service agreement:

1. Select your profile avatar on Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value. If the value is MSA, you must sign the Universal Main Service Agreement (UMSA).

Flex credits are only required for registering and using agents in your production tenants. You will not be able to register and use any agents in production until you've signed these agreements. UMSA is required for non-production and production tenants for Workday-Built agents. UMSA is not required for non-production tenants for self-built agents.

- Set Up Agent System of Record .
- You must have access to the Workday Contract Intelligence product.
- If you are:
  - An existing Workday Contract Intelligence customer, complete the steps in this topic, submit the Revenue Contract Agent intake form, and add any new users to your existing User

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Provisioning Workspace. See ../../../../authentication-and-security/accounts/User-Provisioning-Workspace/ify1674150353964.dita.

- A new Workday Contract Intelligence customer without a full deployment, submit the Revenue Contract Agent intake form to initiate the tenant setup process, which can take up to 5 days. In the meantime, set up your User Provisioning Workspace. For instructions, see ../../../../authentication-and-security/accounts/User-Provisioning-Workspace/yko1676587449518.dita. After completing the steps, proceed with the steps in this topic.
- A new Workday Contract Intelligence customer with full deployment services, your services team ensures your tenant is set up correctly. Once they complete the setup, proceed with the steps in this topic.

- Security: *Set Up: Revenue Contract Agent* domain in the Customer Contracts functional area.

Context

The Revenue Contract Agent is an AI agent that supports the creation of customer contracts from uploaded documents and provides insights into those contracts. You can register, configure, and activate the Revenue Contract Agent to enable users to extract key data from customer contract documents and populate the data into Workday.

Steps

1. Access the **Agent Management Hub**.
2. Select the **Unregistered Workday Agent** tab.
3. Click **Register** for the Revenue Contract Agent.

   You can only register agents in the products your organization has access to.

   Workday moves the agent to the **Agent Registry** tab.
4. Select the **Agent Registry** tab and then click the agent name.
5. Click **Configure Agent**.
6. In the **Status** column, enable these skills:
   - Revenue Contract Creation
   - Revenue Contract Insights
7. From the **Available To** prompt, select the security groups that you want to make able to access each particular skill.

   Note:

   Workday evaluates both user access to the agent and to the APIs the agent is executing as tools at runtime. Workday recommends that you evaluate alignment between the security groups in the **Available To** prompt and the security groups that have permissions for the tools the agent might execute.
8. Click **Activate**.
9. Access the **Set Up Revenue Contract Agent Configuration** task.
10. Enable or disable the contract header and line fields to specify which fields the Revenue Contract Agent extracts from uploaded documents, using the Revenue Contract Creation skill.
11. Click **OK**.

Result

Workday:

- Displays the **Create from Document** creation option on the **Create Customer Contract** task.
- Enables you to access the **Update with Revenue Contract Agent** task from the related actions menu of existing draft customer contracts.

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- Enables you to ask questions through Workday Chat on the **Edit Customer Contract** task about documents used to create draft customer contracts.

Next Steps

You can:

- Create Contracts From Uploaded Documents .
- Update Contracts With Uploaded Documents .

Related Information
Examples
2026R2 Release Note: Revenue Contract Agent
Workday AI Fact Sheet: Revenue Contract Agent

Create Contracts From Uploaded Documents

Prerequisites

- Set Up Revenue Contract Agent .
- Configure customer contracts. See ../../../../financial-management/revenue/customer-contracts/kev1389208997106.dita.
- Security: *Customer Contract Event* business process and security policy in the Customer Contracts and Project Billing functional areas.

Context

In Workday Financials, you can use Revenue Contract Agent's Revenue Contract Creation skill to automatically generate customer contracts with populated header and line details directly from uploaded signed documents.

Steps

1. Access the **Create Customer Contract** task.
2. In the **Contract Information** section, complete required fields, select the **Create from Document** option, and upload a customer contract PDF file.
3. Click **OK**.
4. Once the processing is complete, click **Edit Customer Contract** in the **Revenue Contract Agent** section of the **Revenue Hub** to review and revise the contract.

   Workday also generates a notification that indicates when processing is complete. You can click the link in the notification to open the generated contract and uploaded document in a side-by-side view on the **Edit Customer Contract** task.
5. Click **Submit**.

Result

Workday routes the customer contract to the *Customer Contract Event* business process for review and approval.

Next Steps

Create:

- Customer billing schedules.
- Revenue recognition schedules.

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Update Contracts With Uploaded Documents

Prerequisites

- Set Up Revenue Contract Agent .
- Configure customer contracts. See ../../../../financial-management/revenue/customer-contracts/kev1389208997106.dita.
- Security: *Customer Contract Event* business process and security policy in the Customer Contracts and Project Billing functional areas.

Context

You can use Revenue Contract Agent's Revenue Contract Creation skill to automatically update an existing draft customer contract with header and line details directly from an uploaded signed document.

Steps

1. From the related actions menu of an existing draft customer contract, select **Update with Revenue Contract Agent**.
2. Upload a customer contract PDF file.
3. Click **OK**.
4. Once the processing is complete, click **Edit Customer Contract** in the **Revenue Contract Agent** section of the **Revenue Hub** to review and revise the contract.

   Workday also generates a notification that indicates when processing is complete. You can click the link in the notification to open the generated contract and uploaded document in a side-by-side view on the **Edit Customer Contract** task.
5. Click **Submit**.

Result

Workday routes the customer contract to the *Customer Contract Event* business process for review and approval.

Next Steps

Create:

- Customer billing schedules.
- Revenue recognition schedules.

Ask Contract Questions With Workday Chat

Prerequisites

- Set Up Revenue Contract Agent .
- Create a customer contract from an uploaded document using the Revenue Contract Creation skill. See Create Contracts From Uploaded Documents .

Context

You can ask questions about contract documents that you used to create draft customer contracts through the Revenue Contract Creation skill within the Revenue Contract Agent. Use Workday Chat for the Revenue Contract Agent on the **Edit Customer Contract** task for draft customer contracts.

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Steps

1. From the related actions menu of a draft contract created with the Revenue Contract Creation skill, click **Customer Contract > Edit**.
2. Click the Workday Chat icon.
3. From the prompt for available agents, select *Revenue Contract Agent*.
4. Ask questions about the contract document in Workday Chat.

   For the best results, use phrases that mention the document. Example: In this contract.

About Revenue Contract Agent

The Revenue Contract Agent extracts and populates data into customer contracts from uploaded documents.

Revenue Contract Agent skills include:

- Revenue Contract Creation: Helps create and update customer contracts, populating details for contract headers and contract lines in Workday from uploaded signed documents.
- Revenue Contract Insights: Enables you to ask questions about the contract PDF you're viewing and receive answers in Workday Chat.

Security Considerations

Security:

- *Customer Contract Event* business process and security policy in the Customer Contracts and Project Billing functional areas.
- *Set Up: Revenue Contract Agent* domain in the Customer Contracts functional area.

Limitations

Revenue Contract Creation:

- Only processes documents in U.S. English.
- Only accepts PDF files for upload.

Workday currently doesn't support Revenue Contract Creation for these contract types:

- Amendment
- Change Order
- Renewal
- Projects

Note: Workday recommends always reviewing the output fields and editing as necessary.

Revenue Contract Insights might:

- Occasionally generate the same response from the previous question. If this occurs, retry your new question.
- Include Evisort metadata or reference values from Evisort fields. Additionally, the agent might reference an "Executed" field when generating a response about the signature status of a document.
- Still display clickable sources in the chat history for questions on previous documents.

Additional Considerations

When you save a contract initially created with Revenue Contract Creation, Workday:

- Populates default values for applicable fields.
- Maintains extracted values even if you change contract line types.
- Overwrites extracted values and repopulates default values only if you update a sales item on the contract.

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Revenue Contract Agent Skills

This topic contains names and descriptions for Revenue Contract Agent skills. The skills refer to actions that the agent can perform.

Skill	Description
Revenue Contract Creation	Creates and updates customer contracts, extracting and populating details for contract headers and contract lines in Workday from uploaded signed documents. See Create Contracts From Uploaded Documents . Revenue Contract Creation: • Extracts relevant information from contracts, such as company and customer details, amounts, dates, and payment terms. • Populates corresponding contract header and line fields in Workday. • Provides an efficient side-by-side review of the generated contract draft with the original document by using highlights and annotations. • Enables manual adjustments and provides the ability to select from additional value suggestions before submission. Revenue Contract Creation generates contracts from contract types such as: • Master Services Agreement • Order Form • Purchase Order (PO) Example: On the **Create Customer Contract** task, you upload a signed PO PDF into Workday. Revenue Contract Creation identifies core PO information, such as the customer name, effective date, amount, and payment terms. It then moves this information to a draft contract on the task, ready for your review and any necessary edits. In a side-by-side view, Workday populates annotated fields based on the data extracted from the PDF. When you select an annotation in the Workday contract, Workday highlights the equivalent text in the corresponding PDF for more efficient reviewing and editing. You can also select the annotations to view pop-ups. The pop-ups provide details on values extracted and populated, such as whether you have edited a value. You can also view, accept, or reject additional suggested values. You can also upload documents to update existing customer contracts in Workday. See Update Contracts With Uploaded Documents .

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Skill	Description
Revenue Contract Insights	Answers questions in natural language about customer contracts and receive context-aware answers on draft customer contracts created with the Revenue Contract Creation skill. See Ask Contract Questions With Workday Chat .

Supported Fields for Revenue Contract Creation

Workday populates applicable fields when you create a customer contract with the Revenue Contract Creation skill. You can use this functionality with all contract line types except for project, prepaid, and intercompany.

Workday supports these fields:

Field	Location
Sold-To Customer	Contract Header
Bill-To Customer	Contract Header
Currency	Contract Header
Effective Date	Contract Header
Contract Signed Date	Contract Header
Contract Name	Contract Header
Contract Description	Contract Header
Contract Amount	Contract Header
Payment Terms	Contract Header
Payment Type	Contract Header
PO Number	Contract Header
Sales Item	Goods and Services Contract Line
Line Item Description	Goods and Services Contract Line
Quantity	Goods and Services Contract Line
Unit of Measure	Goods and Services Contract Line
Quantity 2	Goods and Services Contract Line
Unit of Measure 2	Goods and Services Contract Line
Unit Price	Goods and Services Contract Line
Contract Line Amount	Goods and Services Contract Line
List Unit Price	Goods and Services Contract Line
From Date	Goods and Services Contract Line
To Date	Goods and Services Contract Line
Billing From Date	Goods and Services Contract Line
Billing To Date	Goods and Services Contract Line
Company	Goods and Services Contract Line

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Field	Location
Commodity Code	Goods and Services Contract Line
Sales Item	Usage-Based Contract Line
Line Item Description	Usage-Based Contract Line
Quantity	Usage-Based Contract Line
Unit of Measure	Usage-Based Contract Line
Contract Line Amount	Usage-Based Contract Line
From Date	Usage-Based Contract Line
To Date	Usage-Based Contract Line
Billing From Date	Usage-Based Contract Line
Billing To Date	Usage-Based Contract Line
Company	Usage-Based Contract Line
Commodity Code	Usage-Based Contract Line

Self-Service Agent

About Self-Service Agent

The Self-Service Agent is a conversational AI agent that retrieves and summarizes broad self-service data and takes action on common interactions, such as:

- Updating personal information and requesting time off.
- Managing organizational goals and viewing team learning statuses.
- Viewing organization policy information from knowledge articles stored in Workday.

Workday Chat Interactions

When you activate the Self-Service Agent and enable at least 1 skill, Workday displays the Workday Chat bubble at the top of your tenant and hides the Workday Assistant chat bubble to reduce duplication. When you activate another agent, such as the Payroll Agent, but not Self-Service Agent, Workday might display a chat bubble icon for Workday Assistant and a second chat bubble icon for Workday Chat.

Self-Service Agent responses through Workday Chat support UI elements such as tables and buttons.

You can query Sana and receive responses from the Self-Service Agent when you:

- Activate the Self-Service Agent.
- Enable at least 1 skill.
- Have access to Sana.

Skills and Tools

Skills are specific actions or tasks that an agent can take. Each skill is further made up of tools, which are Workday APIs agents use when executing skills.

The Self-Service Agent skills span varying levels of complexity and intended audiences. Workday makes this distinction in the skill name itself by including these prefixes and suffixes:

- ESS (employee self-service) are skills specifically designed for all employee types.
- MSS (manager self-service) are skills specifically designed for managers.
- Advanced are complex action skills.
- Base are information retrieval skills.

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Skills and Tool Security

While most Self-Service Agent skills are specifically designed for ESS or MSS roles, you can technically add any security group to the **Available To** prompt when configuring skills in **Agent Management Hub**. However, users can't use the tools unless the security access to the underlying APIs that power the tools within a skill is configured.

Examples:

- When you want to make the MSS - Payroll - Advanced skill available to the Management Chain security group, you must ensure the Management Chain security group has access to the domains that the *request_payroll_input* tool is secured to.
- Because some tools are designed only to support direct managers, even when you add a non-manager security group to the **Available To** prompt for the skill, users that don't have access to manager domains won't be able to use tools.

If a skill or tool involves tenant access restrictions, such as multi-factor authentication (MFA), ensure that any security groups that you assign to that skill using the **Available To** prompt are also set up for those same tenant access restrictions so that they are enforced appropriately.

Use the **View Security for Agent Skill** report to view the required and recommended security policies that must be configured for each tool.

Limitations

Self-Service Agent currently doesn't support:

- Contingent workers.
- The ability to hide or require fields using the **Configure Optional Fields** task.
- Additional jobs (multi-position).
- Implementer and proxy accounts.
- Delegated actions. While actions initiated by a delegate through Self-Service Agent might initially appear successful in the chat window, they won't create actual events or requests in the system. When you perform an action in Self-Service Agent and specify that you're acting on behalf of someone else, the agent states that the action can't be performed.
- Data extractions from articles in Sandbox. We recommend using IMPL tenants instead for test cases related to this.
- Reading document attachments on help articles.
- Tokenization in agent, skill and tool descriptions.
- Visibility into My Tasks.

Self-Service Agent might produce slight grammatical and syntactical variations in responses. Additionally, Self-Service Agent's reasoning and responses are non-deterministic and are updated continuously over time, which might result in slightly differing interactions as the agent improves week over week.

Language Support

The Self-Service Agent is optimized and validated for all level 1, level 2, and level 3 languages listed on this page.

While the underlying LLM can communicate in over 30 additional languages and thus, you might interact with the Agent in these languages, Workday doesn't support the same level of verified accuracy or stylistic consistency, such as formal or casual phrasing, provided for its officially supported languages.

Agent Profile

In Agent Management Hub, on the **Agent Registry** tab, you can click Self-Service Agent to open its agent profile.

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On the agent profile, we display these tabs where you can view information related to the configuration, usage, and activity of Self-Service Agent:

- **Overview**
- **Skills**
- **Analytics**
- **Documents**
- **Monitoring**

On the **Monitoring** tab, you can retrieve the session IDs for your agent. You can share these IDs with Workday Support to help troubleshoot issues.

Set Up Self-Service Agent

Prerequisites

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

1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.

If the value is:

- *UMSA*, the feature is automatically available. Keep data contributions enabled to ensure full agent functionality. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, your organization must opt in to UMSA and enable this feature through Innovation Services.

UMSA is required for non-Production and Production tenants for Workday-Built agents. UMSA isn't required for non-Production tenants for self-built agents.

For information about how using agents impacts your Flex Credits, see: Workday Flex Credits Community page.

- To prevent a 14-day waiting period for Self-Service Agent to ingest your policy documents, opt in to the **People Experience > Help** service on the **Innovation Services And Data Selection Opt-In** report before you sing the UMSA or change your data hosting region.
- Set Up Agent System of Record.
- Enable the Graph API Descriptor domain and assign All Users to its security policy.

.

Context

The Self-Service Agent is a conversational AI agent that you can configure to take action on common worker and manager requests, such as submitting support requests and viewing absence information. The actions the Self-Service Agent can take are determined by which skills you enable for the agent. You can specify which Self-Service Agent skills are available and which security groups have access to each skill, enabling you to provide the appropriate level of available actions to the right employees.

Steps

1. Access the **Agent Management Hub**.
2. Select the **Unregistered Workday Agent** tab.

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3. Click **Register** for the Self-Service Agent.
4. Select the **Confirm** check box and click **OK**.
   Workday moves the Self-Service Agent to the **Agent Registry** tab.
5. Select the **Agent Registry** tab and then click **Self-Service Agent**.
6. Click **Configure Agent**.
7. In the **Status** column, enable each relevant skill.

   Note:

   - The Guide skill must be enabled for the Self-Service Agent to operate.
   - You no longer need the Workday Help SKU to enable the Policy Intelligence skill.
8. From the **Available To** prompt, select the security groups that you want to make able to access that particular skill.

   When deciding what security groups to select, consider the best practices in About Self-Service Agent

   Note:

   Workday evaluates both user access to the agent and to the APIs the agent is executing as tools at runtime. Workday recommends that you evaluate alignment between the security groups in the Available To prompt and the security groups that have permissions for the tools the agent might execute.
9. Click **Activate**.
10. (Optional) Create a Custom Global Fallback Message for Self-Service Agent .
11. Click **Save**.
12. (Optional) Configure Self-Service Agent Tools .
    a) (Optional) Configure the **Documents** tab for connecting 3rd party policy sources to the Self-Service Agent.
13. (Optional) Connect a Microsoft SharePoint Account to Self-Service Agent .

Result

Workday displays the Workday Chat icon in the global navigation and removes the Workday Assistant chat bubble to reduce duplication.

Employees who have access to the security groups you specified for each skill and the domain or business process security policy associated with the tools that make up each skill can use that functionality within the Self-Service Agent to complete self-service requests.

Users with access to Sana for Workday can now also query the Self-Service Agent in Sana.

Related Information
Examples
Workday Community: Self-Service Agent AI Fact Sheet

Configure Self-Service Agent Tools

Prerequisites

Set Up Self-Service Agent .

Review which tools a Self-Service Agent skill contains. See: Self-Service Agent Tools .

Context

You can configure specific tools within a Self-Service Agent skill without disabling the entire skill itself.

Considerations when configuring a tool:

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- You can’t assign tools to specific security groups; tools inherit the security groups you’ve configured for the skill.
- Some tools must stay enabled for the agent to function. We indicate which tools can't be disabled by making the **Enabled** toggle unavailable.
- Your subscription cost and skill-level billing remain the same for tools that are still enabled.
- Changes can take up to 5 minutes to take effect for new conversations. A user already in conversation with the agent might not experience the change until they start a new conversation.

Steps

1. Access the **Agent Management Hub** report.
2. From the **Agent Registry** tab, click **Self-Service Agent**.
3. On the **Skills** tab, click **Configure** in the **Tools** column for the skill that you want to configure the tools for.
4. From the **Enabled** column, configure the tools you want to turn on/off.
5. (Optional) In the **Tool Disabled Message** column, configure messages that the agent can use to formulate its response for Self-Service Agent users when they try to access a tool you’ve disabled.

   The agent doesn't return the exact message you configured, and instead uses it to generate its own response. Example: You disable the *view_bonus_history* tool and configure this message: *To view your bonus history, please visit the Bonus Management Portal*. You also provide a link. The agent generates a response based on your message.
6. (Optional) In the **Supplemental Message** column, configure the message that the agent can use along with other responses for specific tools when a Self-Service Agent user accesses the tool.

   The agent doesn't return the exact message you configured, and instead uses it to generate its own response. Example: You enable the *view_bonus_history tool* and configure this message: *For more information on future bonus payments, please visit the Bonus Calculator*. You also provide a link. The agent generates a response based on your message.
7. (Optional) In the **Fallback Message** column, configure the message that the agent uses to formulate responses to Self-Service Agent users when they encounter an issue with their self-service request and the tool fails.

   The agent doesn't return the exact message you configured, and instead uses it to generate its own response. Example: You enable the *initiate_change job_ tool* and configure this message: *We’re currently unable to help you complete a job change using Self-Service Agent. Use the* ***Start Job Change*** *task instead*. You also provide a link. The agent generates a response based on your message.
8. Click **OK**.

Next Steps

The Self-Service Agent completes prompts using the tools you’ve configured.

Create a Custom Global Fallback Message for Self-Service Agent

Prerequisites

Set Up Self-Service Agent .

Context

You can configure a custom message and link that displays for users when all these scenarios are true:

- The tool the user was last interacting with fails or was disabled.
- The Self-Service Agent was unable to find a relevant policy document, or the Policy Search skill was inactive.
- The Self-Service Agent was unable to find a link to a Workday task that could help the user.

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- The Self-Service Agent was unable to route the user to create a case.

The message applies to all skills across the entire agent.

Steps

1. Access the **Agent Management Hub** report.
2. From the **Agent Registry** tab, click **Self-Service Agent**.
3. Click **Configure Agent**.
4. From the **Additional Configuration** column for the **Guide** skill row, click **Create Fallback Message**.
5. Enter the text and optional link to display in the message.
6. Click **OK** and **Done**.

About the SharePoint Connector for Self-Service Agent

This topic describes capabilities, limitations, and best practices related to the Microsoft SharePoint integration with Self-Service Agent.

SharePoint Guidelines Overview

The Microsoft SharePoint Connector only works with SharePoint Online (using M365) and doesn't support on-premises versions, including SharePoint Server Subscription Edition (SE), or legacy versions like 2016 or 2019.

We recommend using a service user account rather than an employee’s account to avoid disconnection in the event of the employee’s departure.

The SharePoint events that are tracked for ingesting updates into Workday are:

- Creating new files in a target folder.
- Deleting files from a target folder.
- Changing file contents or deleting a file..
- Permission changes at the folder or file level

Workday doesn't currently track changes to the SharePoint lists.

Security, Synced Changes, and Architecture

Workday retrieves the policy files and the associated access controls from SharePoint and stores the data inside Workday. We ingest the file contents and permissions so that the Self-Service Agent can provide answers with minimal latency.

We cross-reference the SharePoint file permissions with the user's primary work email address in their Workday profile. When a user doesn't have permission to view a file in SharePoint, the agent won't use it to answer their question. One of the most common reasons that the agent doesn't use a file to answer a user is due to email mismatches between Workday and SharePoint. Ensure that email addresses in Microsoft match what's stored in Workday for your employees.

You must wait at least 24 hours for file modifications to reflect in Policy Intelligence answers. This includes editing content, deleting documents, and adding new files. Permission updates are checked in SharePoint every 3 hours.

We use document hashing to remove duplicate file contents during ingestion. However, as a first version limitation, the system appends all external SharePoint URLs associated with that duplicate content to the metadata. This means that when a user has access to a file variant, the Self-Service Agent might accidentally display a source link to a duplicate folder or site in SharePoint the user doesn't have direct access to. For optimal experience, avoid maintaining identical documents across different folders or filenames.

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The SharePoint connection dialog is directly from Microsoft, and Workday has no access to the data in that dialog. After you complete the process, Microsoft informs Workday that they successfully authenticated you.

We don't support Microsoft custom app registration.

When the Self-Service Agent uses the Policy Intelligence skill to answer a question, it checks for both:

- Help articles (when the Workday tenant has the Help SKU).
- SharePoint files (when it's been configured).

Currently, the agent doesn't prioritize one source over the other.

Workday only ingests the latest version of the file to reduce scenarios where the agent provides outdated information.

Versioning

Ensure the SharePoint service account only has access to major versions that are deemed published. Otherwise, the agent will provide answers from content that isn't ready to be seen by a broader audience.

You can use minor versions for drafts but we don't currently ingest minor versions.

File and Ingestion Limits

The feature is currently optimized to ingest up to 1,000 files totaling 200 MB of content within a 24-hour window. When the number of files you select exceeds 200 MB, Workday won't ingest all of the files and won't indicate which files were and weren't ingested. Ensure you select less than 200 MB of content.

Workday ingests these files types:

- Text files.
- PDF, non-scanned, text-stractable.
- Office files (.docx, .xlsx, .pptx).
- HTML pages, only content embedded inside HTML elements, not dynamically generated through Javascript.

Google file formats (docs, sheets, slides), older Office file formats (.doc, .xls, .ppt), and any file type not listed here are not currently supported.

Files that are password-protected, encrypted or PDFs containing scripting will never be supported.

Files in the SharePoint root site aren't currently ingested and display a status of *unknown*. As a workaround, we recommend moving the files into a folder so that they can sync successfully to Workday.

Content and Capabilities

The SharePoint integration currently supports text extraction only; it can't process or return standalone images, videos, graphs, charts, or complex tables. When a table is present, the raw text will be pulled, but the agent can't perform calculations across columns or rows. To ensure best results, we recommend that you:

- Keep tables short and simple.
- Clearly label table rows and columns.
- Incorporate text from images into articles.

We don't read text formatting with hyperlinks. You must spell out the URLs in the policy files for the agent to provide them in responses. Example:*Go to http://www.mybenefits.com/home for more information.* is the correct URL formatting while *Go to My Benefits portal for more information.* is incorrect.

Because Workday can't follow links in policy documents to answer users questions, if there is important content in linked content, incorporate the information into the main policy document or include the linked document in the ingestion process in the **Documents** tab.

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Language and Region Support

Note: The SharePoint connector is currently unsupported in Japan and India regions. Anyone attempting to configure the SharePoint connector in these regions will receive an error and be unable to complete the configuration.

The SharePoint integration supports all level 1 languages in Workday but doesn't implicitly support the region, meaning the Policy Intelligence skill is unaware of the region for a given policy file. The agent uses the employee's location in Workday to match to results from policies based on semantic search results.

When we ingest the file, we run the file contents through a language classifier and the classifier takes a random sampling of text to identify the language. Based on that classifier's conclusion, we assume 1 language per policy document and tag the entire document based on the dominant language detected. Mixed-language files (Example: An English section within a primarily Spanish document) aren't fully supported and might fail to surface properly for English speakers.

Help SKU and the SharePoint Connector

The SharePoint connector for Policy Intelligence doesn't require the Workday Help SKU. However, if you want to use Workday Help in addition to SharePoint, then the Workday Help SKU is required.

When you don't have the Workday Help SKU, you must configure SharePoint before enabling the Policy Intelligence skill; otherwise, we display an error and the skill won't be enabled.

If you have the:

- Workday Help SKU and don't configure the SharePoint connector, the Self-Service Agent provides answers from your Help articles only.
- SharePoint connector configured and don't have the Help SKU, the Self-Service Agent provides answers from your SharePoint documents only.
- SharePoint connector configured and the Help SKU, the Self-Service Agent provides answers from both. We recommend that you have a single policy in 1 system or the other so that the agent doesn't provide inaccurate answers.

There are no additional costs for configuring the SharePoint connector or for storing policy files in Workday. The Policy Intelligence skill consumes the same amount of Flex Credits irrespective of where the answer came from.

Best Practices

Tables and images: Keep tables short and simple with clearly labeled rows and columns, and incorporate the text from images in their knowledge base articles.

URLs: Spell out the URLs in the policy files so that the agent includes them in a response.

Multilingual support: Keep separate files for each language and each policy. Because the language is identified for the entire document, and not at the paragraph level, when you mix languages in a single file, the answers can be wrong.

Multiregion support: We recommend that you separate policies for each region rather than combining them into a single document. Put the region name in the file title in SharePoint to help the agent identify policies per region. Also, assign security groups based on region so that the agent can provide a more targeted response. Example: *Leave of Absence - Canada.pdf* and *Leave of Absence - United States.pdf*instead of *Leave of Absence - Canada and United States.pdf*.

Related Information
Examples
2026R2 Feature Release Note: Connect Third-Party SharePoint Documents to Self-Service Agent

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About the ServiceNow Connector for Self-Service Agent

This topic describes capabilities, limitations, and best practices related to the ServiceNow integration with Self-Service Agent.

Article Ingestion

Workday ingests ServiceNow Knowledge Article records (kb_knowledge) in the Published workflow state only. Articles in any other workflow state, such as Draft, Review, Retired, or Outdated, are excluded.

Workday ingests the article body from the article text field.

Workday does not ingest article attachments (sys_attachment) or process attachment content to answer worker queries. If an attachment contains critical information required for responses, move the attachment content directly into the HTML body text of a Knowledge Article.

Security and Architecture

Self-Service Agent follows the read access your workers have in ServiceNow, based on the user criteria and roles on your knowledge bases and articles. Workday applies article-level user criteria only when the glide.knowman.apply_article_read_criteria system property is set to true.

Workday identifies ServiceNow users by the email address on their user record, or by their user name if it’s formatted as an email. Users without either aren’t included in the permissions Workday syncs.

Permission changes are checked every 3 hours.

Workday does not support block-level security for Knowledge Blocks (kb_knowledge_block). While embedded Knowledge Blocks are ingested as part of the parent article's rendered text, Self-Service Agent will not enforce block-level User Criteria (Can Read / Cannot Read conditions). Consequently, a worker who lacks access to view a specific Knowledge Block within ServiceNow may still receive answers derived from its content. To secure restricted content, extract the Knowledge Block into a standalone Knowledge Article and apply article-level user criteria.

Workday doesn’t evaluate advanced scripted user criteria or custom fields added to user criteria. Criteria that would grant access grant it to no one, and criteria that would deny access block everyone. To make those articles available, replace them with static user criteria based on groups, roles, departments, locations, or companies.

Help SKU and the ServiceNow Connector

The ServiceNow connector for Policy Intelligence doesn't require the Workday Help SKU. However, if you want to use Workday Help in addition to ServiceNow, then the Workday Help SKU is required.

When you don’t have the Workday Help SKU, you must configure ServiceNow before enabling the Policy Intelligence skill; otherwise, we display an error and the skill won’t be enabled.

If you have the:

- Workday Help SKU and don't configure the ServiceNow connector, the Self-Service Agent provides answers from your Help articles only.
- ServiceNow connector configured and don't have the Help SKU, the Self-Service Agent provides answers from your SharePoint documents only.
- ServiceNow connector configured and the Help SKU, the Self-Service Agent provides answers from both. We recommend that you have a single policy in 1 system or the other so that the agent doesn’t provide inaccurate answers.

There are no additional costs for configuring the ServiceNow connector or for storing policy files in Workday. The Policy Intelligence skill consumes the same amount of Flex Credits irrespective of where the answer came from.

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Best Practices

URLs: Spell out the URLs in the policy files so that the agent includes them in a response.

Content: Because Workday can't follow links in articles, add important linked content to the article itself or connect the knowledge base that contains the linked article.

Connect a Microsoft SharePoint Account to Self-Service Agent

Prerequisites

- Identify your Microsoft Global Administrators. The SharePoint integration uses application permissions that require admin consent in Microsoft Entra. Only Global Administrators can grant admin consent for your organization.
- Ensure a Microsoft Global Administrator is available when you are configuring the connector for the first time so that they can grant admin consent during the course of the set up.
- Set up and enable Agent System of Record and Self-Service Agent:
    - Set Up Agent System of Record
    - Set Up Self-Service Agent

Context

You can enable the Self-Service Agent to use documents in your Microsoft SharePoint account to answer your employee's policy-related questions. Adding SharePoint as a document connector increases the relevancy of Self-Service Agent responses without the need to manually upload your existing documents to Workday.

When you don't have the Help SKU, ensure you connect to SharePoint before enabling the Policy Intelligence skill on the Self-Service Agent so that you don't encounter an error.

Steps

1. Enable the admin consent flow in Microsoft Entra.
   You can use 1 of these methods:
    a. Use a Workday-managed OAuth app. When you connect to SharePoint from Workday, use a SharePoint account that is designated as a service account rather than an individual user's account. This ensures that employee turnover doesn't disrupt agent access or the employee experience.
    b. Use a custom OAuth app. See: Configure a Custom OAuth App for Self-Service Agent Sharepoint Connector .
2. (For the Workday-managed OAuth app only) Grant Admin Consent in Microsoft Entra.
    a) Open a new browser window and access the Sharepoint permissions page.
    b) On the dialog window listing out the permissions, click **Accept**.
3. (For the Workday-managed OAuth app only) Verify that the app permissions were installed.
    a) Open Microsoft Entra and access **Enterprise Apps > Workday SharePoint**.
    b) Click the account name to open the application Overview page.
    c) Click **Permissions**.
    d) On the **Admin consent** tab, confirm that these permissions are listed:

API Name	Claim Value	Type
Microsoft Graph	GroupMember.Read.All	Application
Microsoft Graph	Sites.Read.All	Application
Microsoft Graph	User.ReadBasic.All	Application

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API Name	Claim Value	Type
Microsoft Graph	Files.Read.All	Application
Microsoft Graph	GroupMember.Read.All	Delegated
Microsoft Graph	Sites.Read.All	Delegated
Microsoft Graph	User.ReadBasic.All	Delegated
Microsoft Graph	Files.Read.All	Delegated
Microsoft Graph	User.Read	Delegated
Microsoft Graph	offline_access	Delegated
Office 365 SharePoint Online	Sites.Read.All	Application

4. Initiate SharePoint connection from Workday.
    a) Sign in to Workday as a security administrator.
    b) Access the **Agent Management Hub**.
    c) On the **Agent Registry** tab, click **Self-Service Agent**.
    d) On the **Documents** tab, click **Manage Connectors**.
    e) On the Microsoft dialog, sign in with the SharePoint service account that you intend to use for ingesting the policy files.
5. Select SharePoint files in Workday.
    a) Access the **Agent Management Hub**.
    b) On the **Agent Registry** tab, click **Self-Service Agent**.
    c) On the **Documents** tab, click **Add Documents**.
    d) On the Microsoft dialog, sign in with the SharePoint service account that you intend to use for ingesting the policy files.
    e) Select the files and folders to ingest into Workday.

    Note: Workday is optimized to ingest up to 1,000 files totaling 200 MB of content within a 24-hour window. While you can select more than 200 MB, you can't select more than 1,000 files. Workday won't process beyond 200 MB and does not indicate which files it did not process. The agent cannot provide responses from the files that were not ingested. We strongly recommend that you ensure the total size does not exceed 200 MB. The ingestion can take up to 24 hours to process the files and the associated permissions. Check back later to confirm that there were no errors during the ingestion process. The files will display a *Synced* status once completed.
6. Configure Self-Service Agent Tools .

    Enable the *Policy Intelligence* skill and configure the *search_policy_documents* tool.

    Note: You no longer need the Help SKU to enable the *Policy Intelligence* skill. If you have the Help SKU, the Self-Service Agent will also provide responses from your Workday Help articles.

Result

The Self-Service Agent can now access your SharePoint policy documents and use them to answer questions. Self-Service Agent enforces the SharePoint file security when providing answers.

Next Steps

Test the Self-Service Agent to verify the accuracy of its responses related to the information in your SharePoint policy documents.

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Related Information
Examples
2026R2 Feature Release Note: Connect Third-Party SharePoint Documents to Self-Service Agent

Connect a Microsoft OneDrive Account to Self-Service Agent

Prerequisites

- Identify your Microsoft Global Administrators. The OneDrive integration uses application permissions that require admin consent in Microsoft Entra. Only Global Administrators can grant admin consent for your organization.
- Ensure a Microsoft Global Administrator is available when you are configuring the connector for the first time so that they can grant admin consent during the course of the set up.
- Set up and enable Agent System of Record and Self-Service Agent:
    - Set Up Agent System of Record
    - Set Up Self-Service Agent

Context

You can enable the Self-Service Agent to use documents in your Microsoft OneDrive account to answer your employee's policy-related questions. Adding OneDrive as a document connector increases the relevancy of Self-Service Agent responses without the need to manually upload your existing documents to Workday.

When you don't have the Help SKU, ensure you connect to OneDrive before enabling the Policy Intelligence skill on the Self-Service Agent so that you don't encounter an error.

Steps

1. Enable the admin consent flow in Microsoft Entra.

   When you connect to OneDrive from Workday, use a OneDrive account that is designated as a service account rather than an individual user’s account. This ensures that employee turnover doesn’t disrupt agent access or the employee experience.
2. Grant Admin Consent in Microsoft Entra.
    a) Open a new browser window and access the OneDrive permissions page.
    b) On the dialog window listing out the permissions, click **Accept**.
3. Verify that the app permissions were installed.
    a) Open Microsoft Entra and access **Enterprise Apps > Workday OneDrive**. Click the account name to open the application Overview page.
    b) Click **Permissions**.
    c) On the **Admin Consent** tab, confirm that these permissions are listed:

API Name	Claim Value
Microsoft Graph	GroupMember.Read.All
Microsoft Graph	Sites.Read.All
Microsoft Graph	User.ReadBasic.All
Microsoft Graph	Files.Read.All

4. Enable the *Agent Documents* domain in the Agent System of Record functional area.

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5. Initiate OneDrive connection from Workday.
    a) Login to Workday as a security administrator.
    b) Access **Agent Management Hub > Agent Registry > Self-Service Agent**.
    c) On the **Documents** tab, click **Manage Connectors**.
    d) On the Microsoft dialogue, login with the OneDrive service account that you intend to use for ingesting the policy documents.
6. Select OneDrive document folders in Workday.
    a) Access **Agent Management Hub > Agent Registry > Self-Service Agent**.
    b) On the **Documents** tab, click **Add Documents**.
    c) On the Microsoft dialog, login with the OneDrive service account that you intend to use for ingesting the policy documents.
    d) Select the folders to ingest. You can't select individual documents.

        Note: Workday is optimized to ingest up to 400 MB of content within a 24-hour window. Workday won't process beyond 200 MB and doesn't not indicate which files it didn't not process. The ingestion can take up to 24 hours to process the files and the associated permissions. Check back later to confirm that there were no errors during the ingestion process. The files will display a **Synced** status once completed.
7. Configure Self-Service Agent Tools .

    Enable the *Policy Intelligence* skill and configure the *search_policy_documents* tool.

    When you don't have the Help SKU, ensure you connect to OneDrive before enabling the Policy Intelligence skill on the Self-Service Agent so that you don't encounter an error.

    Note: You no longer need the Help SKU to enable the *Policy Intelligence* skill. If you have the Help SKU, the Self-Service Agent will also provide responses from your Workday Help articles.

Result

The Self-Service Agent can now access your OneDrive document folders and use them to answer questions. Self-Service Agent enforces the OneDrive file security when providing answers.

Next Steps

Test the Self-Service Agent to verify the accuracy of its responses related to the information in your OneDrive policy documents. Example: Ask about a few documents from each document folder, including a restricted document. Ask once as a worker who can read the document in OneDrive and once as a worker who can't.

Connect a ServiceNow Account to Self-Service Agent

Prerequisites

- A ServiceNow administrator who can register an inbound OAuth application in your instance and give the integration account read access to:
    - User criteria (user_criteria and its membership tables) and the knowledge base user criteria tables (kb_uc_*_mtom).
    - sys_user, sys_user_grmember, and sys_user_has_role.
    - The related group, role, department, location, and company tables.
    - The glide.knowman.apply_article_read_criteria and glide.knowman.ownership_group.enabled system properties.

        Self-Service Agent follows the read access your workers have in ServiceNow, based on the user criteria and roles on your knowledge bases and articles. Workday applies article-level user criteria only when the glide.knowman.apply_article_read_criteria system property is set to true.

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- A dedicated ServiceNow integration account to connect with. It needs read access to the knowledge bases you plan to connect, plus the user criteria, users, and groups that control who can read them. Use a dedicated account rather than an employee's account so the connection isn't disrupted when someone leaves.
- Your ServiceNow instance URL, for example https://yourcompany.service-now.com.
- Set up and enable Agent System of Record and Self-Service Agent:
    - Set Up Agent System of Record
    - Set Up Self-Service Agent

Context

You can enable the Self-Service Agent to use documents in your ServiceNow account to answer your employee's policy-related questions. Adding ServiceNow as a document connector increases the relevancy of Self-Service Agent responses without the need to manually upload your existing documents to Workday.

When you don't have the Help SKU, ensure you connect to ServiceNow before enabling the Policy Intelligence skill on the Self-Service Agent so that you don't encounter an error.

Steps

1. Copy the Redirect URL from Workday.
    a) In Workday, access **Agent Management Hub > Agent Registry > Self-Service Agent > Documents > Manage Connectors > Add Connector > ServiceNow**.
    b) Select **Connect > OAuth** and copy the Redirect URL.

    Workday sets this URL based on your data center.
    c) Keep this dialog open while you complete step 2.
2. Register an inbound OAuth application in ServiceNow.
    a) In ServiceNow, access **All > System OAuth > Application Registry** and select **New**.
    b) Select **New Inbound Integration Experience > New Integration > OAuth - Authorization code grant**.

    On newer ServiceNow releases, this form is under **Machine Identity Console > Inbound integrations**.
    c) Enter a name, such as **Workday Self-Service Agent**, and paste the Redirect URL you copied in step 1.
    d) Add the **useraccount** auth scope.
    e) Set **Refresh token lifespan** to a value that meets your security policy.

    By default, ServiceNow refresh tokens expire after 100 days, and the connection then has to be authorized again. You'll need to reconnect from Workday.
    f) Leave the other settings at their defaults and save.
    g) Copy the Client ID and Client Secret.
3. Complete the ServiceNow connection in Workday.
    a) In the ServiceNow connection dialog from step 1, enter your instance URL, Client ID, and Client Secret.
    b) Confirm that the **Redirect URL** and **Permissions** fields match your ServiceNow application.
    c) When ServiceNow prompts you, sign in with the integration account, through your single sign-on provider if you use one, and allow the connection.

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4. Select ServiceNow document folders in Workday.
    a) Access **Agent Management Hub > Agent Registry > Self-Service Agent**.
    b) On the **Documents** tab, click **Add Documents > ServiceNow**.
    c) Workday ingests only the published articles in each knowledge base you select. To keep an article out of answers, ensure it's not published, or move it to a knowledge base you don't select.

    Note: Workday is optimized to ingest up to 400 MB of content within a 24-hour window. Workday won't process beyond 200 MB and doesn't not indicate which files it didn't not process. The ingestion can take up to 24 hours to process the files and the associated permissions. Check back later to confirm that there were no errors during the ingestion process. The files will display a **Synced** status once completed.
5. Configure Self-Service Agent Tools .

    Enable the *Policy Intelligence* skill and configure the *search_policy_documents* tool.

    When you don't have the Help SKU, ensure you connect to ServiceNow before enabling the Policy Intelligence skill on the Self-Service Agent so that you don't encounter an error.

    Note: You no longer need the Help SKU to enable the *Policy Intelligence* skill. If you have the Help SKU, the Self-Service Agent will also provide responses from your Workday Help articles.

Result

The Self-Service Agent can now access your ServiceNow document folders and use them to answer questions. Self-Service Agent enforces the ServiceNow file security when providing answers.

Next Steps

Test the Self-Service Agent to verify the accuracy of its responses related to the information in your ServiceNow policy documents. Example: Ask about a few documents from each document folder, including a restricted document. Ask once as a worker who can read the document in ServiceNow and once as a worker who can't.

Configure a Custom OAuth App for Self-Service Agent Sharepoint Connector

Prerequisites

Set up and enable Agent System of Record and Self-Service Agent:

- Set Up Agent System of Record
- Set Up Self-Service Agent

Context

You can enable the Self-Service Agent to use documents in your Microsoft SharePoint account to answer your employees' policy-related questions. This increases the relevancy of Self-Service Agent responses without the need to manually upload your existing documents to Workday.

When you don't have the Help SKU, ensure you connect to SharePoint before enabling the Policy Intelligence skill on the Self-Service Agent so that you don't encounter an error.

To configure your connector using the Workday-managed OAuth app, see Connect a Microsoft SharePoint Account to Self-Service Agent .

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Steps

1. Register an internal app in Microsoft Entra.
   Enter these values:

Option	Description
Name	Workday - Sharepoint
Support Accounted Types	Any Entra ID Tenant and personal Microsoft accounts.
Redirect URI	a. Select a web platform. b. Enter the redirect URL for your region. The exact value displays in the connection dialog in Workday, with a **Copy** button next to it. Copy it from there and paste it here.

2. Add application permissions and grant admin permissions.
   a) In your app registration, navigate to API permissions in the sidebar.
   b) Select **Add a permission > Microsoft Graph > Application permissions**.
   c) Add these scopes:
      1. Sites.Read.All
      2. Files.Read.All
      3. User.ReadBasic.All
      4. GroupMember.Read.All

      Note: You can skip this step if you've already granted the User.Read.All and Group.Read.All scopes.
   d) Click **Add Permissions**.
   e) On the same API permissions page, click **Add a Permission** again.
   f) Select **SharePoint > Application Permissions**.
   g) Add Sites.Read.All. If you use Permissions API and need to index access granted through link sharing groups, also add Sites.FullControl.All.
   h) Click **Add Permissions**.
   i) Click **Grant Admin Consent for [Company]**.
3. Create a new client secret.
   a) Click **Certificates & Secrets** on the left navigation.
   b) Select **Client secrets > New Client Secret**.
   c) Enter a description. Example: *Workday Client*.
   d) Set expiry for 365 days (12 months).
      You need to renew your client credentials every year before the expiration date.
   e) Click **Add**.
   f) Take note of your Secret ID (Client ID) and Value (Client Secret). These only display once and should be handled securely.
4. Provide your own SharePoint App in Workday.
   a) Access the **Agent Management Hub**.
   b) On the **Agent Registry** tab, click **Self-Service Agent**.
   c) On the **Documents** tab, click **Manage Connectors**.
   d) Click **Provide Your Own Sharepoint App**.
   e) Enter your Client ID and Client Secret from step 3.
   f) Click **Continue** to sign into your SharePoint user account.

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Result

The Self-Service Agent can now access your SharePoint policy documents and use them to answer questions. Self-Service Agent enforces the SharePoint file security when providing answers.

Next Steps

Test the Self-Service Agent to verify the accuracy of its responses related to the information in your SharePoint policy documents.

Self-Service Agent Skills

A Self-Service Agent skill refers to specific actions or tasks that an agent can take. You can specify which actions or tasks you want the Self-Service Agent to be able to perform by setting each skill as either active or inactive.

Note: The **Guide** skill must be set as active for the Self-Service Agent to run.

This topic contains Self-Service Agent skill names and general descriptions. You can also view this information directly in Workday when you configure an agent in the **Agent Management Hub**.

Skill and tool configuration changes can take up to 10 minutes to take effect for Self-Service agent due to caching.

Skill	Description
ESS - Financial Management - Base	Provides employees with the ability to retrieve financial information, including expense history.
ESS - Help - Advanced Skill	Facilitates the action of submitting support requests, enabling employees to move beyond information gathering to active assistance.
ESS - Human Capital Management - Advanced	Enables employees to use Self-Service Agent to take actions related to their workforce lifecycle by updating personal data and requesting reference letters.
ESS - Human Capital Management - Base	Enables the Self-Service Agent to process requests from employees related to retrieving personal information for core HCM functions including worker profiles, compensation and benefits details, and team information.
ESS - Payroll - Base	Enables the Self-Service Agent to process requests from employees related to compensation, payment, and tax forms.
ESS - Payroll - Advanced	Enables employees to use Self-Service Agent to take actions related to complex payroll tasks, such as adding or removing bank accounts, managing tax withholdings, and updating payment elections.
ESS - Talent Management - Advanced	Enables employees to use Self-Service Agent to take actions related to complex workforce tasks, such as submitting performance reviews and creating referrals.
ESS - Talent Management - Base	Provides the Self-Service Agent with the ability to retrieve information related to employee professional development, including goals, feedback history, and internal job listings.

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Skill	Description
ESS - Workforce & Frontline Management - Advanced	Enables employees to use Self-Service Agent to take actions related to complex workforce tasks, such as submitting time-off requests, checking in/out of shifts, entering time blocks and submitting time.
ESS - Workforce & Frontline Management - Base	Provides the Self-Service Agent with the ability to retrieve their time tracking, scheduling, and absence information. This skill handles inquiries such as checking time-off balances and viewing Workday Scheduling schedules. Workers can use this skill to view information about their company holidays, entered and submitted time, time off balances, and events.
Global Search Answers	Enables employees to receive Self-Service Agent's answers to applicable self-service questions directly in global search. Applies to a subset of view-only search queries related to goals, learning, feedback, compensation, dependents, and candidate status. Turning off this skill will return these searches to the current Assisted Search.
Guide	Provides intelligent navigational direction, ensuring task completion by directing users to the specific Workday report or task required.
MSS - Human Capital Management - Base	Enables the Self-Service Agent to process requests from managers related to retrieving essential team information, including team structures, work history, and direct report information.
MSS - Human Capital Management - Advanced	Enables managers to take action on workforce lifecycle transactions for their direct reports, including initiating job changes and executing key organizational updates.
MSS - Payroll - Advanced	Enables the Self-Service Agent to process requests from managers related to initiating financial actions, such as requesting payroll inputs. The skill: • Calls the existing Request Payroll Inputs business process. • Uses your existing payroll and security configuration. • Respects the pay component security segment and domain security that you configure on the Self-Service Agent. The skill focuses on Workday Payroll workers and enforces these key rules:

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Skill	Description
	• Creates payroll inputs only for workers on Workday Payroll. When the worker's primary position is in an external pay group, or the worker has no pay group, the skill blocks the request and returns a message that the worker isn't available for payroll input requests. • For multi-job workers, when a manager requests a position-based input without specifying a position, the skill defaults the input to the worker's primary position effective on the input start date.
MSS - Talent Management - Advanced	Enables the Self-Service Agent to support managers in driving the performance cycle and take actions such as conducting reviews, changing talent data, and executing team development transactions.
MSS - Talent Management - Base	Enables the Self-Service Agent to support managers in overseeing the development of their team by retrieving goal progress, viewing learning statuses and reviewing team feedback.
MSS - Workforce & Frontline Management - Advanced	Enables the Self-Service Agent to process requests from managers related to approving, sending back, or denying submitted time entries.
MSS - Workforce & Frontline Management - Base	Enables the Self-Service Agent to process requests from managers related to retrieving information on team operations, including direct reports' time-off requests, time blocks, and submitted time entries.
Policy Intelligence	Provides the Self-Service Agent with capabilities related to resolving questions about company rules by searching authorized documentation. The skill retrieves specific details from policy documents and procedural guides to ensure responses are compliant and up-to-date.

Providing Feedback on Skills

Currently these skills don't leverage feedback other than by telling the agent to retry if it's inaccurate or to check its work or assumptions. Example: It mistakes today for Monday when today is actually Tuesday.

To provide feedback on the quality of your interactions, click the thumbs up or thumbs down icon. If you click thumbs down, you must provide details. You can either:

- Select from options we provide or select **Something else** to type in your own feedback. When done, click **Submit**.
- Cancel out at any point by clicking the X. We'll still capture your thumbs down selection.

You only see the options for additional feedback on the last response in the chat. If you scroll back up and click thumbs down then you don't get these options.

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Self-Service Agent Tools

Each Self-Service Agent skill is made up of different actions a user can take, called tools. Tools are an abstraction layer over Workday APIs that the agent calls to perform tasks.

This topic contains Self-Service Agent tool names, descriptions, and limitations, grouped by the skill they're associated. You can also access the **View Security for Agent Skill** report to view this information, along with security requirements for each tool.

Skill and tool configuration changes can take up to 10 minutes to take effect for Self-Service agent due to caching.

ESS - Financial Management - Base

Tool	Description	Limitations
find_projects	Enables users to search for projects they have security access to. Users can search by name, Project ID, tenant-configured lifecycle statuses, and project start or end date ranges. Users can also search for opportunity, billable, and non-billable projects. Results return only active projects unless otherwise specified. Results include basic project header information. When the search parameters match a large number of projects, the tool may return a partial list and request that the user refine their search criteria.	
view_expenses	Retrieves and displays expense report line details for an employee, including expense items, amounts, dates, and line statuses. Enables self-service users to look up a specific expense report line directly by its Workday ID or to search for expense lines across all reports. When searching, users can filter by expense item, trip, expense group or line status.	
view_orders	Retrieves and displays the comprehensive details of an employee's purchase requisition, including the status of any associated purchase orders and invoices. Enables self-service users to search for a specific requisition to track its downstream procurement progress.	

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ESS - Financial Management - Advanced

Tool	Description	Limitations
create_manual_expense	Enables workers to manually create expense report lines without uploading a receipt or referencing a credit card transaction by specifying details like expense items, dates, worktags, per diems, and amounts. Supports basic parameters such as expense item, date, quantity, unit cost, currency, and amount. Also supports these expense item attributes: • Memo • Paid by corporate card • Busines reason • Number of days • Departure date • Arrival date • Travel location • Travel country • Country region	Doesn't support complex configurations, mileage route tracking, travel journals or itemizations.
submit_expenses	Enables workers to submit unsubmitted expense lines that are in a ready to submit status, with options to review details or add a memo for the approver.	

ESS - Help - Advanced

Tool	Description	Limitations
create_a_case	Enables users to initiate and submit formal support requests to ensure complex issues are documented and routed correctly for resolution.	

ESS - Human Capital Management - Advanced

Tool	Description	Limitations

add_dependent	Enables workers to add a dependent with details including:
	• Effective Tracking:
	  • Effective Date
	  • Reason
		You must also enable the *change_personal_info* tool in the ESS - Human Capital Management - Advanced skill.

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Tool	Description	Limitations

	• Personal Details:
	  • Legal Name
	  • Gender
	  • Date of Birth (DoB)
	  • Relationship
	  • Citizenship Status
	  • Disability Status
	• Status & Coverage:
	  • Tobacco Usage
	  • Healthcare Covered Elsewhere
	  • Use as Beneficiary
	• Education Tracking:
	  • Full Time Student
	  • Student Start Date
	  • Student End Date
	Initiates a dependent event.	

change_dependent	Enables workers to edit dependent details including:
	• Effective Tracking:
	  • Effective Date
	  • Reason
	• Personal Details:
	  • Legal Name
	  • Gender
	  • Date of Birth (DoB)
	  • Relationship
	  • Citizenship Status
	  • Disability Status
	• Status & Coverage:
	  • Tobacco Usage
	  • Healthcare Covered Elsewhere
	  • Use as Beneficiary
	• Education Tracking:
	  • Full Time Student
	  • Student Start Date
	  • Student End Date
	Initiates a dependent event.
		You must also enable the *change_personal_info* tool in the ESS - Human Capital Management - Advanced skill.

change_home_contact_info	Enables users to update their home address and personal phone number(s) in Workday. Supports custom validations.	Doesn't support file uploads. Managers can't update home contact info on behalf of direct reports.

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Tool	Description	Limitations
change_name	Enables a user to update their legal name and/or preferred name in Workday only. Supports custom validations.	Other name components, such as social name and former name, aren't supported. Doesn't support file uploads such as legal name change certificates. Doesn't support the effective date of a legal name.
change_personal_info	Enables a user to update a combination of their citizenship status, date of birth, ethnicity, gender, gender identity, marital status, nationality, place of birth, pronoun, race, religion or sexual orientation. This tool initiates the *Change Personal Information* business process and enables users to upload attachments.	You must enable View All access and REST initiating action access on the business process security policy. Example: Access the *Change Home Contact Information* business process security policy and add *Employee as self* to both the View All and REST initiating action on the business process security policy to enable users to change home contact information using the agent.
delete_dependent	Enables workers to delete a dependent. Creates a new dependent deletion event. If the worker doesn't provide a date, the event defaults to today's date as the effective date.	Workers can only delete 1 dependent at a time.
request_reference_letter	Initiates a request for a standard employment verification or reference letter for the current user based on data on file in Workday.	Managers can't initiate reference letter requests for direct reports. Doesn't support custom language, non-standard fields, client-specific formatting, or custom validations.

ESS - Human Capital Management - Base

Tool	Description	Limitations
get_benefits_decision_support	Enables workers to request data that assists in the benefits decision-making process based on user input, Workday plan data, and plan eligibility data. Provides answers to questions about benefit plans, retrieves benefit plan definitions, creates comparisons between benefits plans, identifies plans best suited for workers, retrieves changes in plans from prior	You must set up and configure Benefits in your tenant to use this tool. See: Steps: Set Up Benefits. You must ensure that all necessary benefit plan details are accessible to employees through the listed sources. We recommend adding any supplemental benefit plan information that isn't included in the **View Benefit Plan** task or

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Tool	Description	Limitations
	years, and defines complete benefit concepts. The Self-Service Agent retrieves benefit plan information from these sources in your Workday tenant: • Expanded plan details: See: ../../../../human-capital-management/benefits/set-up-employee-benefit-plans/bet1521078353935.dita. • Benefits Knowledge Base articles. See: ../../../../human-capital-management/benefits/set-up-employee-benefit-plans/set-up-knowledge-base-articles.dita and ../../../../human-capital-management/benefits/set-up-employee-benefit-plans/generate-benefit-plan-help-article.dita. Note: To source content from Knowledge Base articles, you must have access to the Workday Help SKU. Knowledge Base articles are not required to use the *get_benefits_decision_support* tool for the Self-Service Agent. • SharePoint documents connected to the Self-Service Agent with the *Policy Intelligence* skill and *search_policy_documents* tool. See: About the SharePoint Connector for Self-Service Agent and Connect a Microsoft SharePoint Account to Self-Service Agent	benefit enrollment instructions, such as deductibles, copays, prescription costs, procedure coverage, and network details, into a policy document for the agent to reference.
get_my_support_roles	Retrieves workers assigned to organization support roles, such as HR Partner and Absence Partner, for organizations you're associated with. Each result includes the assignable role, assigned worker, and	View-only. You can't assign or change support roles. Results include only workers with support roles explicitly assigned to your organizations; inherited roles aren't included. Results depend on your security access

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Tool	Description	Limitations
	organization. You can filter by role type or organization name.	to workers and organizations. Security: *Worker Data: Support Roles* domain, in addition to access to the agent skill.
view_bonus_history	Retrieves historical data for bonuses and one-time payments, such as spot bonuses and gift cards, for the user. Provides payment amounts, currency, effective or scheduled dates, plan names, bonus percentages, and the formal reason for the payment. Supports queries for the most recent payment, a specific calendar year's history, or a summary of the three most recent events. Automatically retrieves all records if multiple payments occur on the same date.	Doesn't display clawbacks, non-bonus plan types, or future/ projected payments.
view_coworker_info	Searches for a coworker by name and/or worker ID to retrieve professional information such as title, manager, location, and, where permitted by the user's security access, personal contact fields such as home email and home phone. Retrieves 1 profile for each call.	The fields that the agent returns depend on the session user's security access. For example, **Home Email** and **Home Phone** fields are returned only when the user has access to those fields. Doesn't return sensitive personal fields, such as home addresses. Ambiguous names with multiple matches requires user clarification. Doesn't support bulk or list lookups.
view_dependents	Retrieves a list of all active dependents for the user, including the dependent's name, relationship type, date of birth, age, gender, and tobacco status.	
view_my_tasks	Secured to *Core Navigation* domain in the Tenant Non-Configurable functional area. Enables users to ask questions about their tasks and returns a read-only list of tasks with a direct link to My Tasks. The Self-Service Agent can call tools in addition to *view_my_tasks*,	Doesn't support translations at this time.

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Tool	Description	Limitations
	such as *find_journeys* and *view_learning_assignments*, to answer time-based questions and provide a comprehensive view of a user's immediate priorities.	
view_my_team	Retrieves the list of users on the current session user's my-team list, including display names and headcount. This tool retrieves peers under the same manager, not the user's direct reports.	Detailed profile information such as title or contact details is not included; use *view_coworker_info* for individual details. Displays an empty team list when the manager has no other direct reports. Doesn't return direct reports; use *view_team_members* for a user's direct reports and peers. .
view_org_info	Retrieves organization records for organizations the user belongs to or from a specific name search. Results include organization identifiers, status, and location fields.	Retrieves org-level metadata rather than a member roster; use *view_my_team* or *view_team_members* for people-level queries. Location and address fields are retrieved as stored in Workday with no locale transformation applied.
view_personal_info	Retrieves personal information details from the session user's personal and employment profile. Not all profile fields are supported even if they exist. This tool retrieves data for the authenticated session user only; use view_coworker_info for other workers. It uses a read-only GraphQL API with no write capabilities.	Doesn't retrieve fields such as emergency contacts or custom profile. Date formats and field labels are retrieved as stored in Workday with no locale-based transformation applied.
view_total_compensation	Retrieves the user's total base pay, total compensation, pay frequency, and compensation grade, pay range details, and a summary of all stock grants grouped by type and the associated vesting schedule.	Doesn't predict future stock vesting dates or format step progression details beyond the provided string.

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ESS - Payroll - Base

Tool	Description	Limitations
get_my_bank_accounts	Enables employees to retrieve and view details across their saved bank accounts by entering natural language prompts to access current payment distribution and direct deposit details.	
get_my_payment_elections	Enables employees to retrieve and view details across their payment elections by entering natural language prompts to access current payment distribution and direct deposit details.	
get_my_payment_election_defaults	Enables employees to retrieve and view details across their default payment configurations by entering natural language prompts to access current payment distribution and direct deposit details.	
get_my_payslips	Enables employees to retrieve and view details for their issued payslips, gross and net pay amounts, and pay period summaries by entering natural language prompts to access current paycheck and earnings information.	
get_tax_elections	Retrieves the current worker's payroll tax withholding elections. Returns the election in effect for each supported tax authority, for each company where the worker is active as of the specified date. If effectiveDate in yyyy-mm-dd format is omitted, returns elections as of the current date. You can filter results to one or more companies using company.	Requires security permissions for the user or integration system under the*Self-Service: Payroll (My Withholding Elections) - USA* or*Self-Service: Payroll (My Withholding Elections) - Canada*domains. Your API client or agent workflow must invoke the *payrollElectionsForESS* resource using the required worker parameter, with optional parameters for Effective Date and Company.

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Tool	Description	Limitations
model_my_pay	Enables hourly workers to model and plan for possible pay change scenarios. Example prompts: • *What if I made x an hour?* • *What is my gross pay if I made x an hour?* • *What is my net pay if I made x an hour?* • *What are my taxes if I made x an hour?* • *What are my pre-tax deductions if I make x an hour?* Retrieves hourly payroll result lines if the pay component includes *rate* and *hour* pay component related calculations. You must configure pay modeling in your tenant to use this tool. SeeSet Up Pay Modeling.	Workers must have at least 1 completed pay period with hourly pay to prompt the agent successfully.
view_direct_deposit	Retrieves user's bank accounts and direct deposit information used in payment elections, including the default country and currency.	Doesn't provide information about payment elections that aren't associated with a bank account.
view_next_paydate	Retrieves the next payroll payment date for on-cycle payments for a user's primary pay group.	Available only for Australia, Canada, France, Ireland, UK, and USA. Additional configuration is required for workers assigned to a Payroll Interface pay group.
view_tax_form_details	Enables workers to query specific box values and access details across U.S. W-2 Wage and Tax Statements (including original W-2 and corrected W-2c forms). Example prompts: • *What is on Box 1 of my W-2 for 2025?* • *What is reported in Box 12 on my W-2?* • *Show me my state and local tax breakdowns on my W-2.* • What is listed under Box 14 on my W-2?	Workers must have at least 1 issued U.S tax form (W-2 or W-2c) to prompt the agent successfully.

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Tool	Description	Limitations
	Enables workers to access year-end tax document details across Canadian tax forms (T4, T4A, T4A-RCA, RL-1, RL-2, and NR4). Example prompts: • *What is on my T4 for 2025?* • *Show me my T4A tax form details.* • *What company is listed on my RL-1??* • What payroll province is on my T4A-RCA?	Workers must have at least 1 issued Canadian tax form (T4, T4A, T4A-RCA, RL-1, RL-2, or NR4) to prompt the agent successfully.

ESS - Payroll - Advanced

Tool	Description	Limitations
add_bank_account	Enables employees to retrieve country-specific account field requirements and submit new bank account details by entering natural language prompts to configure their account information for payroll.	
remove_bank_account	Enables employees to delete unused bank account details by entering natural language prompts, including built-in validation logic to prevent removing accounts currently in active use.	
update_payment_elections	Enables employees to modify payment election distribution rules and account allocations by entering natural language prompts to update their direct deposit preferences.	

ESS - Talent Management - Advanced

Tool	Description	Limitations
create_referral	Enables users to submit a referral for an external candidate to 1 or more job requisitions using job requisition IDs such as candidate's name, country, contact details, optional address, and notes. The specified job requisition ID must be for an active, non-confidential job requisition posted externally. This tool doesn't support resume or file uploads and doesn't	Doesn't support resume or file uploads. Doesn't display referral status after submission. Doesn't support custom validations. Submission might fail when referral consent for certain candidate countries is missing.

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Tool	Description	Limitations
	display the referral status after submission. Additionally, the submission may fail if country-specific candidate consent is missing.	
manage_goals_for_self	Enables the user to create, delete, edit, submit, or archive their own individual goals through the *Manage Goals* business process. The user is shown a summary of the proposed changes to review and confirm before submitting.	Doesn't support saving goals or updating saved goals.
manage_job_history	Enables employees to add, edit, or delete entries in their job history through a conversational interface. When you: • Don’t opt into the Career Profile, employees can use the tool to initiate a *Manage Job History* business process event to change their job history. • Opt into the Career Profile, employees can use this tool to directly update their job history without initiating a *Manage Job History* business process event.	Employees can’t use the tool to: • Take action on in-progress *Manage Job History* events. • Update or remove job history entries with in-progress business process events. If you opt into the Career Profile and inactivate the **Job History** section using the **Configure Career Profile** task, employees can still use this tool to update their job history without using the *Manage Job History* business process. In this case, Workday recommends disabling the tool to enforce approvals and custom validations on the business process.
request_feedback_self	Enables users to request feedback from other users by selecting specific feedback templates and determine whether the responses should be private to them or visible to others.	
start_performance_review_self	Initiates a performance review request through the *Start Performance Review* business process security policy. Enables the user to start a performance review based on a review template and review period start and end dates. Once initiated, you must complete any further interactions through the Workday UI. This tool only	Doesn't support custom validations.

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Tool	Description	Limitations
	supports starting performance reviews for the processing user and review types that allow employee self-initiation.	

ESS - Talent Management - Base

Tool	Description	Limitations
continue_journey	Enables the user to advance through a journey by marking the steps as complete or incomplete.	
distribute_journey	Enables employees to distribute journeys themselves.	
find_internal_jobs	Enables users to search approved internal job postings using job title keyword matching or structured filters such as company, time type, location, remote work type, hiring manager, spotlight job status, management level, job category, job family, job type, and supervisory organization.	Keyword matching is restricted to job titles. Doesn't search full job description text or infer roles from coworker profiles.
find_journeys	Enables users to search, filter, and retrieve available journeys. This tool displays details for self-service and distributed journeys, and provides specific journeys details when prompted.	
view_continue_learning	Enables learners to view active, incomplete learning records, including in-progress standalone lessons and active courses that are in progress or not yet started.	Only returns the learner's records and doesn't include completed learning or transcript history.
view_feedback	Displays feedback the user has received (both unsolicited anytime and requested) along with the status of pending requests. Includes the date, the provider, and the feedback content with options to filter by date or person. Managers can also view a summary count of feedback requests for their direct reports.	
view_learning_assignments	Enables learners to view their open, incomplete, or currently in-progress assigned learning	

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Tool	Description	Limitations
	by due date. Learners must specify if they want required assignments.	
view_learning_content	Enables learners to search and browse active learning content they can access by keyword, topics, skills, content type, language, location, or recent updates.	Doesn't filter results by certification, course offering assessors, course offering locations, rating, or unit type.
view_my_goals	Retrieves submitted individual goals for the user, including status, due date, category, and organization alignment.	Doesn't support date range filtering milestones, or cascaded goals.
view_my_learning_transcript	Enables learners to view learning records from their transcript, including enrolled, in progress, and completed learning content with completion status, dates, scores, and grades. Filters the results by content, completion status, record type, and expiration date.	Only returns learner's records and returns an empty list when no transcript records exist or when viewing the learning transcript is disabled for the learner. Doesn't filter results by registration status, date enrolled, attendance status, grade, score and record type.
view_org_goals	Retrieves an organization's goals for a specified date range, defaulting to the current user's primary-job supervisory organization. Provides goal names, descriptions, completion percentages (0–100), and parent goal references.	Limited to active supervisory organizations. Doesn't support searching by name or description.
view_performance_review	Retrieves the user's completed or in-progress performance reviews. Only retrieves overall ratings for managers and employees for each section. Users can filter the list by status.	Doesn't display the manager or employee's overall comments. Only retrieves overall ratings for managers and employees for each section.
view_recommended_learning	Enables learners to view learning content, including courses and programs, ranked by how well each item matches the learner's profile and learning history. Returns up to 40 ranked items per request.	Returns no recommendations when the organization hasn't enabled the required ML data contributions for learning recommendations, or when no recommendable content is available.
view_talent_profile_details	Retrieves specific talent profile sections, such as job history, skills, and education for the	

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Tool	Description	Limitations
	current user or another worker by their name or ID.	

ESS - Workforce & Frontline Management - Advanced

Tool	Description	Limitations
accept_shift_swap	Secured to the Accept Shift Swap (REST Service) initiating action on the Accept Shift Swap business process in the Scheduling functional area. Enables workers to review, accept, or reject a pending shift swap request proposed by a coworker. Strictly for responding to existing requests.	Doesn't initiate new swaps or display other pending items in the worker's My Tasks.
bid_to_cover_shift	Enables workers to submit a bid to cover an open scheduled shift for themselves. This action submits the bid for manager or scheduler approval and is restricted to eligible scheduled workers.	
call_out	Initiates call out for a set of shifts. This submits a request for time off for those shifts, then contacts the shift managers and initiates the process to fill the shifts.	
call_out_no_absence	Initiates call out for a set of shifts. This contacts the shift managers about those shifts and starts the fill shift process for each, but doesn't submit a request for time off. Used by workers without absence management or when a time off request has failed and the call out should proceed without trying to correct the issue.	
cancel_absence	Users must have access to the *Correct Time Off Entry (REST Service)* initiating action on the *Correct Time Off* business process for the Self-Service Agent to use this tool. Enables workers to cancel or delete an approved time off entry. Also supports the cancellation of in-progress	

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Tool	Description	Limitations
	time off request and correction events.	
change_work_availability	Users must have access to the Change My Work Availability (REST Service) initiating action on the Change Work Availability business process for Self-Service Agent to use this tool. Enables workers to update their work availability by specifying available days of the week and distinct time slots.	This tool only updates availability and can't be used to modify schedule preferences or currently published shifts. Doesn't support overlapping time slots on the same day. Managers can't use this tool to update availability on behalf of workers.
cover_shift	Enables workers to request to cover an open scheduled shift for themselves. Restricted to eligible scheduled workers.	
delete_time_blocks	Enables users to delete time blocks but doesn't enable edits or other changes.	Limited to 50 time blocks and a 1-week date range.
edit_absence	Users must have access to the *Correct Time Off Entry (REST Service)* initiating action on the *Correct Time Off* business process, or the *Request Time Off (REST Service)* initiating action on the *Request Time Off* business process for the Self-Service Agent to use this tool. Enables workers to edit an approved time off entry. Supports modifications to quantity, start and end times, time off type, position, and reasons for both standard time off and absence tables. Supports custom validations.	Doesn't support corrections to worktags. Doesn't display warnings.
enter_time_block	Enables a user to create time entries for 1 or more days using quantity-based entries (# of hours) or in/out time-based entries (specific times of day).	Doesn't support worktag entry or project-based time entry codes. Doesn't support time blocks requiring worktag selection, such as cost center, location, or division.
my_shifts	Enables workers to view their scheduled shifts. Supports retrieving, summarizing, aggregating, sorting, and filtering past or upcoming shifts across custom date ranges, as well as answering targeted	

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Tool	Description	Limitations
	questions like "When is my next shift?"	
open_shift	Enables workers to open their own published shift and place it on the Open Shift board.	
request_absence	Users must have access to the *Request Time Off (REST Service)* initiating action on the *Request Time Off* business process for the Self-Service Agent to use this tool. Enables workers to initiate a: • Leave of absence request. Supports leave of absence requests with additional fields, custom additional fields, and entitlement per event. • Time off request, such as vacation and sick leave.	Doesn't support time off requests with worktags configured, or leave of absence requests with position-based leaves. Doesn't display warnings. Doesn’t account for the configured daily default quantity or the worker’s scheduled hours when proposing time off for hours-based absence types. Doesn’t support adding attachments when requesting a leave of absence or time off. The *request_time_off* tool treats 1 day as 8 hours.
request_shift_swap	Users must have access to the *Request Shift Swap (REST Service)* initiating action on the *Request Shift Swap* business process for the Self-Service Agent to use this tool. Enables scheduled workers to initiate a request to swap one of their published shifts with a qualified coworker. The selected coworker must share a matching schedule tag and belong to the same scheduling organization.	Doesn't post shifts to the Open Shift board or request coverage for open shifts. Restricted to coworkers with matching schedule tags.
shift_check_in	Enables a user to clock in at the beginning of their shift to start recording worked time. The tool automatically resolves available time entry codes and positions.	Doesn't support worktag entry or project-based time entry codes; users requiring worktags can't complete check-in through this tool.
shift_check_out	Enables a user to clock out of their shift, either for a break or for the end of their shift, to stop recording their worked time.	
submit_time	Submits a user's timesheet for review and approval for a single date. Includes all time entries for the full time period the date falls within. For example, any date	Doesn't support custom validations.

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Tool	Description	Limitations
	within a weekly pay period will submit the entire week.	
update_time_block_comment	Adds or updates a comment associated with a specific time block.	Doesn't support editing any other fields on the time block, such as time type or quantity.

ESS - Workforce & Frontline Management - Base

Tool	Description	Limitations
absence_types	Users must have access to the *Request Leave for Self* or *Request Leave of Absence (REST Service)* initiating actions on the *Request Leave of Absence* business process, or the *Request Time Off for Self* or *Request Time Off (REST Service)* initiating actions on the *Request Time Off* business process for the Self-Service Agent to use this tool. Enables workers to view the absence tables, leave types, and time offs they're eligible for and secured to request.	Doesn't support absences and time offs that can't be entered through the standard process, such as those enabled only for time tracking, forfeiture adjustments, or selling.
my_absences	Enables workers to view their past, present, and future time off requests and event details.	Doesn't retrieve cancelled or denied time off entries. Doesn't return leave of absence requests or event details. Doesn't support viewing time off for direct reports or other workers.
time_off_balance	Retrieves and displays the user's time off balances as of an effective date.	Doesn't return time off carryover, expiring accrual balances, or expiration details.
view_holiday_calendar	Retrieves the user's company holiday calendar events for a specified date range.	While the tool identifies the holidays, it doesn't return the specific duration of the holiday calendar event.
view_my_shifts	Enables workers to view their shifts.	
view_my_upcoming_shifts	Enables workers to view all scheduled shifts in the date range, filtering out shifts with existing absence requests or that were previously called out.	

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Tool	Description	Limitations
view_time_blocks	Displays all recorded time blocks for a specified date range for the user.	Results are limited to the first 20 time blocks per request.

Global Search Answers

The Global Search Answers skill uses these tools, which are also available in other Self-Service Agent skills:

- *find_jobs*
- *get_tax_elections*
- *view_bonus_history*
- *view_candidate_status*
- *view_dependents*
- *view_direct_depost*
- *view_direct_reports*
- *view_direct_reports_info*
- *view_feedback*
- *view_learning_assignments*
- *view_learning_content*
- *view_my_goals*
- *view_my_learning_transcript*
- *view_org_goals*
- *view_performance_review*
- *view_tax_form_details*
- *view_team_goals*
- *view_team_learning_status*
- *view_team_performance_review*
- *view_total_compensation*

Guide

Tool	Description	Limitations
get_user_context	Retrieves the user's full name, business title, work location, hire date, and manager. This foundational context is utilized by the agent to deliver more personalized, tailored responses for individual self-service interactions.	
get_page_context	Retrieves the contents of the page the user currently has open on the Workday desktop application. Enables users to ask the agent questions about the page they're on without having to provide page details. This tool is used when the user has both a page open and the	Doesn't apply to mobile or Workday Everywhere.

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Tool	Description	Limitations
	agent chat open on the Workday desktop application.	

MSS - Human Capital Management - Base

Tool	Description	Limitations
get_worker_support_roles	Retrieves workers assigned to organization support roles, such as HR Partner and Absence Partner, for a direct report you specify across organizations the worker is associated with. You can identify the worker by name. Each result includes the assignable role, assigned worker, and organization. You can filter results by role type or organization name.	View-only. You can't assign or change support roles. You can view results only for direct reports you have access to. Results include only workers with support roles explicitly assigned to organizations; inherited roles aren't included. Results depend on your security access to workers and organizations. Security: *Worker Data: Support Roles* domain, in addition to access to the agent skill.
view_direct_reports_info	Retrieves professional profile information, such as anniversary dates, birthdays, promotion history, and tenure, for a manager's direct reports or a specific worker.	Provides data for direct reports only, not skip-level reports. Managers with large teams might experience higher response volume. Depending on an individual's employment record, some fields might not populate.
view_team_members	Retrieves the names of people on the current user's team. If the user has no direct reports, or asks about peers or teammates, returns coworkers who share the same manager, plus the user's manager when available.	For managers, only provides data for direct reports, not skip-level reports. Returns names only. For broader organization hierarchy context, use *view_org_info* instead or consider asking your question in another way. For richer profile data on direct reports, use *view_direct_reports_info* or *view_coworker_info* instead.
view_worker_history	Retrieves employment-related details for events such as hire, job change, and compensation for the user or a named worker within a specified date range. Each invocation retrieves a single event category.	When a name is provided, the worker must be part of the manager's reporting structure. When multiple or zero matches are found for a name, the tool returns an error rather than a list.

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MSS - Human Capital Management - Advanced

Tool	Description	Limitations
initiate_change_ job	Enables the user to initiate a Change Job event using a change job template that includes the Workday Assistant / Rest API initiating action. Automatically chooses the appropriate change job template based on the information the user provides. Collects and submits change job data, or provides a link to a pre-populated Change Job event that users can complete themselves in Workday. Use when a manager wants to initiate a job change such as a change in location, business title, or job profile for a worker. You must configure the *Workday Assistant / REST API* initiating action in the **Select Initiating Actions** field on the **Maintain Change Job Templates** task to use this tool. See ../../../../human-capital-management/staffing/Change-Job/new-change-job/ryf1558646957580.dita for more information. Access the **View Security for Agent Skill** report (secured to the *Manage: Agents* domain in the Agent System of Record functional area and the *Security Administration* domain in the System functional area) to view all security requirements for this tool. These include: • Change Job (Rest Service) initiating action • Staffing Actions: Change Job Date and Reason • Staffing Organizations: Header • Worker Data: Historical Staffing Information	Doesn't support file uploads, and federal or academic detail fields. Provides a link to the Change Job events that require sub-business processes. Doesn't allow you to complete the event in the chat. Example: You're initiating a change job template with the *Change Organization Assignment* business process configured in the **Select Subprocesses for Template** field.

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MSS - Payroll - Advanced

Tool	Description	Limitations
request_payroll_input	Enables managers to identify eligible workers, retrieve available pay components, and submit payroll input requests for eligible team members by entering natural language prompts to streamline payroll input management.	Doesn't support custom validations.

MSS - Talent Management - Advanced

Tool	Description	Limitations
add_goal_to_employees	Managers must have access to the *Cascade Goal (REST)* initiating action on the *Cascade Goals* business process for the Self-Service Agent to use this tool. Enables managers to create 1 or more goals and assign them to multiple employees through the *Cascade Goals* business process for named workers, organization members, or talent pool members.	Doesn’t manage an individual worker's personal goals or view existing goals, and only supports managers with permission to cascade goals; available goal fields depend on tenant configuration.
create_job_requisition	Enables hiring managers and recruiters to create job requisitions for existing filled or unfilled positions, either by selecting an active worker or a worker terminated within 90 days for backfill, or by specifying a position ID. Also enables users to customize requisition details directly in the agent chat session. Completing the chat workflow generates a direct link to review and revise details before submission.	Doesn't support contingent workers.
create_organizational_goal	Enables a manager or authorized user to create a new organizational goal for a specific supervisory organization within a designated goal period. The tool supports defining an optional description, privacy configurations, supporting initiatives, alignment to higher-level organization goals, and metrics for completion tracking.	

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Tool	Description	Limitations
manage_goals_for_worker	Enables a user to create, edit, delete, submit, or archive individual goals for a worker the processing user has access to through the *Manage Goals* business process. The user is shown a summary of the proposed changes to review and confirm before submitting.	Doesn't support saving goals or updating saved goals.
start_performance_review_worker	Starts a new *Employee Review* business process for a manager's single direct report or for their entire team.	While you must select a template and period dates, you can only use 1 template when starting reviews for all direct reports simultaneously. Doesn't support custom validations.
request_feedback_worker	Enables a manager to request feedback about a worker from other users. Users can select specific feedback templates and determine if the responses should be confidential or visible to others.	
update_organization_goal	Enables a manager or authorized user to update the details of an existing organizational goal, including its name, description, privacy settings, higher-level organization alignments, and completion tracking metrics. This tool appends new supporting initiatives to the existing list and allows modifying alignments, but it does not support changing the goal's owning organization or its designated goal period.	

MSS - Talent Management - Base

Tool	Description	Limitations
find_job_requisitions	Enables hiring managers to view job requisition information they have access to. Displays open job requisitions that includes status, supervisory organization, location, and openings filterable by supervisory organization and requisition type (standard or evergreen).	Require proper access for evergreen requisitions. Doesn't support searching or applying for jobs as a candidate.

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Tool	Description	Limitations
	Displays in-progress requisition creation events awaiting approval, showing their current approval stage, filterable by supervisory organization. Access to in-progress events is secured to the *View All* and *View Completed Only* security policies of the *Job Requisition* business process.	
find_my_candidates	Enables managers to retrieve candidate profiles, application stages, and qualification details for job requisitions where they are assigned as the hiring manager. Supports free-text search by candidate name or candidate ID, as well as filtering by application stage, type, skills, job profile, job family, job requisition, experience duration, do-not-hire status, withdrawn status, and closed or frozen job status.	
view_team_goals	Retrieves up to 100 goals for a manager's direct reports, grouped by worker and completion status. Only supports retrieving submitted individual goals and filters for status, keywords, and due dates.	Doesn't support filters for milestones, categories, or specific target and actual currency fields.
view_team_learning_status	Retrieves learning records such as completion, grade, and expiration for a manager's direct team.	Only provides data on learning activities in which the team has already formally enrolled; assigned but not-yet-enrolled training is excluded. Doesn't support filtering by due dates or individual learners.
view_team_performance_review	Retrieves high-level review metadata and overall ratings for the supervisory organization the manager leads.	When a manager leads multiple organizations, only the first supervisory organization is retrieved. Doesn't support non-overall section ratings or comments.

MSS - Workforce & Frontline Management - Advanced

Tool	Description	Limitations
approve_time_entries	Enables a user to approve time entries for multiple workers.	Displays a maximum of 60 records, with 20 records per page.
create_time_blocks_workers	Enables a user to create time blocks for multiple workers.	For a maximum of: • 20 workers. • 100 time blocks.

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Tool	Description	Limitations
		• Date range of 1 week. Doesn't support projects or worktags.
delete_time_blocks_workers	Enables a user to delete time blocks on behalf of workers in bulk. This tool doesn’t enable edits or other changes.	For a maximum of: • 20 workers. • 100 time blocks. • Date range of 1 week.
deny_time_entries	Enables a user to deny time entries for multiple workers.	Displays a maximum of 60 records, with 20 records per page.
edit_time_blocks_workers	Enables a user to edit time blocks on behalf of workers in bulk. They can edit in/out times, quantity, and comment fields. Example: A user can change 07:00-14:00 to 08:00-16:00 or can change a quantity block from 8 hours to 6 hours.	This tool can't edit other fields. Edits a maximum of 10 workers and 50 time blocks.
send_back_time_entries	Enables a user to send back time entries for multiple workers.	Displays a maximum of 60 records, with 20 records per page.
shift_check_in_workers	Enables managers to check in 1 or more workers on their team or direct reports at the current time, at a specified time in the future, or for a previous date. When you specify time entry codes, managers can apply different codes for different workers in the same request. Workday excludes workers who aren't eligible to check in, such as hours-only workers, and returns partial results when a bulk request includes ineligible workers. Workday requires manager confirmation before creating check-in time clock events.	Doesn't enable check-out, edits, deletions, or time transfers.
shift_check_out_workers	Enables managers to check out 1 or more workers on their team or direct reports for the day, for a meal, or for a break at the current time or at a specified time. Managers can check out their entire team or direct reports in a single request. Workday creates check-out time clock events for workers who are eligible for the requested out	Doesn't doesn't enable check-in, edits, deletions, or time transfers.

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Tool	Description	Limitations
	type, and returns partial results when a bulk request includes ineligible workers or out types a worker can't use. Workday requires manager confirmation before creating check-out time clock events.	

MSS - Workforce & Frontline Management - Base

Tool	Description	Limitations
view_my_direct_reports_absences	Enables managers to view time off event details for their direct reports.	Doesn't reference your team absence configuration. Doesn't retrieve cancelled or denied time off entries. Doesn't support viewing time off for workers who aren't direct reports or matrix reports of the manager.
view_submitted_time_entries_workers	Retrieves submitted time entries for multiple workers.	Displays a maximum of 60 records, with 20 records per page.
view_time_blocks_workers	Retrieves time blocks for multiple workers.	Displays up to 100 time blocks for a maximum of 20 workers for a maximum date range of 1 month. Doesn't display project time entry details.
view_time_clock_events	Enables managers to view time clock events for workers on their team or direct reports, including check-in, check-out, meal, break, and out-for-lunch punch history. Managers can ask who on their team is currently checked in or out, retrieve event history for a date or date range, and filter by event type or worker.	This tool retrieves time clock event data only and doesn't enable edits, additions, or deletions. Limited to 20 workers, 100 time clock events, and a 31-day date range per request. When a query exceeds these limits, Workday returns a partial list and indicates that more records are available.

MSS - Workforce & Frontline Management - Premium

Tool	Description	Limitations
confirm_or_reject_shift	When a manager gets worker recommendations for a shift, this tool contacts a chosen worker to request that they pick up the shift. If a different worker was offered the same shift with this	

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Tool	Description	Limitations
	tool, it rescinds the offer from that worker to make it to the new replacement worker.	
get_next_worker_recommendations	Gets recommended workers for an open shift. If the agent has already gotten workers for this shift, it will fetch recommendations again and move past the previously recommended workers.	
post_open_board	Posts the shift to the Open Shift board and closes the fill shift process.	

MSS - Workforce & Frontline Management - Utility

Tool	Description	Limitations
reassign_shift	Reassigns the shift to the worker who has agreed to cover a shift that the original worker has called out for and closes the fill shift process.	

Policy Intelligence

Tool	Description	Limitations
search_policy_documents	Retrieves company policy and procedural information from Help Knowledge Base articles to ensure responses are accurate and based on official documentation. We recommend that you opt in to the **People Experience > Help** service on the **Innovation Services And Data Selection Opt-In** report before you sign the UMSA or change your data hosting region. This prevents a 14 day waiting period for Self-Service Agent to ingest your policy documents.	Doesn't extract data from articles in Sandbox environments. We recommend using IMPL tenants instead for test cases related to this. Doesn't read document attachments or linked documents in help articles. Only reads the text of the article itself.

Related Information
Examples
2026R1 Feature Release Note: Journeys and Onboarding Plans for the Self-Service Agent Experience
2026R2 Feature Release Note: Continue Journeys Tool for the Self Service Journeys Experience

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Self-Service Agent Sample Prompts

Employee Prompts

Use Case	Sample Prompts
Human Capital / Personal Info	• What's my hire date and time in job history? • Show me my personal information. • Show me my org and my team. • Change my legal name. • Update my marital status. • Request a reference letter.
Compensation	• What is my total compensation, including salary, bonus, and additional pay? • Show me my retirement savings.
Knowledge Article Search	What's the maternity leave policy?
Benefits	• I'm having a baby soon, what do i do? • Show me my dependents. • Show me my healthcare elections. • Does my medical or EAP cover free counseling sessions? • Can you create a case for me asking for this information? • Can you help me choose the best medical plan? • What vision plans are available, and what do they cover? • What's the difference between a DMO and a PPO? • What's the difference between these 2 medical plans? • What's changed since my previous enrollment?
Payroll	• Show me my last payslip. • Show me my pay information. • When is my next pay date? • Show me my direct deposit details. • Show me my W-2. • Show me my W-4 elections. • Show me my tax elections. • Compare my current payslip to my last payslip. • Can you show me my gross-net pay difference at my current position and salary if my primary residence is in Georgia or Florida. • Can you look at the November and December payslips from 2025 and tell me what's different? Can you put that into a table format?

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Use Case	Sample Prompts
	• Can you show me the dates and amounts of any bonuses or one-time payments I've received?
Time off / Time Tracking	• Show me my time off balance. • Show me my upcoming time off. • Show me all of my time off history. • Show me my holiday calendar. • I want to request time off on [date range]. • Submit my time for this week.
Talent / Career / Learning	• Show me my personal goals. • Show me my org goals. • Show me my performance review. • Show me feedback I've received. • Show me feedback requests for me. • Show me my talent profile. • Find open jobs that match my profile. • Show me my learning content. • Create a new personal goal. • Start my performance review. • Create a referral for [Candidate Name].

Manager Prompts

Use Case	Sample Prompts
Team	• Based on my team PTO and schedule.. What is the best day to take off in the next 2 weeks? • Show me hire, promotion, and anniversary dates for my team. • What birthdays are coming up on my team? • Optional next step: Request gift card for one of these teammates.
Request Pay Input	I gave [Worker's Name] a $50 gift card on [Date].
Talent / Recruiting / Learning	• Show me candidates for [Requisition Number]. • Show me learning progress for my team. • View [Worker's Name]'s Talent Profile. • What are my team's current goals and their progress?

Admin Prompts

Use Case	Sample Prompts
Tenant questions	• What can the Self Service Agent do in this tenant? • Which tools and domains does the Self Service Agent use?

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Travel Agent

About Travel Agent

Travel Agent is a conversational AI agent that enables you to search, book, and modify flights, hotels, and ground transportation. The assistant guides you through complex itineraries, presents tailored booking options using generative AI, and enforces policy controls interactively. It also answers questions about company travel policy, such as cabin class limits, spending thresholds, advance booking requirements, and approval rules. It searches your company Knowledge Base and returns the most relevant article excerpts with links to their source articles.

Language Support

The Travel Agent is optimized and validated for English.

While the underlying LLM can communicate in over 30 additional languages and thus, you might interact with the Agent in these languages, Workday doesn't support the same level of verified accuracy or stylistic consistency, such as formal or casual phrasing, provided for its officially supported languages.

Related Information
Examples
2026R2 Feature Release Note: Travel Booking and Travel Agent
Workday Community: Travel Agent AI Fact Sheet

Set Up Travel Agent

Prerequisites

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

1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.

If the value is:

- *UMSA*, the feature is automatically available. Keep data contributions enabled to ensure full agent functionality. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, your organization must opt in to UMSA and enable this feature through Innovation Services.

UMSA is required for non-Production and Production tenants for Workday-Built agents. UMSA isn't required for non-Production tenants for self-built agents.

For information about how using agents impacts your Flex Credits, see: Workday Flex Credits Community page.

- Set Up Agent System of Record.
- Set Up Travel Booking

Context

Travel Agent is a conversational AI agent that enables you to search, book, and modify flights, hotels, and ground transportation. The assistant guides you through complex itineraries, presents tailored booking options using generative AI, and enforces policy controls interactively.

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It also answers questions about company travel policy, such as cabin class limits, spending thresholds, advance booking requirements, and approval rules. It searches your company Knowledge Base and returns the most relevant article excerpts with links to their source articles.

Steps

1. Access the **Agent Management Hub**report.
2. Select the **Unregistered Workday Agent** section.
3. On the **Travel Agent** row, click **Register**.

   You can only register agents in the products your organization has access to.

   Workday moves the Case Agent to the **Agent Registry** tab.
4. Select the **Agent Registry** tab, and then click the Travel Agent name.
5. Click **Configure Agent**.
6. On the **Status** column, select each relevant skill you want to enable.
7. In the **Available To** column for each skill, select the security groups that you want to access that skill.

   Example: For the **Conversational Travel Agent**, select the *Employee as Self* security group to provide all employees with access to this skill.

   Note: Workday evaluates both user access to the agent and the user access to the APIs the agent is executing as tools at runtime, so Workday recommends that you evaluate alignment between the security groups in the **Available To** prompt and the security groups that have permissions for the Tools the agent might execute. Use the **View Security for Agent Skill** report to view detailed information about the agent's tool APIs and the respective domain or business process security policies and permissions.
8. Click **Activate**.

Result

- Workday displays the **Travel Agent** in the **Travel & Expense Hub** for you and your employees.
- Employees who have access to the security groups you specified for each skill and the domain or business process security policy associated with the tools that make up each skill can use the **Travel Agent**.

Example

Next Steps

Related Information
Examples
Workday Community: Travel Agent AI Fact Sheet

Travel Agent Skills

A Travel Agent skill refers to specific actions or tasks that an agent can take. You can specify which actions or tasks you want the Travel Agent to be able to perform by setting each skill as either active or inactive.

This topic contains Travel Agent skill names and general descriptions. You can also view this information directly in Workday when you configure an agent in the Agent Management Hub.

Skill	Description
Conversational Travel Agent	Enables users to search, book, and modify flights, hotels, and ground transportation using an AI-

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Skill	Description
	driven conversational assistant. The assistant guides users through complex itineraries, presents tailored booking options using generative AI, and enforces policy controls interactively.

Related Information
Examples
Workday Community: Travel Agent AI Fact Sheet

Travel Agent Tools

Each Travel Agent skill is made up of different actions a user can take, called tools. Tools are an abstraction layer (facade) over Workday APIs that the agent calls to perform tasks.

This topic contains Travel Agent tool names, descriptions, and limitations, grouped by the skill they're associated. You can also view this information - along with security requirements for each tool - directly in Workday by accessing the **View Security for Agent Skill** report.

Conversational Travel Agent

Tool	Description	Limitations
get_user_context_tool	Retrieves the user's traveler profile, including name, work email, phone, home city, job title, organization, date of birth, and gender. Enables users to search and book flights, hotels, and cars; this operation is read-only and doesn't create or modify profile data.	Saved travel preferences or loyalty programs are retrieved separately.

Related Information
Examples
Workday Community: Travel Agent AI Fact Sheet

Talent Sentiment Agent

Setup Considerations: Talent Sentiment Agent

You can use this topic to help make decisions when planning your configuration and use of the Talent Sentiment Agent. It explains:

- What the agent is and the business benefits of using it.
- Security requirements and configuration options.
- Data flow and visibility considerations.
- Current limitations.

What It Is

The Talent Sentiment Agent is a conversational AI agent that uses a large language model (LLM) to provide people leaders with insights based on employee feedback. It analyzes score and comment data to generate context-aware insights, presented as either critical or positive.

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Business Benefits

- Helps leaders make business decisions based on employee feedback data.
- Combines multiple data sources, including scores and comments, into unified insights.
- Enables managers to ask questions about their survey data in natural language to understand the reasons behind specific team sentiments.
- Ranks insights by urgency and impact to help managers focus on what needs attention first.

Use Cases

- A manager uses the agent to quickly identify why engagement scores dropped in a specific round by querying the associated comments.
- A leadership team uses generated insights to identify successful trends in one department that can be replicated across the organization.
- An HR Business Partner uses free-text questions to explore underlying sentiment in complex segments.

Questions to Consider

Questions	Considerations
Who should have access to the agent?	You can give access to the entire company or only to specific access control groups. For each group, you can separately give access to receive automated round insights and to chat with the agent.
What data should the agent analyze?	The agent respects existing dashboard access rights. For the best results, give managers access to comments, topics, scores, and segments.
What languages does the agent support?	If AI Comment Translations are enabled, the agent translates insights into each user's dashboard language. Otherwise, the agent generates insights in English.
How many Flex Credits will the agent use?	Credit usage depends on 3 factors: • the number of contexts that receive automated round insights • the number of survey rounds you run • how often users chat with the agent For more information, see Flex Credit Usage.
Which contexts generate insights?	The agent generates insights for each eligible context, such as the Company context and each manager's *"All reports"* and *"Direct reports"* contexts. The agent only generates insights for contexts that meet visibility thresholds.
How can I control credit usage?	Use access control groups to decide who receives automated round insights and who can chat with the agent. You can select each option separately for each group. For more information, visit Talent Sentiment Agent Insight Generation and Costs .

Recommendations

- Give managers access to all relevant data, such as scores, comments, and segments. If managers don't have permission to view this data, the agent can't answer some of their questions.
- For details about the model and Responsible AI protocols, see the AI Fact Sheets on Workday Community.
- Estimate your Flex Credit usage before you enable the agent, based on your number of managers, survey frequency, and expected chat usage.
- Consider starting with a pilot access control group, then expanding access.
- Only regenerate insights when necessary, because regeneration uses Flex Credits.

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Requirements

- Register the agent in the Workday Agent System of Record (ASOR). For more information, see Register and Configure Workday-Built Agents.
- Workday AI agents require the use of Workday Flex Credits. For more information, see this Community article.
- You must enable third-party data processing at the company level before you set up access control groups.

Flex Credit Usage

The Talent Sentiment Agent uses Workday Flex Credits when it:

- **Generates automated round insights**. The agent generates insights for each context at the end of each survey round. A manager usually has 2 contexts: *"All reports"* and *"Direct reports"*. A manager can have more contexts if your company uses multiple employee-type attributes. Example: If your company uses both Manager and Director attributes, a manager can have 4 contexts.
- **Responds to chat messages**. The agent only uses Flex Credits for successful replies. Errors don't use Flex Credits.
- **Regenerates insights** when an administrator requests it.

The agent doesn't generate insights, and doesn't use Flex Credits, for contexts that don't meet visibility thresholds.

Example: Your company has 200 managers in access control groups with Receive automated round insights selected, and you run 4 survey rounds a year. Each manager has 2 contexts, so the agent can generate insights for up to 401 contexts each round: 400 manager contexts plus the Company context. Over a year, that's up to 1,604 insight generations. The actual number is lower if some contexts don't meet visibility thresholds. Chat messages and regenerated insights use additional Flex Credits.

An administrator can regenerate insights for a context only when:

- The segment meets visibility thresholds.
- The aggregated participation is more than 25%.
- At least 30% of the employees from the segment are in the survey round.

For Flex Credit rates, see Flex Credits in Workday Community.

Limitations

Workday Peakon Employee Voice only generates insights for the Company context, *My Team (All reports)*, and *My Team (Direct Reports)* contexts. The **Overview** page is available in all contexts, but insights display only in these contexts.

Tenant Setup

You enable the agent for your whole organization with a single check box in **Administration > Account > Data control > Third-party data processing**. This check box enables the agent and all of its skills together. When you enable the agent, your organization also gets the new **Overview** page, which is available in all contexts. You can't enable individual skills at the company level. Instead, you control access to each skill through access control groups. Other agent settings, such as regenerating insights, are in **Administration > Sentiment agent**.

Security

You need Administrator access in Workday Peakon Employee Voice to enable the agent, set up access control, and regenerate insights.

Access control groups determine which users can use the agent. In the **Sentiment Agent** section of each group's settings, you can select these check boxes:

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- **Receive automated round insights**: Users automatically get new insights for the *All reports* and *Direct reports* contexts when a survey round closes.
- **Chat with Talent Sentiment Agent**: Users can chat with the agent to ask questions about dashboard data and find deeper team trends.

For the Administrators group, these check boxes are selected by default and you can't clear them. For Managers and all other groups, they're cleared by default. To select these check boxes, the group must also have **Access statistics** enabled.

Users see the **Explore** button only when they have access to **Receive automated round insights** and **Chat with Talent Sentiment Agent**.

Connections and Touchpoints

You register the agent in the Workday Agent System of Record (ASOR). The agent's settings display in ASOR, but you enable the agent and manage access to it in Workday Peakon Employee Voice.

Related Information

Concepts

Talent Sentiment Agent

Talent Sentiment Agent Insight Generation and Costs

Tasks

Set Up Talent Sentiment Agent

Regenerate Talent Sentiment Agent Insights

Set Up Talent Sentiment Agent

Prerequisites

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

1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.

If the value is:

- *UMSA*, the feature is automatically available. Keep data contributions enabled to ensure full agent functionality. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, your organization must opt in to UMSA and enable this feature through Innovation Services.

UMSA is required for non-production and production tenants for Workday-Built agents. UMSA is not required for non-production tenants for self-built agents.

For information about how using agents impacts your Flex Credits, see: Workday Flex Credits Community page.

- Review setup considerations for the Talent Sentiment Agent.
- Register the agent in the Workday Agent System of Record (ASOR). For more information, visit Register and Configure Workday-Built Agents .
- Security: *Administrator* access.

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Context

Set up the Talent Sentiment Agent to generate insights for your people leaders. You enable third-party data processing for your organization and then give access control groups permission to use the agent. To restrict insight generation and control Flex Credit costs, clear these permissions before a survey round closes.

Steps

1. Enable company-level data processing.
    a) Go to **Administration > Account > Data control**.
    b) In the **Sentiment agent** section under **Third-party data processing**, select the **Enable Sentiment agent** check box.

    This check box enables the agent and all of its skills, and also turns on the new **Overview** page in all contexts.
2. Give an access control group access to the agent.
    a) Go to **Administration > Access Control**.
    b) Select an access control group, such as Managers.
    c) In the **Sentiment Agent** section, select the **Receive automated round insights** check box.

    To select this check box, the group must have **Access statistics** enabled.
3. (Optional) Give the group access to conversations with the agent.
    a) Select the **Chat with Talent Sentiment Agent** check box to let users ask the agent follow-up questions about team insights.

    Note: The **Chat with Talent Sentiment Agent** check box requires the **Receive automated round insights** check box. Users see the **Explore** button only when they have the **Chat with Talent Sentiment Agent** check box.
4. Confirm settings.
    a) Click **Save changes**.

Result

When the next survey round closes, managers in the groups you set up can view the agent's insights on the **Overview** page.

Related Information
Concepts
Talent Sentiment Agent
Setup Considerations: Talent Sentiment Agent

Regenerate Talent Sentiment Agent Insights

Prerequisites

- Review setup considerations for the Talent Sentiment Agent.
- Security: *Receive automated round insights* access permission.

Context

Workday Peakon Employee Voice generates Talent Sentiment Agent insights automatically when a survey round closes. You can regenerate insights for a segment manually, such as after you update employee data, so that the insights reflect the latest feedback for that segment. Only users with the necessary access control permissions can regenerate insights. Regenerating insights uses Workday Flex Credits.

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Steps

1. Go to **Administration > Sentiment agent**.
2. In the **Regenerate insights** section, select a segment in the **Segment** prompt.
3. Click **Regenerate**.

Result

Workday Peakon Employee Voice regenerates the agent's insights for the segment you selected.

Related Information
Concepts
Talent Sentiment Agent Insight Generation and Costs

Talent Sentiment Agent

Overview

The Talent Sentiment Agent uses a large language model (LLM) to generate insight cards. The agent bases these insights on the scores and comments that employees provide during the current survey round.

Insights adhere to these key standards:

- All summaries and facts derive from employee comments and scores.
- The agent ranks insights so the most critical information appears first.
- The agent delivers content in a tone suitable for a corporate environment.

Insight Generation Process

The agent follows these steps to generate insights:

- Analyzes the emotional tone (positive, negative, or neutral) of every employee comment and score.
- Identifies critical themes, entities, and specific pain points within the feedback.
- Combines these elements into a ranked list of insights based on urgency and impact.
- Displays insights as cards containing a title, a concise summary, and supporting data.

Conversational Capability

Managers who have access to **Chat with Talent Sentiment Agent** can use the **Explore** button to start a conversation with the agent. In the conversation, they can:

- Ask the agent in natural language why it generated a specific insight.
- Request deeper analysis on specific trends or categories.
- Ask how the agent ranked the importance of an insight.

Data Archival

Workday Peakon Employee Voice automatically archives conversations with the agent into a read-only state 24 hours after the last interaction. Archived conversations remain accessible for future reference, and managers can start new conversations on the same insight at any time.

Related Information
Tasks
Set Up Talent Sentiment Agent

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Talent Sentiment Agent Insight Generation and Costs

Overview

You can control the cost of insight generation through access control groups. The Talent Sentiment Agent uses Workday Flex Credits, so you can manage your spend by choosing which users and segments have access to the agent.

How Insight Generation Is Triggered

Workday Peakon Employee Voice generates agentic insights when the survey round closes, based on user permissions at that moment. Workday Peakon Employee Voice only generates insights for managers whose access control group has the **Receive automated round insights** check box selected.

If a user or segment doesn't have the required permissions when the survey round closes, Workday Peakon Employee Voice skips insight generation for those users and doesn't use Flex Credits for them.

Controlling Usage and Skipping Rounds

You can't set a separate schedule for the agent to skip rounds automatically. To control spend, manage generation manually with either of these access control setups:

Setup	Steps
Using Existing Access Control Groups	Use your existing access control group that includes the agent permissions. To generate insights: Select the **Receive automated round insights** check box in the **Sentiment Agent** section before the survey round closes. To prevent generation (Skip): Clear these permissions before the survey round closes. Workday Peakon Employee Voice generates no insights and spends no Flex Credits for this group.
Creating a Dedicated Agent Access Control Group	Create a new, specialized access control group strictly for individuals who require agent access, and include only the agent permissions. To generate insights: Make sure the group is active and the check boxes are selected before the survey round closes. To prevent generation (Skip): You can either clear the individual permissions within the group, or deactivate the access control group entirely before the survey round closes.

Related Information
Concepts
Talent Sentiment Agent
Setup Considerations: Talent Sentiment Agent

External Agents

Register and Authenticate External Agents

Prerequisites

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

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1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.

If the value is:

- *UMSA*, the feature is automatically available. Keep data contributions enabled to ensure full agent functionality. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, your organization must opt in to UMSA and enable this feature through Innovation Services.

UMSA is required for non-Production and Production tenants for Workday-Built agents. UMSA isn't required for non-Production tenants for self-built agents.

For information about how using agents impacts your Flex Credits, see: Workday Flex Credits Community page.

- Set Up Agent System of Record
- Security:
  - *Agent Management Hub* domain in the Agent System of Record functional area.
  - *Manage Agents* domain in the Agent System of Record functional area.
  - *Set Up: Tenant Setup - Security* domain in the System functional area.

Context

You must use the Agent System of Record (ASOR) API to define and register external agents. You can use any API client of your preference to invoke the API.

Refer to ASOR v1.2 API documentation on Github and ASOR JSON Swagger documentation sample for troubleshooting.

Registration endpoints:

- **REST API Endpoint:** https://us.agent.workday.com/asor/v1/agentDefinition.
- **Token Endpoint:** https://us.agent.workday.com/auth/oauth2/<Tenant_Name>/token
- **Authorize Endpoint:** https://us.agent.workday.com/auth/authorize/<Tenant_Name>?response_type=code&client_id=<client_id>&state=test3pagent1&redirect_uri=<redirect_uri>

Steps

1. Authenticate external agents.

   Do 1 of these:

   - Authenticate External Agents with an API Client
   - Authenticate External Agents with Extend

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2. Find the Workday identifiers (WIDs) of the relevant Workday SOAP and REST APIs for the agent tools definition.

   As you retrieve WIDs for your APIs, you can also cross-reference these lists:

   - REST API WIDs
   - REST APIs Not Available for Ambient Agents
   - Graph API WIDs

   a) Access the **Create Custom Report** task.
   b) Complete the report:

Option	Description
Report Type	Select *Advanced*.
Optimized for Perform	Clear this check box.
Data Source	*Public Web Services* for SOAP APIs and *All Public Service Operations* for REST APIs.

   c) Click **OK**.
   d) For SOAP APIs: On the **Edit Custom Report** page, on the **Columns** tab of the report definition, add these rows:

Business Object	Field
Web Service	*Web Service*
Web Service Operation	*Web Service Operation Name*
Web Service Operation	*Workday ID*

   e) For REST APIs: On the **Edit Custom Report** page, on the **Columns** tab of the report definition, add these rows:

Business Object	Field
Service Operation	*Service*
Service Operation	*Name*
Service Operation	*Workday ID*

   f) Save and run the report.
3. Find the agent provider.

   Agent providers refer to who has built the agent and are displayed in the **Built By** field on the agent's profile.

   a) Access the **View Agent Provider** task.

      Security: *Setup: Agents*domain in the Agent System of Record functional area.
   b) Use the Provider ID in your agent registration API call.

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4. Find the agent platform.

   Agent platforms refer to who has built the agent and are displayed in the **Built On** field on the agent's profile.

   a) ccess the **View Agent Platforms** task.

      Security: *Setup: Agents*domain in the Agent System of Record functional area.

   b) Use the Platform ID in your agent registration API call.

   c) Call the ASOR REST API.

      Create a new request to register your agent using an external API client:

Option	Description
Endpoint	*https://us.agent.workday.com/asor/v1/agentDefinition*
Operation	POST
Body	See ASOR v1.2 API documentation on Github and ASOR JSON Swagger documentation sample.
Headers	• *Authorization: Bearer <token>* • *wd-agent-tenant-alias:<your tenant name>*

Next Steps

After you successfully load your agent definition into Workday, you can verify that it is registered by viewing it in the **Agent Management Hub**:

1. Access the **Agent Management Hub**.
2. Click **Agent Registry** to display a list of your agents.
3. Click an agent to display overview information for it.

Configure your agent in Workday.

Authenticate External Agents with an API Client

Prerequisites

Security: *Security Administration* domain in the System functional area.

Context

To register external agents, you need an access token in your ASOR API invocation. Below are the different options to obtain a token to invoke the ASOR API call.

The user registering the agent must have access to the *Setup: Agents* domain in the Agent System of Record functional area to register an agent using the ASOR API.

Steps

1. Access the **Register API Client** task.
2. Complete the task:

Option	Description
Client Name	Enter a unique identifiable name for your agent. We recommend that you use a separate

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Option	Description
	client for each agent so that they are easier to manage.
Client Grant Type	Select *Authorization Code Grant*.
Access Token Type	Select *Bearer*.
Redirection URI	Enter a URL to redirect users to after authorization.
Scope (Functional Areas)	Select *Agent System of Record*.
Include Workday Owned Scope	Select this check box.

3. Copy and save the **Client ID** and **Client Secret** values.
   You can use these to get an access token to call the Definition API.
4. Paste this URL into a new window.
   You'll be redirected to google.com with an appended code you can use to call the API: *https://us.agent.workday.com/auth/authorize/<Tenant_Name>?response_type=code&client_id=<client_id>&state=test3pagent1&redirect_uri=<redirect_uri>*
5. Create a new request using an external API Client.
   This generates an access token and refresh token that you can use to call the ASOR Agent Definition API. See External Agent ASU Considerations .
   a) Access *https://<tenantHost>/ccx/oauth2/<tenantName>/token*
   b) Create the request:

Option	Description
Body	*grant_type=authorization_code&code=<authorizationCode>&*
Username	*<ClientID>*
Password	*<ClientSecret>*

Authenticate External Agents with Extend

Prerequisites

You must have access to the Workday Developer site.

Context

If you're a Workday Extend or Workday Orchestrate user, you can retrieve an access token through Workday's developer site.

Steps

1. Access developer.workday.com and sign in.
2. From the top-right user menu, select **Tenant > Sign In to Tenant**
3. Select your environment and tenant and click **Connect to Tenant**.
4. Sign in to the tenant.
   You must sign in with an account that has access to the *Setup: Agents* domain in the Agent System of Record functional area to register an agent using the ASOR API.

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Configure External Agents

Prerequisites

- Set Up Agent System of Record
- For Ambient-mode agents only: Create an X.509 Public Key
- Security: *Agent Management Hub* domain in the Agent System of Record functional area.

Context

You can configure external agents using the **Agent Management Hub**.

Steps

1. Access the **Agent Management Hub** report.
2. Select the **Agent Registry** tab and then click on the agent name to configure the agent.
3. From the agent's profile view, click **Configure Agent**.
4. In the **Status** column, enable each relevant skill .
5. For each available delegate execution mode skill, select the security groups that you want to add for that specific skill for the agent on the**Available To** prompt .

   Note: The security groups you select in the **Available To** prompt must also have permissions to the domain or business process security policies that secure the agents' tools. You can use the **View Security for Agent Skill** report to assist with your agent security configurations. This report displays the agent's Tools APIs and the respective domain or business process security policies and permissions. At agent runtime, Workday evaluates both user access to the agent and the user access to the APIs the agent is executing as tools.
6. Select the **Confirm** check box, and then click **OK**.
   a) For delegate skills, you must provide a redirect URI as the callback endpoint for your agent. Your agent development partner can provide this information.
   b) For ambient skills, you must provide an x509 public key from your agent development platform. Your agent development partner can provide this information. Select a unique key that's not in use by another agent.
7. Click **OK**.
8. When you configure the agent for the first time, we display the OAuth client details for the agent.

   Note: Copy and save the Client ID and Client Secret values. This page won't display again and you won't be able to access this information again.
9. Enter the OAuth client details and endpoint URLs back into the agent development platform code for the agent to enable access during runtime. The OAuth client and endpoint URLs details that we display include:
   - Authorize Endpoint URL
   - Token Endpoint URL
   - Endpoint URL
   - OAuth Client ID
   - OAuth Client Secret (Delegate only)
   - Username for Agent System Account (Ambient only)
10. Select **Agent Registry**, and click the agent you want to activate.
11. From the agent's profile view, click **Activate Agent**. On the **Activate Agent** window, select the **Confirm** check box, and then **OK**.

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Result

Workday automatically creates an Agent System User (ASU) and assigns an Agent Security Group (ASG) for the agent, which you can find through the **All AI Agent Accounts** report, secured to the *Workday Accounts* domain in the System functional area. You can use these as you configure the security policies and permissions for your agent.

Next Steps

Configure Security Policies for Agent Skills.

View External Agent Credentials

Prerequisites

- Set Up Agent System of Record.
- Register your external agent.
- Security: *Agent Management Hub* domain in the Agent System of Record functional area.

Context

After you register an external agent in Agent Management Hub, you can access the **Credentials** tab on its agent profile to view and edit its OAuth endpoint and credentials information.

Steps

1. Access the **Agent Management Hub** report.
2. Select the **Agent Registry** tab, and then click on the agent name to configure the agent.
3. From the agent's profile view, click **Credentials**.

   Workday displays this tab only for external agents. The tab displays OAuth endpoint information in these sections when the agent contains a skill of that execution mode:

   - **OAuth Details for Delegate Skills**: Displays when the agent contains at least 1 delegate skill. A delegate skill requires a redirect URI.
   - **OAuth Details for Ambient Skills**: Displays when the agent contains at least 1 ambient skill. An ambient skill requires an x509 public key.

   If a required credential is missing, the agent profile displays a message advising you to add it.
4. (Optional) Click **Edit** to update the credentials information for a skill.
5. (Optional) Click **Generate a New Client Secret** to update the OAuth client secret for the agent's delegate skills. Copy the secret before you leave the task. It only displays once, and the new secret replaces the previous one.

Connect External Agents to Workday Using A2A

Prerequisites

- Set Up Agent System of Record.
- Register and Configure Workday-Built Agents.
- Register and Authenticate External Agents .
    - Ensure that you include a body payload containing the target 3P agent metadata, platform ID, and the Self-Service Agent tool skill configuration (ssa-agent-as-a-tool / resource ID 6bfadd7c014610000dffae8d77c00000).

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Context

You can connect AI assistants that run outside Workday, such as Google Gemini Enterprise, to invoke the Self-Service Agent using the industry Agent2Agent (A2A) protocol. When you register a third-party client in Workday's Agent System of Record, you can enable that agent to discover and call Self-Service Agent on behalf of an authorized user.

For detailed instructions for how to connect Workday to Gemini Enterprise, see Set Up Sana From Workday for Gemini Enterprise.

Steps

1. Configure your external agent in Workday.

   Example POST Agent Definition.yaml to register your 3P Agent with Self-Service Agent as a tool

```
info:
name: POST Agent Definition
type: http
seq: 5

http:
method: POST
url: https://{{hostname}}/asor/v1/agentDefinition
headers:
- name: Content-Type
  value: application/json
- name: wd-agent-tenant-alias
  value: wdaiplatform_wcpdev2
- name: accept-encoding
  value: identity
body:
  type: json
  data: |
    {"name": "Workday Self-Service Agent on XYZ client",
    "description": "<<enter a short description of the agent>>",
    "url": "https://your-agent-url.com",
    "documentationUrl": "https://your-agent-docs-url.com",
    "provider": {
            "id": "Provider=Self-Built"},
            "iconUrl": "https://<<icon-url>>",
            "version": "1.0.1",
            "capabilities": {
            "streaming": false,
            "pushNotifications": false,
            "stateTransitionHistory": false},
            "platform": {
            "id": "Platform=<<platform-id>>"
            },
            "defaultInputModes": [
            {
            "type": "text/plain"
            "}],
            "defaultOutputModes": [
            {
            "type": "text/plain"
            },
            {"type": "application/json"
            }
            ],
            "skills": [
            {
```

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```
"id": "ssa-agent-as-a-tool",
"name": "Workday Self-Service Agent",
"description": "Connects to SSA",
"tags": [
{
"tag": "workday"
},
{
"tag": "workers"
},
{
{
"tag": "staffing"
},
{
"tag": "hr-operations"
}
],
"inputModes": [
{
"type": "text/plain"
}
],
"outputModes": [
{
"type": "text/plain"
},
{
"type": "application/json"
}
]
}
],
"workdayConfig": [
{
"skillId": "ssa-agent-as-a-tool",
"executionMode": {
"id": "Mode=Delegate"
},
"workdayResources": [
{
"tool_name": "Workday Self-Service Agent",
"description": "SSA tool",
"agent_resource": {
"id": "6bfadd7c014610000dffae8d77c00000"
}
}
]
}
]
}
auth:
type: bearer
token: <<ISU Token>>
runtime: variables:
- name: hostname
value: <<agent-gateway hostname>>

settings:
encodeUrl: true
timeout: 0
followRedirects:
true maxRedirects: 5
```

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2. Create or reuse an ISU OAuth client:
    a) Log in to Workday as **System Admin**.
    b) Access the **Create Integration System User** task (if you don't have a suitable ISU already).
    c) Access the **Register API Client for Integrations** task and:
        1. Select *Agent System of Record* from the Functional Area prompt.
        2. Check the **Include Workday Owned Scopes** check box.
        3. Save **Client ID** and **Client secret**.
    d) On the client:
        1. Click **Related Actions > Manage Refresh Tokens**.
        2. Select the ISU that you created.
        3. Generate a new refresh token.
        4. Record the new refresh token.

    You now have:

    - CLIENT_ID / CLIENT_SECRET (integration client)
    - REFRESH_TOKEN (ISU)
    - TENANT_ALIAS (typically your tenant name).
3. Generate an ISU bearer token.
    a) Send a POST using POST ISU Bearer Token.yaml in your preferred API client.

    Example:

```
                info: name: POST ISU Bearer Token
                type: http
                seq: 7
                http:
                method: POST
                url: https://<<agent-gateway-hostname>>/auth/
oauth2/{{tenant-alias}}/token
                body:
                type: text
                data:
 grant_type=refresh_token&refresh_token={{refresh-
token}}&client_id={{client-id}}&client_secret={{client-secret}}
                auth: inherit

                runtime:
                variables:
                - name: refresh-token
                value: <<refresh-token>>
                - name: tenant-alias
                value: <<tenant-alias>>
                - name: client-secret
                value: <<client-secret>>
                - name: client-id
                value: <<client-id>> scripts:
                - type: after-response
                code: |-
                let data = res.getBody();
                bru.setEnvVar("bearer-token", data.access_token);

                bru.setEnvVar("refresh-token", data.refresh_token);

                settings:
                encodeUrl:true
                timeout: 0
                followRedirects: true
```

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```
                maxRedirects: 5
```

b) Save the returned ISU Bearer Token.

c) Retrieve the Agent Card JSON using the GET Agent Card.yaml in your preferred API Client:

```
                info:
                name: GET Agent Card
                type: http seq: 2

                http:
                method: GET
                url: https://{{agent-gateway-hostname}}/v1/a2a/
{{tenant-alias}}/{{agent-wid}}/.well-known/agent-card.json
                headers:
                - name: Accept-Encoding
                value: identity
                - name: Content-Type
                value: application/json
                - name: Authorization
                value: Bearer {{bearer-token}}
                body:
                type: json
                data: ""
                auth: inherit

                runtime:
                variables:
                - name: tenant-alias
                value: <<tenant-alias>>
                - name: bearer-token
                value: <<ISU-bearer-token>>
                - name: agent-wid
                value: <<self-service-agent-wid>>

                settings:
                encodeUrl: true
                timeout: 0
                followRedirects: true
                maxRedirects: 5
```

d) Save the JSON response. This is your Agent Card.

4. Configure the external platform.

a) Import/paste the Agent Card JSON into your external AI platform.

b) Configure these OAuth settings in the external platform:

1. **Client ID** and **Client Secret**: Use the credentials saved from the **Configure and Activate the New Agent in Workday** step above.
2. **PKCE**: Enable PKCE.
3. **Auth URL**: https://<region-code>.agent.workday.com/auth/authorize/<tenant-alias>?response_type=code.
4. **Token URL**: https://<region-code>.agent.workday.com/auth/oauth2/<tenant-alias>/token.
5. **Redirect URL**: Ensure it matches the Redirect URI from the **Configure and Activate the New Agent in Workday** step above.

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5. Grant end users access.
    a) In Workday: Ensure target end users belong to the security groups assigned in the **Configure and Activate the New Agent in Workday** step above.
    b) In the external platform: Assign the Workday Agent configuration, roles, or permissions to the appropriate end-users/groups in the external system.

Result
Your external platform can now retrieve information from Workday and displays it in responses.

Connect an External Agent with Workday MCP

Prerequisites

- OAuth credentials.
- An external API Client of your choice, such as Bruno or Postman.

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

1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the **Enable Innovation Services Feature and AI Data Contributions for MSA Customers** step. For more information on Machine Learning data contributions, see Workday AI for Universal Main Subscription Agreement Customers on page 189.
- *MSA*, you must enable this feature through Innovation Services using the **Enable Innovation Services Feature and AI Data Contributions for MSA Customers** step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

You can set up your tenant to connect any registered external agent with Workday's MCP server.

Note: This functionality is for Extend Professionals only.

Steps

1. Set Up Agent System of Record.
2. Discover Available Agent-Ready MCP Tools.
3. Register External Agents.
4. Configure External Agents .
5. Configure Security Policies for Agent Skills.
6. In your API Client (Bruno or Postman), call the Authorize endpoint and log in. Example:

```
GET https://us.agent.workday.com/auth/authorize/<tenant>
Params: client_id, redirect_uri, response_type=code
```

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7. Exchange for an ASU access token. Example:

```
POST https://us.agent.workday.com/auth/oauth2/<tenant>/token
Headers: Content-Type: application/x-www-form-urlencoded
Body: grant_type=authorization_code&code=<code>
      &client_id=<id>&client_secret=<secret>

Response: { "access_token": "...", "token_type": "Bearer",
 "refresh_token": "..." }
```

   Note: Refresh your tokens before expiry as access tokens expire after 60 minutes. Refresh tokens after 24 hours.

8. Verify your connection and confirm the MCP tools are accessible. Example:

```
curl --request POST \
  --url https://us.agent.workday.com/mcp \
  --header 'Content-Type: application/json' \
  --header 'Authorization: Bearer <ASU token>' \
  --data '{
 "jsonrpc": "2.0",
 "id": 1,
 "method": "tools/list"
  }'
```

   A `200` response with a list of your registered tools confirms everything is wired correctly.

9. Connect to your agent platform.

   Any platform that supports MCP (Google Agentspace, Amazon Bedrock AgentCore, Microsoft Copilot Studio, and others) connects to the same endpoint using the same OAuth credentials. Refer to your platform's MCP integration documentation for the specific configuration steps.

   Example:

   When you add a Custom MCP in Cursor, in the mcp.json, add:

```
{
  "mcpServers": {
 "Workday MCP": {
   "url": "https://{agentGatewayRegionEndpoint}/{tenantName}/mcp",
   "headers": {
     "Authorization": "Bearer <your ASU token>"
   }
 }
  }
}
```

Configure Microsoft Agent Sync

Prerequisites

- Identify your Microsoft Global Administrators. Microsoft agent sync uses application permissions that require admin consent in Microsoft Entra. Only Global Administrators can grant admin consent for your organization. Ensure a Microsoft Global Administrator is available so that they can grant admin consent during the course of the set up.

Security: These domains in the Agent System of Record functional area:

- *Agent Compliance*
- *Agent Management Hub*
- *Manage: Agents*

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- *Reports: Agent Reporting*
- *Setup: Agents*

These domains in the System functional area:

- *Reports: AI Agent Security*
- *Security Configuration*

Context

This guide describes how to set up the one-time administrative bootstrap required to synchronize agents from Microsoft Copilot Studio (CPS) and Azure AI Foundry into the Workday Agent System of Record (ASOR).

Steps

1. Set Up Agent System of Record
2. Configure Microsoft access:
    a) Access the Microsoft Entra admin center:
    https://learn.microsoft.com/en-us/entra/fundamentals/entra-admin-center
    b) Register a new **Service Principal** (App Registration) to represent the Workday Agent Sync integration.
    c) Generate and save the Client ID and Client Secret to your clipboard for later use in Workday.
    d) Access the Power Platform Admin Center:
    https://admin.powerplatform.microsoft.com/home
    e) Navigate to **Manage > Select Environment > User + Permissions > Application Users**.
    f) Create a new Application User.
    g) Map this user to the Service Principal that you created in the previous section.
    h) For Copilor Studio integrations:
        1. Assign the roles that you want to have access to Dataverse (ex. System Administrator).
        2. PowerShell Authorization: Open PowerShell and run this command to grant the application user access to the agent's custom connectors. This step is required to connect the Service Principal and the PowerApps database.
        3.
```
                    # First, connect to your Power Platform
 accountAdd-PowerAppsAccount
                    # Define variables$connectorName
 = "%2Fproviders%2FMicrosoft.PowerApps%2Fapis
%2Fshared_staffing-20change-20job-5f37e4e62c5a1b3800-5f947f09f4586dacb3"$
 = "ad3c7726-1a23-e541-a1d1-0b4b68e34c1d"$userObjectId =
 "305cfb44-9301-4fed-8d9f-0b45a861dd6e"
                    # Assign permissionsSet-
AdminPowerAppConnectorRoleAssignment -ConnectorName
```

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```
$connectorName -EnvironmentName $environmentId -RoleName
CanView -PrincipalType User -PrincipalObjectId $userObjectId
```

4. For Azure Foundry Integration: Access **Foundry portal > Project > Project Details > Parent Resource > Users > Add User**.

i) Copy these identifiers to your clipboard for the Workday configuration:

Azure Portal:

- Tenant ID: Search for **Microsoft Entra ID > Overview > Tenant ID**.

Power Platform Admin Center (For Copilot Studio Integration):

- Environment URL and Environment ID: Click **Manage > Environment**.

Azure Foundry Platform (for Foundry integration):

- For each project, click **Foundry portal > Project > Project Details**to retrieve each endpoint.

3. Configure sync in Workday:
   a) Access the **Create Microsoft Agent Sync Configuration** task in Workday.
   b) For Foundry integration, create new Azure group resources and enter:
      - Microsoft Azure Group Name
      - Microsoft Azure Group URL: Foundry Project Endpoint
   c) For Copilot Studio project groups, enter:
      - Environment Name
      - Environment URL
      - Environment ID
   d) Create new External Client CredStore for Sync:
      - **Auth Scheme for External Client**: OAuth 2.0 Client Credential.
      - **Client ID:** Service Principle Client ID.
      - **Client Secret:** Service Principle Client Secret.
      - **Token Endpoint:** https://login.microsoftonline.com/<TenantID>/oauth2/v2.0/token
   e) Click **OK** and start the sync.
4. Verify agent sync:
   a) Access Agent Management Hub.
   b) Configure External Agents .
   c) In Microsoft:
      - For Copilot Studio: Edit the security settings of your Custom Connector and enter the Workday ASU credentials.
      - Use the Copilot agent playground to invoke the agent and confirm it can successfully call Workday.

Connect Custom Agents to External Agents Using A2A

Prerequisites

- Set Up Agent System of Record.
- Build and Deploy Custom Agents.
- Register and Authenticate External Agents .

Ensure that you include a body payload containing the target 3P agent metadata, platform ID, and the Self-Service Agent tool skill configuration (ssa-agent-as-a-tool / resource ID 6bfadd7c014610000dffae8d77c00000).

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Context

You can connect Custom Agents to external agents, such as Google Gemini Enterprise, using the industry Agent2Agent (A2A) protocol. When you register a third-party client in Workday's Agent System of Record (ASOR), you can enable that agent to discover and call the Custom Agent on behalf of an authorized user.

For detailed instructions for how to connect Workday to Gemini Enterprise, see Set Up Sana From Workday for Gemini Enterprise.

Note: This functionality is for Extend Professionals only.

Steps

1. Create a Custom Agent (3P) Agent Definition in ASOR that references your Custom Agent as tools. Workday recommends creating a new agent definition per client system you integrate with, not per Custom Agent.
    a) Access the **Agent Management Hub**.
    b) In Agent Registry, select **Integration IDs > View IDs** from the related action of the Custom Agent.
    c) Copy the Workday ID.
    d) Access the Workday Development Site.
    e) Connect to the relevant tenant and select **Copy Token**.
    f) Call the ASOR REST API and create a new request to register your agent using an external API Client, Example: Bruno.

    As you create the request, consider:

    1. Endpoint: https://us.agent.workday.com/asor/v1/agentDefinition
    2. Operation: POST
    3. Body: Refer to ASOR v1.2 API documentation on Github and ASOR JSON Swagger documentation sample.
    4. Headers:
        a. Authorization: Bearer <token>
        b. wd-agent-tenant-alias: <your tenant name>

    Example:

```
curl --request post \
--url
https://us.agent.workday.com/asor/v1/agentDefinition
\
--header 'Authorization: {{bearer token}}' \
--header 'Content-Type: application/json'
\
--header 'wd-agent-tenant-alias: {{tenant-alias}}'
--data'
"name": "Custom Agent via A2A",
"description": "3P Agent Definition to enable
connectivity between Custom Agents and a 3P System",
"provider": {
},
"id": "Provider=SELF-BUILT"
"url": "https://us.agent.workday.com",
"platform": {
},
"id": "Platform=OTHER"
"skills": [
{
"description": "This skill enables connectivity
to Custom Agents.",
```

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```
"id": "custom-agent-as-a-tool",
"inputModes": [
{
"type": "text/plain"
}
],
"name": "Custom Agent",
"outputModes": [
{
"type": "text/plain"
},
"type": "application/json"
}
]
}
 ,
"workdayConfig": [
{
"workdayResources":[
{
}
],
"description": "Custom Agent as a tool",
"tool name": "Custom Agent as Tool",
"agent resource": {
"id": "{{Custom Agent wid}}"
}
}
],
"executionMode": {
"id": "Mode=Delegate"
},
"skillId": "custom-agent-as-a-tool"
}'
"capabilities": {
},
"stateTransitionHistory": false,
"streaming": false,
"pushNotifications": false
"supportsAuthenticatedExtendedCard": false,
"version": "v1"
```

2. Configure and activate 3P agent in App Registry:
    a) Access the **Agent Management Hub**.
    b) In **Agent Registry**, select the 3P agent just created.
    c) From the agent's profile view, click **Configure Agent**.
    d) In the **Status** column, make each relevant skill available by enabling the toggle slider.
    e) For each available delegate execution mode skill, populate the **Available To** prompt and determine the security groups that you want to add for that specific skill for the agent.

    Note: The security groups you select in the **Available To** prompt must also have permissions to the domain or business process security policies that secure the agents' tools. You can use the **View Security for Agent Skill** report to assist with your agent security configurations. This report shows you detailed information about the agent's Tools APIs and the respective domain or business process security policies and permissions. At agent runtime, Workday

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evaluates both user access to the agent and the user access to the APIs the agent is executing as tools.

f) Click the **Confirm** check box, and then click **OK**.
g) For delegate skills, add the relevant redirect url for the client system you are connecting to.
h) Click **OK**.
i) When you configure the agent for the first time, we display the OAuth client details for the agent.
j) Copy and save the Client ID and Client Secret values. This page won't display again and you won't be able to access this information again.

Select **Agent Registry**, and click the agent you want to activate.

k) From the agent's profile view, click **Activate Agent**. On the **Activate Agent** window, select the **Confirm** check box, and then **OK** to complete the activation.

3. Create or reuse an ISU OAuth client:
   a) Log in to Workday as **System Admin**.
   b) Access the **Create Integration System User** task (if you don't have a suitable ISU already).
   c) Access the **Register API Client for Integrations** task and:
      1. Select *Agent System of Record* from the **Functional Area** prompt.
      2. Check the **Include Workday Owned Scopes** check box.
      3. Save Client ID and Client secret.
   d) On the client:
      1. Click **Related Actions > Manage Refresh Tokens**.
      2. Select the ISU that you created.
      3. Generate a new refresh token.
      4. Record the new refresh token.
   e) You now have:
      1. CLIENT_ID / CLIENT_SECRET (integration client)
      2. REFRESH_TOKEN (ISU)
4. Generate an ISU bearer token.
   a) Send a POST using POST ISU Bearer Token.yaml in your preferred API client.

   Example:

```
curl --request POST
--url
https://us.agent.workday.com/auth/oauth2/TENANT ALIAS/toke
n
--header 'Content-Type:
application/x-www-form-urlencoded'
--data 'grant_type=refresh_token'
--data 'refresh token={{refresh token}}'
--data 'client id={{client id}}'
--data 'client_secret={{client secret}}'
```

   b) Save the returned ISU Bearer Token.
   c) Retrieve the Agent Card JSON using the GET Agent Card.yaml in your preferred API Client:

```
curl --request GET
--url
https://us.agent.workday.com/v1/a2a/TENANT ALIAS/AGENT ID/
.well-known/agent-card.ison
--header 'Authorization: Bearer {{bearer token}}'
--header 'Accept-Encoding: identity'
```

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```
--header 'Content-Type: application/json'
```

d) Save the JSON response. This is your Agent Card.

5. Configure the external platform.
   a) Import/paste the Agent Card JSON into your external AI platform.
   b) Configure these OAuth settings in the external platform, referencing the details provided in the Connectivity Tab of the Agent you configured:
      1. **Client ID** and **Client Secret**.
      2. **PKCE**: Enable PKCE.
      3. **Auth URL**: https://<region-code>.agent.workday.com/auth/authorize/<tenant-alias>?response_type=code.
      4. **Token URL**: https://<region-code>.agent.workday.com/auth/oauth2/<tenant-alias>/token.
      5. **Redirect URL**: Ensure it matches the Redirect URI from the **Configure activate 3P agent in App Registry** step above.

Result

Your external platform can now use the 3P agent.

External Agent ASU Considerations

Delegate ASUs

The ASU client credentials that are provided after agent configuration should be used for OAuth 2.0 Authorization Code Grant Flow to enable your agent to get access during agent runtime.

When you test the authorization code grant flow of an external agent, use the client details and endpoint URLs provided during agent configuration as inputs for these steps:

1. Retrieve the authorization code by pasting this URL into a new window: *https://<providedAuthorizeEndpoint>?response_type=code&client_id=<clientID>&state=<agentName>&redirect_uri=<redirectionURI>*.

   The URL redirects you to a login page where you must manually provide your user credentials that the agent will be acting on behalf of.

   After you log in, Workday redirects you to an **Allow/Deny** page where you grant the agent access to your Workday account. Select *Allow* to be redirected to your provided Redirection URI with an appended code, which you can use to call the next API.
2. Retrieve the ASU token by creating a new request using an external API client using the authorization code provided in the previous API call.

   Example: Bruno:

   - *POST https://<providedTokenURL>*
   - *Body:grant_type=authorization_code&code=<authorizationCode>&client_id=<clientID>&client_secret=<ClientSe*

     This generates an access token and a refresh token that you can use to test calls your agent makes to Workday services.

In the body of the response back from the token endpoint, the *expires_in* string value is expected to be returned. In different test environments, this parameter type can differ between Integer and String, so Workday recommends that the external client is able to handle both string and int types.

When you need to update an agent definition, you can supply the same agent name, version, and provider to the POST AgentDefinition API, and it will update. If there isn't a match, Workday creates a new agent registration.

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When your agent sends the request to the token endpoint using AuthCode and client credentials, both the access token and refresh tokens are created and sent back.

The access token expiry time is 14400 sec (4 hours). The refresh token expiry time is 24 hours.

When an access token expires, the refresh token creates a new one.

Typical OAuth clients should only need:

- **Client Secret** and **Client ID**: Obtained during the agent configuration process.
- **Authorize Endpoint**: *https://us.agent.workday.com/auth/authorize/ <Tenant Alias>*
- **Token Endpoint**: *https://us.agent.workday.com/auth/oauth2/<Tenant_Alias>/token*
- **Redirect URL**: Provided by the agent developer during the agent configuration process.

Ambient ASUs

The ASU Client ID and username that are provided after agent configuration should be used to perform JWT assertion and token generation. Note that the:

- Issuer must be the Client ID.
- Subject must be the ASU username.

The x509 corresponding keypair that's required during ambient skill registration is used during agent runtime to perform JWT assertion.

Update your agent's code so that during agent runtime, when a request is submitted to the agent, the agent checks if it has a valid access token cached. If it doesn't, or if the token is expired, we:

- Create a new JWT assertion.
- Fetch a JWT Bearer token.
- Cache token for Workday API requests.

ASOR Agent Resource Search API

You can use the asor/agentResourceSearch endpoint (secured to the *Setup: Agents* domain in the Agent System of Record functional area) to find the WIDs of public Workday APIs to use with your external agents.

Query Parameters

The endpoint supports these query parameters:

- searchString:
  - You can provide a string for this query parameter that searches through the list of public operations that contain that string. Example: if you enter "Location", then we return all operations related to "Location", such as Put Inventory Storage Location.
- operationType:
  - This query parameter is a string that searches by operation type. It supports these values: Create, Patch, View. For SOAP operations, it maps Patch to Put and View to Get.
- toolType:
  - This query parameter is a string that searches by tool type. It supports these values: SOAP, REST, MCP.

Sample Response

```
`{ "type": "SOAP","name": "Put Inventory Storage Location",
         "description": "This service operation creates the Inventory
 Storage Location.",
         "wid": "2c6143cd33da10000d22312205450221",
```

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```
          "mcpEnabled": false,
          "httpEnabled": true
          { "type": "SOAP",
          "name": "Put Campus Location Decision Policy",
          "wid": "c1941a9b6f071000142d9832a9865172",
          "mcpEnabled": false,
          "httpEnabled": true },
          } `
```

Sample ASOR API Agent Definition

The first section of this API defines basic information about your agent:

```
{
  "name": "Change Business Title Agent",
  "description": "A Workday agent for changing a business title with Agent
 Gateway",
  "provider": {
    "id": "Provider=SELF-BUILT"
  },
  "url": "https://changetitleagent.com",
  "platform": {
      "id" : "Platform=GOOGLE_AGENTSPACE"
   },
  "skills": [
    {
      "description": "This skill gets worker information and changes a
 business title.",
      "id": "changeTitle_1",
      "inputModes": [
        {
          "type": "application/json"
        }
      ],
      "name": "Change Title",
      "outputModes": [
        {
          "type": "application/json"
        }
      ]
    }
  ],
  "workdayConfig": [
    {
      "workdayResources": [
        {
          "description": "Change Business Title",
          "tool_name": "changeBusinessTitle",
          "agent_resource": {
            "id": "c2ffb30053964fbfa7a46dcfa577adb1"
          }
        },
        {
          "description": "Get Workers",
          "tool_name": "getWorkers",
          "agent_resource": {
            "id": "94a39e71541b468fa895955508287acd"
          }
        },
        {
          "description": "Internal Auth Check",
          "tool_name": "internalAuthCheck",
```

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```
          "agent_resource": {
            "id": "6bbfa713d3851000081920672a0f0009"
          }
        }
      ],
      "executionMode": {
        "id": "Mode=Delegate"
      },
      "skillId": "changeTitle_1"
    }
  ],
  "capabilities": {
    "stateTransitionHistory": false,
    "streaming": false,
    "pushNotifications": false
  },
  "supportsAuthenticatedExtendedCard": false,
  "version": "v1"
}
```

The second section of this API is optional. It includes Workday-specific information including which APIs will be invoked as part of this agent:

```
{
     "workdayResources": [
       {
         "description": "Change Business Title",
         "tool_name": "changeBusinessTitle",
         "agent_resource": {
           "id": "c2ffb30053964fbfa7a46dcfa577adb1"
         }
       },
       {
         "description": "Get Workers",
         "tool_name": "getWorkers",
         "agent_resource": {
           "id": "94a39e71541b468fa895955508287acd"
         }
       },
       {
         "description": "Internal Auth Check",
         "tool_name": "internalAuthCheck",
         "agent_resource": {
           "id": "6bbfa713d3851000081920672a0f0009"
         }
       }
     ],
     "executionMode": {
       "id": "Mode=Delegate"
     },
     "skillId": "changeTitle_1"
   }
```

Each skill can have multiple tools. Each tool points to an individual Workday resources in which you can specify using the Workday ID (WID) of the resource.

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Sample Response

After you successfully register an agent through the API, you should receive a JSON response:


```
{
  "version": "v1",
  "provider": {
    "descriptor": "Self-Built",
    "id": "9030a823ae1a10002d624e2d637e0000"
  },
  "skills": [
    {
      "inputModes": [
        {
          "type": "application/json"
        }
      ],
      "id": "changeTitle_1",
      "description": "This skill gets worker information and changes a
 business title.",
      "name": "Change Title",
      "outputModes": [
        {
          "type": "application/json"
        }
      ]
    }
  ],
  "url": "https://changetitleagent.com",
  "description": "A Workday agent for changing a business title with Agent
 Gateway",
  "capabilities": {
    "pushNotifications": false,
    "stateTransitionHistory": false,
    "streaming": false
  },
  "workdayConfig": [
    {
      "executionMode": {
        "descriptor": "Delegate",
        "id": "d785eba56e9c100035d336a043ff0000"
      },
      "skillId": "changeTitle_1",
      "workdayResources": [
        {
          "description": "Internal Auth Check",
          "tool_name": "internalAuthCheck",
          "agent_resource": {
            "id": "6bbfa713d3851000081920672a0f0009",
            "descriptor": "trident/userAuth/checkAuth (GET) (v1 -  )"
          }
        },
        {
          "agent_resource": {
            "id": "c2ffb30053964fbfa7a46dcfa577adb1",
            "descriptor": "api/workers/businessTitleChanges/create (POST)
 (v1 -  )"
          },
          "tool_name": "changeBusinessTitle",
          "description": "Change Business Title"
        },
        {
          "tool_name": "getWorkers",
          "agent_resource": {
```


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```
            "id": "94a39e71541b468fa895955508287acd",
            "descriptor": "api/workers/view (GET) (v1 -  )"
          },
          "description": "Get Workers"
        }
      ]
    }
  ],
  "platform": {
    "id": "b49b32cfdbef10002184b61535490000",
    "descriptor": "Google Agentspace",
    "reference_id": "GOOGLE_AGENTSPACE"
  },
  "name": "Change Business Title Agent",
  "supportsAuthenticatedExtendedCard": false
}
```


The response contains an ID at the top, which is your reference Workday ID if you need to GET the agent definition using the agentDefinition API.

Agent Security

Agent Security

The agent security framework governs the identity, authentication, and authorization of AI agents within your tenant. Agent security controls how agents interact with data and perform tasks. Workday recommends abiding by the principle of least privilege for all interactions, granting agents the minimum necessary access to domains and business processes required for their specific skills.

While you manage the lifecycle and definition of your agents in the Agent System of Record (ASOR), agent security dictates their runtime behavior.

The agent security framework supports these agent execution modes:

- Delegate mode: The agent acts on behalf of a user. Example: A user asks an agent to request the day off for a specific date. The agent executes the request on behalf of the user. Workday evaluates security based on the intersection of the user's permissions and the agent's enabled skills, as the user making the requests must have security access to the underlying agent tools and tasks.
- Ambient mode: The agent acts based on an event trigger or schedule to perform background tasks. Example: An agent automatically aggregates data pools or evaluates datasets based on a schedule. The agent acts as itself, using its own security permissions without user intervention.

You can’t delegate Workday agent interactions or use a proxy.

The agent security framework also provides clear audit trails that distinguish when an agent acts autonomously and when it acts on behalf of a user.

While you manage the lifecycle and definition of your agents in the Agent System of Record (ASOR), Agent Security dictates their runtime behavior.

Agent Identity: Agent System User (ASU)

Each agent has a unique identity, or Agent System User account (ASU). ASUs provide:

- Control over what the agent can access.
- Transparency for auditing.

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An agent can have up to 2 ASUs, 1 each for delegate execution and ambient execution. When an agent needs to operate in both delegate and ambient modes, you must configure credentials for each. Each ASU has a specific OAuth 2.0 client.

ASUs don't support proxy accounts.

ASU Creation and Registration

The ASU creation process occurs in tandem with the agent's configuration and skill enablement in ASOR. When an administrator enables skills for an agent, ASOR automatically creates a dedicated delegated ASU or ambient ASU for that agent in a disabled state. When you activate the agent, Workday automatically enables the associated ASUs.

An OAuth client is generated and attached to an ASU. A private key pair is created, and the public key is registered with the Workday authorization server. The ASU is then granted the ability to authenticate and perform tasks defined in its skills.

ASOR securely stores the client credentials, including the private key, in the credential store. A unique reference ID is then stored in ASOR as a pointer to these key-pair credentials, which are used to generate ASU tokens that are exchanged along with the user token for a delegated ASU, rather than for OAuth 2.0 client credentials.

Agent Interaction Policy

The agent interaction policy is a security configuration within ASOR that defines which users are authorized to converse with or invoke specific delegate agent skills. You must opt-in security groups to allow them to use these skills.

When a user attempts to interact with an agent, the Workday agent security framework performs this security evaluation:

- First, Workday checks whether the user belongs to a security group included in the agent’s interaction policy. You select these security groups on the **Available To** prompt. If the user isn’t a member of any of these groups, Workday denies the agent interaction, even if the user has access to the necessary domain or business process security policies to perform the tasks defined in the skill’s **Tools** section.
- If the user passes the interaction check, Workday then verifies their standard permissions, including domain access and business process security policies, to ensure they're authorized to see the data or perform the action requested. Workday checks the domains for the tools and at the field level when using the agent’s skill.

The agent interaction policy applies only for agents and skills that operate in the delegate mode. Because ambient agents act as themselves in the background based on triggers or schedules, they don’t interact directly with a user and therefore don’t require a policy defining which user can interact with them.

You can define the agent interaction policy in the **Agent Management Hub** or during agent registration by selecting security groups on the **Available To** prompt for a specific skill.

Example: For a Recruiting agent with a Job Requisition Creation skill, you can select the Recruiters security group on the **Available To** prompt. Only users in the Recruiters security group can request the agent to create a requisition. A user in the Employee As Self security group can’t use this skill, even if they have domain access to create requisitions.

Comparison of Security Modes

Consideration	Delegate Mode	Ambient Mode
Primary Use Case	Interactive tasks. Example: Request time off for yourself.	Background tasks. Example: Data aggregation.

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Consideration	Delegate Mode	Ambient Mode
Identity Used	Combination of user and agent ASU.	Agent ASU only.
Authentication	The agent uses the OAuth 2.0 in the On-Behalf-Of flow. Workday-built agents: The access token is valid for up to 60 minutes when you use the Authorization Code grant. External agents: The access token is valid for 4 hours. You can't customize access token expiry for third-party agents currently.	The agent authenticates as an ambient ASU, with no user involvement.
Authorization Logic	Workday evaluates security based on the intersection of the user's permissions and the agent's allowed skills.	Workday evaluates security solely against the agent's permissions.
Configuration	Agent Interaction Policy: Defines who can interact with the specific agent skills.	Domain Security Policy: Defines what the agent can access.
Security Groups	The user must be in the allowed security groups for the skill to invoke it.	When you activate an ambient skill, a unique Ambient Agent Security Group is generated and must be assigned to the relevant domain or business process security policies.
Audit Log	Records the transaction as performed by the agent as *By User* and the user as *On Behalf Of User*.	The audit log shows the agent ASU as the *By User*.

Security

Security groups managing agents require View and Modify access to Report/Task permissions to view and execute agent tasks, and Put access to Integration permissions to transfer agent configuration data.

Domain	Considerations
Agent Management Hub	Provides access to the centralized hub for viewing and managing all agents.
Manage: Agents	Provides access to setup tasks and activities for ASOR.
Reports: AI Agent Security	Provides access to the **View AI Agent User Audit Trail** report.
Setup: Agents	Provides access to tasks for configuration, activation, and deactivation of agents.

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Reporting

We provide these reports for agent security:

Report	Description
View Security for Agent Skill	Displays the domain and business process security policy configuration for agent skills. You can access this report from the related actions menu of an agent skill.
View AI Agent User Audit Trail	Displays user activity, distinguishing between By User and On Behalf Of User.

View Security for Agent Skills and Tools

Prerequisites

Security: *Manage: Agents* domain in the Agent System of Record functional area.

Context

You can use the **View Security for Agent Skill** report to find the recommended, required, and optional security permissions for the skills and tools in your agent. If there are no recommended policies, the report displays all available policies. You can also test security access permissions to tools and skills for users through the **Test My Setup** button in the report. As you test your setup, you can drill down to display all security policies and groups for a user that they can currently use to access the tool

Steps

1. Access the **View Security for Agent Skill** report.
   As you access the report, consider:

Option	Description
Registered Agent	Enter the name of the agent to view its security.
Agent Skills	Enter the name of a skill in the agent to view its security.

2. In the results of the **View Security for Agent Skill** report, consider:

Option	Description
Tool Name	The name of the tool.
Tool Description	The description of the tool.
Functional Status	The functional status of the tool for the security group that displays in the **Available To** field. Supports these values: • **Full Match:** The security group that displays in the **Available To** field has all the required security policies needed to access the tool.. • **Review Required:** The security group that displays in the **Available To** field only has some of the required security

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Option	Description
	policies needed to access the tool. We recommend that you review the security permissions for the group. • **Config Required:** One or more required security policies have no security groups. Configure them first. • **Not Evaluated:** There's no group in the **Available To** field to evaluate for security access.
Type	The type of security policy for the tool.
Required Permissions	The permissions needed on the security policy to access the tool. Includes either View or Modify permissions.
Recommended Security Policies	The security policies that we recommend that you use to access the tool.
Assigned Security Group	The security groups assigned to the recommended security policies for accessing the tool.
Additional Security (Optional)	The optional security policies that enhance the end-user experience, such as providing field-level access, but aren't required for the tool to function.
Test My Setup	You can use this button to test the security setup of a security group to determine if they can access the tool.

3. (Optional) Click **Test My Setup** to test and debug user access to a tool, as well as display alternate security policy pathways.

   Security: The *Security Administration* domain in the System functional area.

Result

The security permissions for the skills and tools in your agent display in the report.

Next Steps

Test and configure the security setup for your agents using the report. Prioritize resolving **Config Required** and **Review Required** statuses. Use **Test My Setup** to confirm that a user can access the tool. If users need additional access, review the **Additional Security (Optional)** and related domain policies.

View Agent Passport Security for Agents

Prerequisites

- Set Up Agent System of Record .
- Security: *Agent Management Hub* domain in the Agent System of Record functional area.

Context

You can use the **Passport** tab on agent profiles to view the security stamps for your agents. Agent stamps indicate compliance with industry security standards.

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Agent passport provides customers with security and compliance details regarding Workday-provided and third-party agents within Workday's Agent System of Record. This information, delivered by Workday alongside industry-leading experts, helps customers assess potential risks associated with agent interactions within Workday.

Steps

1. Access the **Agent Management Hub** report.
2. Select the **Agent Registry** tab, and then click on the agent name to configure the agent.
3. From the agent's profile view, click **Passport**.

   On the **Stamps** table, we display the security details for your agent stamps including: stamp name, description, associated assessors, and the date the stamp was granted.
4. (Optional) Click a stamp name to view additional security compliance information for that agent passport stamp.

Configure Security Policies for Agent Skills

Prerequisites

- Unique Ambient Agent Security Group is generated for ambient agents.
- Security: *Security Configuration* domain in the System functional area.

Context

Workday evaluates security for:

- Delegate agents, by using the security access of the invoking user.
- Ambient agents, based on the agent's permissions. When you activate a skill, Agent System of Record (ASOR) generates a unique Ambient Agent Security Group (ASG). You must assign this ASG to the relevant domain or business process security policies to grant access to secured items, such as tools and APIs.

Steps

1. Access the **View Security for Agent Skill** report.
2. From the related actions menu of each **Security Policy**, select **Domain Security Policy > Edit Permissions**.
   a) Complete the task:

Option	Description
Delegate Agent	From the **Security Groups** prompt, select the security groups that include the invoking users who require access.
Ambient Agent	From the **Security Groups** prompt, select the Ambient Agent Security Group.

   b) Select the **View** or **Modify** check boxes to grant the security group access to securable items.
   c) If a tool in the **View Security for Agent Skill** report requires Get/Put access, select the **Get** or **Put** check boxes to grant security groups access to integrations.
3. Activate Pending Security Policy Changes

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FAQ: Agent Security

Where are OAuth tokens and token validity stored?	Workday stores OAuth tokens and token validity settings in the Workday Object Management System (OMS).
How does Workday mitigate risk if OAuth or session tokens are compromised?	Workday provides preventive controls to help protect against replay attacks from OAuth clients. When session or access tokens are compromised, an attacker could replay requests within the token's lifetime. Workday can't detect compromised credentials on your behalf. When you suspect compromise, disable the affected OAuth 2.0 client to protect against further use of those credentials. You enforce this control on the customer side.
Can I customize access token expiry for agents?	For Workday-built agents, you can customize how long access tokens remain valid when you configure OAuth Client and OAuth Client for Integrations settings. For external agents, access token expiry customization isn't available. Workday plans to add this capability in a future release. For more on how token-related activity is recorded, see Concept: User Activity Logging.
Are access token and refresh token expiry configurable?	Yes. For integration clients, access token and refresh token settings, including expiry, are fully configurable. For external agents, access token expiry customization is planned for a future release.
How are Agent System Users (ASUs) managed and stored? Do they use the same Workday accounts as Integration System Users (ISUs)?	Workday stores and manages ASUs in the Workday Object Management System (OMS). Similar to an Integration System User (ISU), each agent uses ASU accounts, and therefore the agent has a unique identity, or user account, so you have unambiguous control over what the agent can access and clear transparency for auditing. • Unique identity: Each agent has a unique ASU account. • Mode-specific accounts: An agent can have up to 2 ASUs; 1 for delegate execution and 1 for ambient execution. Each ASU has a dedicated OAuth 2.0 client. • Management: When you configure skills in the Agent System of Record (ASOR), Workday automatically generates and manages the required ASUs. For example, activating an ambient skill triggers creation of the necessary ambient ASU.

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What are the key differences between ASUs and ISUs?	While ASUs and ISUs both provide dedicated system user accounts in Workday, ASUs are tied to the tools and skills that you configure, manage, and audit in ASOR and ISUs support integration use cases. For more information, see Concept: Agent Security.
How are agent skills populated, controlled, and configured by Workday and/or the customer?	You configure agent skills in ASOR under your organization's security administrator. Workday and your organization enable skills based on your agent design and security requirements. Map high-risk or sensitive transactions in your tenant to the skills that Workday and your organization have enabled. You can monitor and audit AI agent transactions and activity using the **View AI Agent Users Audit Trail** report.

Sana for Workday

Concept: Sana Workspace

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

1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.

If the value is:

- *UMSA*, the feature is automatically available. Keep data contributions enabled to ensure full agent functionality. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, your organization must opt in to UMSA and enable this feature through Innovation Services.

UMSA is required for non-Production and Production tenants for Workday-Built agents. UMSA isn't required for non-Production tenants for self-built agents.

For information about how using agents impacts your Flex Credits, see: Workday Flex Credits Community page.

To use this functionality, you must:

- Sign the Universal Main Subscription Agreement (UMSA).

  Note: When you sign the agreement, Workday provides your organization with complimentary Flex Credits that you can use towards Sana Core for Workday. Once you reach the allotted complimentary Flex Credit consumption, you must sign the Workday Flex Credits and Platform Entitlement Policy to continue to use Sana Core for Workday.

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- Purchase the Core Human Capital Management or Core Financials SKU. This only applies to Sana Core.
- Sign the Workday Flex Credits and Platform Entitlement Policy. This only applies to Sana Enterprise.
- Purchase the Sana Enterprise SKU. This only applies to Sana Enterprise.

Sana Core provides conversational, agentic AI for HCM and Financials, both within Workday and the Sana Workspace, enabling workers to ask questions and take action within Workday.

Sana Enterprise expands on Sana Core to include third-party connectors and orchestrations, enabling workers to complete work both within Workday and across other third-party applications.

To help you get started, see the:

- Frequently Asked Questions for Sana Core and Enterprise on Workday Community.
- Sana Help Center.

Capabilities	Sana Core	Sana Enterprise
Access to the Sana Workspace, including file upload for research and analysis and LLM chat, available on the web only.	Yes	Yes
Read and write actions in Workday through the Self-Service Agent.	Yes	Yes
Agentic chat with user history and citations.	Yes	Yes
Single sign-on shared with your Workday tenant.	Yes	Yes
Role and permission mirroring so access and actions comply with the Workday security configuration.	Yes	Yes
Administrators can enable and manage supported third-party connectors used by Sana Enterprise. Available connectors can read and write across external applications. Administrators have granular connector controls to limit user access.	No	Yes
Support custom Model Context Protocol (MCP) connectors. Administrators can integrate internal or long-tail systems securely using OAuth.	No	Yes
Users with appropriate permissions can request and perform actions in connected systems directly from Sana Enterprise chat.	No	Yes

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Capabilities	Sana Core	Sana Enterprise
Prompts users to review and confirm actions that require human-in-the-loop approval before proceeding. All cross-system actions are logged and available for audit.	Yes	Yes
Provides data analysis and visualization through secure backend code execution, supporting structured data such as spreadsheets and generating charts. Sana writes and runs code behind the scenes.	Yes	Yes
Deliver chat responses containing rich, interactive elements instead of only plain text.	Yes	Yes
Use agent builder to create custom agents. Describe what you want using natural language. Users can trigger agents manually, on a schedule, or through third-party events.	No	Yes
Administrators can build and publish agents to the whole organization, creating a library of verified agents anyone in the organization can adopt. Administrators can maintain published agents with updates automatically pushed to subscribers.	No	Yes
On the Sana Workspace, users can browse, evaluate, and subscribe to administrator-created agents. Users can only subscribe to agents that run on an automated schedule.	No	Yes
Validates agent requirements to ensure agent reliability and users have the necessary prerequisites before they can subscribe to an agent and continue to use it.	No	Yes
A central location to view completed agent outputs and manage pending approvals in the Sana Inbox.	Yes	Yes

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Capabilities	Sana Core	Sana Enterprise
Individual agent pages that enable users to navigate back to each created agent to view the history and configuration.	No	Yes
A Meeting Agent can join Google Meet, Microsoft Teams, and Zoom meetings automatically as a notetaker. The agent records, creates searchable summaries, and extracts decisions and action items. Indexes meeting transcripts. Transcripts become searchable and become available to agents to consume.	No	Yes
A navigational search-as-you-type in the main chat drop down that surfaces links to Workday people, reports, and tasks. Users can jump straight to the right place.	Yes	Yes
An in-chat conversational search to refine queries naturally, providing users with a flexible, conversational way to find things. Users can ask Sana for a specific person, task, or report and get deep-linked, clickable results right in the conversation.	Yes	Yes

You can access the Sana Workspace from your Workday tenant when you click:

- The **Sana** card on the **Workday Home** page.
- The **Explore Sana** button on the Workday search results page.
- **Sana** in the global navigation bar.

Note: To enable the **Sana** card on the **Home** page and the **Explore Sana** button on search, you must enable the **Sana** card in the **Work Tools** section on the **Home Cards Workspace**.

Related Information
Examples
Sana Help Center
Sana Features Page
Getting Started for Admins
Connector Guides
Workday Community: Getting Started with Sana
2025R2 Feature Release Note: Sana Core for Workday
2025R2 Feature Release Note: Sana Enterprise for Workday

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Set Up Sana for Workday

Prerequisites

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

1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.

If the value is:

- *UMSA*, the feature is automatically available. Keep data contributions enabled to ensure full agent functionality. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, your organization must opt in to UMSA and enable this feature through Innovation Services.

UMSA is required for non-Production and Production tenants for Workday-Built agents. UMSA isn't required for non-Production tenants for self-built agents.

For information about how using agents impacts your Flex Credits, see: Workday Flex Credits Community page.

To use this functionality, you must:

- Sign the Universal Main Subscription Agreement (UMSA).

  Note: When you sign the agreement, Workday provides your organization with complimentary Flex Credits that you can use towards Sana Core for Workday. Once you reach the allotted complimentary Flex Credit consumption, you must sign the Workday Flex Credits and Platform Entitlement Policy to continue to use Sana Core for Workday.
- Purchase the Core Human Capital Management or Core Financials SKU. This only applies to Sana Core.
- Sign the Workday Flex Credits and Platform Entitlement Policy. This only applies to Sana Enterprise.
- Purchase the Sana Enterprise SKU. This only applies to Sana Enterprise.

Security: These domains in the System functional area:

- *Sana Agent User Provisioning*
- *Sana Enterprise*
- *Security Activation*
- *Security Configuration*

Context

You can set up Sana for Workday to deliver an AI-native experience, enabling you to interact with Workday conversationally. To ensure security setup for Sana and the related AI agents is complete, Workday sends notifications to administrators. We notify:

- Workday security administrators to complete the **Set Up AI Admin Security Permissions** task.
- Agent System of Record administrators to configure and activate the Self-Service Agent.
- Sana administrators to optionally configure or modify default settings in the Sana Workspace.
- User provisioning administrators to provision employees to Sana.

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Steps

1. Set Up AI Administrator Security Permissions.
2. Set Up Agent System of Record.
3. Edit Domain Security Policies.

   Configure the *Sana Enterprise* domain in the System functional area.

   Note: This step is required if your organization purchased Sana Enterprise. This domain configuration determines who can use cross-system connections and Sana Enterprise features.
4. (Optional) Access the **Set Up Security Groups for User Provisioning** task.

   Add rows to the grid and select the security groups you want to enable for Sana provisioning on the **Security Groups** prompt. You can select only these groups when you provision users to Sana Workspace.

   Security: *Set Up: User Provisioning* domain in the System and User Provisioning functional areas.
5. Provision users to Sana Workspace.

   Wokday notifies the appropriate administrators to provision users to the Sana Workspace.

   a) In Workday, open the **Action Required: Provision Users to Sana Workspace** notification from the **Notifications** menu.
   b) Click the link in the notification to open the User Provisioning Workspace.
   c) On the **Products** page, click **Configure** in the **Sana** tile.
   d) In the **Provision Users** section, click **Edit Provisioning Group**.
   e) In the **Using Workday Security Groups** prompt, select one of these:
      - *All* to provision all users for Sana.
      - Individual security groups to provision.
   f) Click **Update Provisioning Group**.
   g) Click **Preview and Enable Sync**.
   h) Review the users who you want to provision, select the confirmation check box, and click **Enable Sync**.

   After you enable syncing, Workday automatically provisions users in the selected security groups for access to the Sana Workspace.
6. Enable the **Sana** card on the Workday Home page.

   a) Access the **Home Page Configuration**.
   b) In the **Web Widgets** section, click **Configure**.
   c) In the **Sana**row, enable the setting.
   d) Click **OK**.
   e) (Optional) To enable the **Sana** card on the mobile app home page, repeat the above steps in the **Mobile App Widgets** section.

   Note: Workday displays the **Ask Sana** button at the top of the Workday Home page, replacing the existing chat icon. You can opt-out of this button by accessing the **Maintain Feature Opt-Ins** report.
7. (Optional) Configure the Sana Workspace.

   a) From the Sana Workspace, click the arrow next to the workspace name in the navigation menu.
   b) Click **Workspace Settings**.
   c) Configure optional settings. You can:
      - Disable web search.
      - Disable intercom support chat.
      - Disable specific third-party connectors. (Sana Enterprise only.)
      - Restrict agentic actions to approved email domains. (Sana Enterprise only.)

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Result

Users can immediately access Sana from Workday and use Sana capabilities.

Related Information
Examples
Sana Help Center
Workday Community: Getting Started with Sana
2025R2 Feature Release Note: Sana Core for Workday
2025R2 Feature Release Note: Sana Enterprise for Workday

Set Up AI Administrator Security Permissions

Prerequisites

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

1. Select your profile avatar on Workday Community.
2. Select **Profile**.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your **Subscription Service Agreement** value.

If the value is:

- *UMSA*, the feature is automatically available. Keep data contributions enabled to ensure full agent functionality. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, your organization must opt in to UMSA and enable this feature through Innovation Services.

UMSA is required for non-Production and Production tenants for Workday-Built agents. UMSA isn't required for non-Production tenants for self-built agents.

For information about how using agents impacts your Flex Credits, see: Workday Flex Credits Community page.

To use Sana Core and Sana Enterprise, you must:

- Purchase the Sana Enterprise product. This only applies to Sana Enterprise.
- Purchase the Core Human Capital Management or Core Financials product. This only applies to Sana Core.
- Sign the UMSA.

  Note: When you sign the agreement, Workday provides your organization with complimentary Flex Credits that you can use towards Sana Core for Workday. Once you reach the allotted complimentary Flex Credit consumption, you must sign the Workday Flex Credits and Platform Entitlement Policy to continue to use Sana Core for Workday.
- Sign the Workday Flex Credits and Platform Entitlement Policy. This only applies to Sana Enterprise.

Security: These domains in the System functional area:

- *Security Activation*
- *Security Configuration*

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Context

You can bundle all the necessary security configuration steps on the **Set Up AI Admin Security Permissions** task, which enables you to initiate back-end processing for your organization to use Workday AI features.

You can set up AI admin security permissions once for each tenant. The task enables you to grant security access for:

- Agent System of Record: Assign users access to manage and configure AI agent behavior and integrations in a central location.
- User Provisioning Workspace for Sana: Assign administrators to provision users to Sana.
- Platform Consumption Console: Assign users access to monitor and manage infrastructure resources that your agents use.
- Sana: Assign users as Sana administrators to configure Sana features in the Sana Workspace. Users with Sana administrator privileges can access and configure the Sana Workspace.

Workday sends a notification to security administrators in all your tenants to access and complete the task.

Note: The security configuration notification expires in 30 days.

You can configure sections of the **Set Up AI Admin Security Permissions** task separately, but Workday recommends using the task to ensure you meet all critical dependencies for your AI experience.

Security administrators must complete all sections. Once you submit the task, you can't edit it. You can manually update the configuration through the standard Workday security settings.

Note: When multiple administrators are configuring this task, Workday processes the first configuration submitted.

Steps

1. Access the **Action Required: Review and Configure the Security for Sana and Workday Agents** notification in Workday.

   Note: If administrators never received this notification or it expired and was removed after 30 days, you can access the **Notify Users to Configure Sana Agent Security** task to resend the security configuration notification. The user must have Modify permissions on the *Security Configuration* domain to receive the notification. The **Notify Users to Configure Sana Agent Security** task is only available in the tenant when you sign the UMSA. We don't resend the notification if an administrator has already completed the **Set Up AI Admin Security Permissions** task.
2. Click **Start Configuration**.
3. Complete the **Configure Security Policies** section on the **Configuration** tab:

   You only need to configure grids with an *Incomplete* status. We display a:

   - *Completed* status when domain security policies are configured. We don't display the **Security Group** and **View or Add Users to Security Group** columns in the grid.
   - *Completed with Exceptions* status when at least 1 of the domain security policies in the **Domain Security Policies** column isn't currently active or has pending changes.

Option	Description
Domain Security Policies	Displays all the domain security policies you need configure for each workspace.
Security Group	Select an existing user-based security group or create a new one. Workday adds users in those groups to the domain security policies listed in the **Domain Security Policies** column with View and Modify permissions.

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Option	Description
	For the Platform Consumption Console, we only require a security group with View permission on the *Management Dashboard: Platform Consumption Console* domain security policy. You can only add a security group to the *Management Dashboard: Platform Consumption Console* domain using this task if there are no existing security groups with View or View and Modify permissions configured on the domain security policy. Workday displays a *Completed* status on the **Platform Consumption Console** grid when these security configuration criteria are met.
View or Add Users to Security Group	Workday automatically displays the members of the security groups you selected in the **Security Group** column. You can add members only when you create a new security group or select a group that's not used in other policies and doesn't have members. You can't add or remove members when you select a security group that's currently used in other policies or has existing members.

When a domain is disabled and you access the **Set Up AI Admin Security Permissions** task:

- You can add security groups to the domain. Once you submit the changes on the task, this activates the domain.
- We display a *Completed* status if the domain has existing security groups.

4. Complete the **Activate Pending Security Policy Changes** tab.

   Review the security changes on the **Configuration** tab before activating the changes. To activate security policy changes in your tenant, you must have permission on the *Security Activation* domain.

   Select the **Confirm** check box and click **OK**.
5. Click **Done**.

Result

Workday automatically activates pending security policy changes and makes applicable tasks available. Workday might notify members of included security groups of additional tasks and actions they can take.

If assigning Sana administrator access to members in the security groups fails, we display a **Resubmit** button in the **Set Up Sana Administration** section of the **Configuration** tab. You can retry the provisioning by clicking the button. Workday attempts to assign the users with Sana administrator privileges.

Next Steps

(Optional) If you need to update the configuration on this task, access the standard Workday security settings to manually make the changes.

Related Information
Examples
Sana Help Center

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Workday Community: Getting Started with Sana
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2025R2 Feature Release Note: Sana Enterprise for Workday

Platform Consumption Console

About Platform Consumption Console

The **Platform Consumption Console** dashboard is available to all customers, both Main Service Agreement (MSA) and Universal Main Subscription Agreement (UMSA) subscribers, to monitor your usage of Workday offers.

All administrators can use the dashboard to review API requests and monitor document storage levels. Additionally, if you're a UMSA subscriber, you can use the dashboard to track agent usage and manage your Flex Credit balance. subscribers to monitor their usage of Workday offers and associated Flex Credit balances.

Flex Credits Access and Policy Requirements

UMSA subscribers can use the **Platform Consumption Console** dashboard to visualize their company's use of Flex Credits based on their usage of Workday offers included in the Workday Flex Credits Rate Card.

Flex Credits are only available to UMSA customers. UMSA customers are provided Flex Credits subject to either the Complimentary Flex Credits Policy incorporated in the UMSA Product Terms or the Flex Credits and Platform Entitlement Policy incorporated into an Order Form.

If you are subject to the Complimentary Flex Credits Policy, you must sign the Workday Flex Credits and Platform Entitlement Policy to continue using Workday AI agents once you have exhausted your complimentary Flex Credits.

Platform Consumption Console Overview

You can use the **Overview** page to view your credit balance, entitlements, and a consumption summary.

The **Flex Credit Overview** section displays your current credit balance and your available credits, including credits expiring in the near future.

The **Entitlement Overview** section displays:

Option	Description
Credit Consumption by Month	A month-over-month trend chart to help you track your consumption pricing.
Credit Consumption This Month	Your consumption for the current month compared to the previous month.
Credits by Environment	A breakdown of your credit consumption by environment.
Total Credit Consumption	A breakdown of your credit consumption sources, such as agents and Workday Data Cloud.

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Credit Balance and Entitlement Overview

The **Credit Balance** page displays your daily Flex Credit activity. The **Credit Entitlement** page displays your Flex Credit package purchase history, organized by these statuses:

Status	Definition
Active	Credits available for consumption.
Expired	Credits that have expired.
Inactive	Purchased credits that are available for consumption at a future date.

All Flex Credits are fungible and you can apply them universally across the Workday offers in the Rate Card to which you are entitled.

When Workday issues Flex Credits to amend your Flex Credit balance, you can review the adjustment to your Flex Credit balance in the **Adjustment Reason** column on the **All Packages** grid on the **Credit Entitlement** page. This column doesn’t display if you haven’t experienced a Flex Credit adjustment.

Rate Card

The **Rate Card** page displays the monetary value of your entitlements for credit usage. Workday calculates your credit consumption based on blocks of units rather than individual units.

Column	Definition
Applicable Environment	The environments where Workday offers are chargeable.
Consumption Meter	The unit of usage that's converted into credits.
Consumption Meter Definition	An explanation of what counts toward credit consumption.
In Blocks of (Units)	The number of units included in a chargeable block.
Credit Rate per Block	The rate charged for that block of units.

Any usage within a block's threshold consumes the full credit rate for that block.

Example: A skill has a block size of 10 units, and the block costs 5 credits. Each use of the skill consumes 1 unit. When you execute the skills for the first time, you spend 5 credits to purchase your first block of 10 units and have 9 units remaining in the block.

Later, you execute the skill 3 more times. Because you're still within your purchased block, you've now used 4 total units with 6 units remaining in the block, and you aren't charged more credits. You won't be charged again until you exceed the 10-unit block with your 11th execution, at which point you purchase another block of 10 units for 5 credits.

Understanding and Tracking Usage

Workday updates your usage daily starting at 2:00 PM UTC to reflect the previous day's usage. These calculations may take up to 3 hours to complete. Usage is based on the specific capabilities defined in the **Rate Card** page and the policy version associated with your agreement. Workday uses multiple components to determine your usage:

Component	Definition
Agents	Usage of agent skills and activities.

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Component	Definition
API Requests	Number of API requests. Note: API requests are displayed for informational purposes before you sign the Flex Credits and Platform Entitlement Policy. Flex Credits are not charged unless you have signed the policy.
Document Storage	Gigabytes (GB) of data stored. Note: Usage of document storage does not result in Flex Credit consumption but is subject to service limits. See Reference: Document, File Size, and Printing Limits.

Your policy provides a baseline usage allowance or embedded entitlement. After this embedded entitlement is used, Workday charges your usage against your available credit entitlements, prioritizing the credits that will expire first.

Use the **Consumption Usage** page to drill down and view a breakdown of consumption by service. In the subtabs, you can also view a visualization of execution volume by month. This visualization displays the total monthly count of billable events for agents, APIs, and skills. These events are the baseline metric Workday uses to calculate your overall Flex Credit consumption.

From the **Consumption Usage** subtabs, you can also review the **Consumption Log** and **Usage** grids, which display consumption and usage activity by:

- **Environment Type**
- **Total Credits Consumed**
- **Total Execution by Volume**
- **User Types**

You can click the **View Details** button in the **Usage** grid to review consumption details by agent. Access the Agent System of Record for detailed agent usage data. See About Workday Agents

Note: If your organization has signed a version of the Workday Flex Credits and Platform Entitlement Policy that does not include platform components or entitlements, you won't see those entitlements or usage on the **Platform Consumption Console** dashboard.

Flex Credit Estimator

You can use the **Flex Credit Estimator** task, secured to the *Management Dashboard: Platform Consumption Console* domain, to forecast your organization's annual Workday Flex Credit consumption. You can also access this task from the **Flex Credits > Credit Estimator** subtab in the **Platform Consumption Console** dashboard. The tool provides an itemized breakdown to facilitate planning and purchasing discussions by calculating estimates based on:

- Organization size
- Workday SKUs
- Generally available AI agents and capabilities

The estimator displays your platform entitlement, yielding a final net estimate after these entitlements are applied.

After you complete the task, you can review the formulas used for estimation, export your estimate to Excel or PDF for offline review, and, if eligible, purchase Flex Credits directly from Marketplace. You can also purchase Flex Credits by contacting your Workday Sales Representative.

Estimates are for informational purposes only, and input data is not considered Customer Content or Customer Data.

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Alerts and Budget

The **Alerts and Budget** page enables you to manage notifications and budget alert rules for agent Flex Credit consumption. Use these grids to monitor agent consumption and act before usage exceeds your limits:

Grid	Description
Default Alerts	View your notification contact and notification type for standard alerts. Workday automatically notifies you as you consume your active credit entitlement, sending alerts when your usage reaches 80%, 90%, and 100% of your credit threshold. Users with access to the *Management Dashboard: Platform Consumption Console* domain receive these notifications as your organization reaches its thresholds, and Workday displays a banner on the **Platform Consumption Console** dashboard. To configure your notification delivery settings, see Concept: Notifications.
Alerts and Budgets	Add and configure custom alerts for specific agents based on your weekly, monthly, or annual credit budget. You can select users with access to the *Management Dashboard: Platform Consumption Console* domain to receive these custom notifications. If you don't select specific users, notifications are sent to all users with access to the domain.

Workday doesn't deactivate offers on the **Platform Consumption Console** dashboard when you exceed your credit entitlement. To deactivate an agent, see Register and Configure Workday-Built Agents.

Non-Production Tenants

Workday enables the **Platform Consumption Console** dashboard in your Production and non-Production tenants. For most offers, use in non-Production tenants doesn't affect your Workday Flex Credit balance. While non-Production tenants track your consumption and display an informational Workday Flex Credit balance, for most offers Workday only applies usage from your Production tenant against your organization's Flex Credit balance.

Your Production dashboard displays Flex Credit consumption for specific agents in non-Production environments. This includes:

Agent	Environment
Adoption	Preview
Deployment	• Implementation • Preview • Sandbox Note: Using Deployment Agent in your Production tenant doesn't consume Flex Credits.

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Workday sends daily aggregate data across all of your non-Production tenants to the **Platform Consumption Console** dashboard. Example: When you use the **Platform Consumption Console** dashboard in your Sandbox tenant, the dashboard displays combined activity from all of your non-Production environments.

Adaptive Planning

Standalone Adaptive Planning customers can view a version of the **Platform Consumption Console** dashboard called **Agent Consumption** dashboard in their Adaptive Planning instance. You will need Planning Center permission to access the dashboard.

Related Information
Examples
The Next Level: Platform Consumption Console (PCC) Overview
Workday Community: Flex Credits FAQ
Workday Community: Flex Credits Overview
Workday Community: Workday Flex Credits

Set Up Security for Platform Consumption Console

Prerequisites
To complete these steps, you must be an implementer or security administrator.

Context

Note: The solutions described in this section are not part of the Workday Service. See Legal Notice for details.

Note: The data displayed in the **Platform Consumption Console** dashboard is usage data and is not considered customer content.

Universal Main Subscription Agreement (UMSA) or Main Service Agreement (MSA) subscribers can use the **Platform Consumption Console** dashboard to review their document storage data, which helps you monitor your storage levels. See Workday Community: Simplified Platform Access: Faster, More Predictable Workday AI Adoption.

UMSA subscribers can also use the **Platform Consumption Console** dashboard to visualize their company's use of complimentary and purchased Workday Flex Credits based on their usage of Workday offers.

Steps

1. Access the *Management Dashboard: Platform Consumption Console* domain in the System functional area.
2. From the related actions menu of the domain, select **Domain > Create Security Policy**.
3. Select the **Confirm** check box and click **OK**.
4. In the **Report/Task Permissions** grid, add security groups relevant to your organization.
5. Select the **View** check box and click **OK**.
6. Activate Pending Security Policy Changes.

Result

Selected security groups can now access the **Platform Consumption Console** dashboard.

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Related Information
Examples
The Next Level: Platform Consumption Console (PCC) Overview
Workday Community: Flex Credits FAQ
Workday Community: Flex Credits Overview
Workday Community: Workday Flex Credits

API Activity Reports

Workday delivers API activity reports that give you insight into historical drivers of high API and document-storage consumption. History begins building automatically, accruing up to 13 months of historical data over time. These reports supplement the Platform Consumption Console. See About Platform Consumption Console .

Note: Data for these reports are only displayed for US and EU customers.

Report	Description
API Activity Report - Monthly API Trends	Identifies monthly API request totals across all transports, filtered by the current user's billing ID. Metrics are calculated on the first day of each month for the preceding month. The report accumulates historical data monthly, capping at a maximum rolling window of 13 months.
API Activity Report - Top 10 API Requests	Identifies the 10 API request sources with the highest counts across all transports, filtered by the current user's billing ID. Metrics are calculated on the first day of each month for the preceding month.
API Activity Report - Top 10 IP Addresses	Identifies the 10 IP addresses with the highest request counts across all transports, filtered by the current user's billing ID. Metrics are calculated on the first day of each month for the preceding month.
API Activity Report - Top 10 API Names	Identifies the 10 APIs with the highest request counts across all transports, filtered by the current user's billing ID. Metrics are calculated on the first day of each month for the preceding month.

AI Data Contributions

Set Up Notifications for AI Feature Data Contributions

Context

Universal Main Subscription Agreement (UMSA) customers, as well as Main Subscription Agreement (MSA) customers preparing to convert to the UMSA, can configure the *AI Features and Third Party Notification* domain to receive these notifications.

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Notification Type	Delivery Timing	Purpose
AI Feature Availability	On the day of feature release.	Confirms the AI feature is available in your Production tenant and starts a 14-day period for you to manage your data contributions before data extraction begins.
Description or Technical Updates	Weekly, as needed due to updates.	Reports updates to feature descriptions and changes to data fields used by the AI feature.
Upcoming AI Features	30 days before release.	Provides a notice of upcoming AI features applicable to your purchased SKUs.
UMSA Conversion Completion	Upon completion of conversion to UMSA.	Notifies assigned workers that your organization's conversion from MSA to UMSA is complete.

Note: To determine your company's subscription agreement type:

1. Access your Community profile.
2. Beneath your name, click the **name of your company**.

In the **Subscription Service Agreement** field:

- **MSA** indicates the Main Service Agreement type.
- **UMSA** indicates the Universal Main Subscription Agreement type.

Steps

1. Edit Domain Security Policies.

   Add the relevant security groups to the *AI Features and Third Party Notification* domain in the Innovation Services functional area.

   If your organization is preparing to convert to the UMSA, ensure the workers who should receive notifications on conversion completion and AI feature availability have access to this domain.
2. Activate Pending Security Policy Changes.
3. Access the **Edit Tenant Setup - Notifications** task.

   On the **System** tab in the **Notification Delivery Settings** section, select a routing rule for the **Parent Notification Type** that includes email notifications.

   You can also override that setting for the **Ascend Notifications** notification type by selecting:

   - The **Override Parent Notification Type Settings** check box.
   - A routing rile that includes email notifications. See Create Notification Routing Rules.

   Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Result

Security group members will receive notifications about updates regarding your UMSA conversion and upcoming changes to AI features.

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Enable Innovation Services Feature and AI Data Contributions for MSA Customers

Context

You can use Innovation Services to access features that provide functionality beyond Workday's core products. When your organization subscribes to the Main Service Agreement (MSA), you can only access these features through Innovation Services. You must sign the Innovation Services Addendum (ISA) before you can enable Innovation Services features using these steps.

We use artificial intelligence (AI) in some Innovation Services features as part of their functionality. For these features, you must also enable data contribution, which Workday uses to provide better in-feature AI results.

Contact your Customer Success Manager, or have your Named Support Contact Administrator open a Customer Success request on Workday Community, to acquire and sign the order form to subscribe to Innovation Services.

Steps

1. Enable the Innovation Services functional area.
   See: Steps: Enable Functional Areas and Security Policies.
2. Edit Domain Security Policies.
   Configure the *Manage: Innovation Services* domain in the Innovation Services functional area.
3. Access the **Innovation Services and Data Selection Opt-In** report.
4. On the **Innovation Services Opt-In** task, select the check box for the feature you want to enable from the **Available Services** tab.
5. Click **Next**.
6. (Optional) On the **Maintain Innovation Services Data Selection Opt-In** task, select the check boxes for the data you want to contribute for AI.
   See: Workday AI Data Contributions to view which data contributions the feature requires.

Result

Workday enables the selected Innovation Services within 2 days, pending data extraction.

Note:

Some AI features may require additional data for activation. Example: Expense Protect requires 10,000 submitted expense report lines in your tenant. For feature-specific enablement requirements, see the corresponding Workday Guides topics or Workday AI Fact Sheets.

Next Steps

AI features that require data contributions don't function accurately in your Sandbox tenant. To test AI features that require data contributions before deploying them to your Production tenant, use your Implementation tenant.

Note: Data extraction is disabled in the Implementation tenant, which may affect AI feature performance.

You can use these tasks, secured to the *Manage: Innovation Services* domain, to initiate data extraction to test your configuration in your Implementation tenant:

Task	Description
Maintain Weekly Machine Learning Activation for Implementation Tenant	Initiates weekly data extractions. Selections don't persist through tenant refreshes.

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Task	Description
Run On-Demand Machine Learning Activation for Implementation Tenant	Initiates on-demand data extracts. When you run this task, you also enable your tenant for weekly data extracts to keep your models up to date.

To ensure accurate testing, Workday recommends your refresh your Implementation tenant before running these tasks.

Related Information
Examples
Workday Community: Workday AI Gateway
Workday Community: Workday Innovation Services
Workday Community: Workday Innovation Services - Frequently Asked Questions

Review AI Features and Enable Agents After Transitioning to Universal Main Subscription Agreement

Context

You can enable Workday AI agents after you opt in to the Universal Main Subscription Agreement (UMSA).

Note: Some agents may have specific setup requirements. See agent-specific set up topics in the Workday AI guide.

Steps

1. Manage Workday AI Data Contributions for Universal Main Subscription Agreement Customers .
   Under the UMSA, data contribution is enabled by default. We recommend you review and manage your data contributions using the **Data Contribution for Workday AI** report. See Workday AI for Universal Main Subscription Agreement Customers .
2. Set Up Agent System of Record .
   The Agent System of Record is the foundation for managing agents.
3. Register and Configure Workday-Built Agents .

Result

Users in the assigned security groups can access agents.

Next Steps

Set Up Security for Platform Consumption Console and review About Platform Consumption Console .

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Manage Workday AI Data Contributions for Universal Main Subscription Agreement Customers

Prerequisites

- Your organization must be on the Universal Main Subscription Agreement or in the process of converting from the Main Subscription Agreement (MSA) to UMSA.

  Note: To determine your company's subscription agreement type:

  1. Access your Community profile.
  2. Beneath your name, click the **name of your company**.

  In the **Subscription Service Agreement** field:

  - **MSA** indicates the Main Service Agreement type.
  - **UMSA** indicates the Universal Main Subscription Agreement type.
- Security: These domains in the Innovation Services functional area:
  - *Manage: Data for ML Features*
  - *View: Data for ML Features*

Context

When you subscribe to the UMSA, you automatically enable data contributions for AI features. During and after the conversion from MSA to UMSA, you can access the **Data Contribution for Workday AI** report to manage your data contributions for AI features by product line or AI feature.

For more information on feature-level contributions, see Workday AI Data Contributions .

Steps

1. Access the **Data Contribution for Workday AI** report.
2. Complete the report:

Field	Description
Disallow Data Contribution	When you select this check box, Workday: • Disables data contribution for the associated product line or AI feature. • Deletes your past data contributions within 30 days.
Data Details	Click **View Data Collected** to view definitions for the types of data contributed to Workday.
View Upcoming Contribution Changes	Click **Contribution Changes** to view upcoming changes to the feature's required data contributions.
Countries Excluded from Data Collection by End User Location	At the AI feature level, select countries that you would like to exclude from data contributions.

3. Click **OK**.

Result

When you disable data contributions, Workday stops collecting new data and deletes your past contributions within 30 days.

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Note:

When you disable data contributions, you might impact the performance of certain AI features, including a degraded experience to the feature not functioning at all.

To understand how disabling contributions may affect a feature, see the feature's Workday AI Fact Sheet.

Next Steps

Note: You can manage data contributions for Enhanced Features by Product Line or AI feature through the **Data Contribution for Workday AI** report. For any Enhanced Feature that is not included in the **Data Contribution for Workday AI** report, customers can opt out of data contribution for training and improvement by initiating a Workday support request.

Related Information
Concepts
Workday AI for Universal Main Subscription Agreement Customers

Workday AI for Universal Main Subscription Agreement Customers

Note: To determine your company's subscription agreement type:

1. Access your Community profile.
2. Beneath your name, click the **name of your company**.

In the **Subscription Service Agreement** field:

- **MSA** indicates the Main Service Agreement type.
- **UMSA** indicates the Universal Main Subscription Agreement type.

Workday often relies on data contributions to deliver artificial intelligence (AI) features. For customers who are subject to the UMSA, Workday automatically enables data contributions for AI features in your purchased SKUs. Workday may use this data to train or enhance the associated AI feature.

On the **Data Contribution for Workday AI** report, data extraction and feature functionality occur in stages based on your situation:

Scenario	Timeline
New UMSA customers	Once your tenant starts contributing data, it takes an initial 14-day extraction period before AI features become functional and provide recommendations.
Transitioning from the MSA to UMSA	AI features that you already use remain fully functional without interruption. They continue based on your previous MSA data extracts, which persist for up to 14 days while the new UMSA data extracts take effect, unless you opted out in the **Data Contribution for Workday AI** report during the extraction period.
New AI feature releases for UMSA customers	Workday displays new AI features in the task immediately upon release, but data extractions don’t begin until 14 days after the release date. This provides a window where you can review or disable data contributions for the feature before extraction occurs.

Note:

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Some AI features may require additional data for activation. Example: Expense Protect requires 10,000 submitted expense report lines in your tenant. For feature-specific enablement requirements, see the corresponding Workday Guides topics or Workday AI Fact Sheets.

Data Contributions

UMSA customers and MSA customers in the process of converting to the UMSA can manage their data contributions using the **Data Contribution for Workday AI** report, secured to the *Manage: Data for ML Features* and *View: Data for ML Features* domains in the Innovation Services functional area. Workday populates data contribution options in the report within 24 hours of the UMSA effective date. See Manage Workday AI Data Contributions for Universal Main Subscription Agreement Customers .

During the conversion from MSA to UMSA, you can access the **Data Contribution for Workday AI** report to manage data contribution preferences ahead of data extraction. Workday also adds a banner to the report during this conversion window, enabling you to monitor the 14-day period before data extraction begins.

Workday groups data contributions by the AI feature that uses the data, so you only share the specific data needed for each feature. You can manage contributions for each feature individually or at the product line level.

To view the data categories needed for each AI feature, see Workday AI Data Contributions .

When you disable data contributions for an AI feature or a product line, you no longer contribute data and Workday deletes your past data contributions within 30 days.

Note:

Disabling data contributions can impact the performance of certain AI features. The impact of disabling data contributions will vary by feature, from a degraded experience to the feature not functioning at all.

To understand how disabling contributions may affect a feature, see the feature's Workday AI Fact Sheet.

Note: You can manage data contributions for Enhanced Features by Product Line or AI feature through the **Data Contribution for Workday AI** report. For any Enhanced Feature that is not included in the **Data Contribution for Workday AI** report, customers can opt out of data contribution for training and improvement by initiating a Workday support request.

These reports can also help you view contribution details:

- **AI Features Data Details**, which is secured to the *View: Data for ML Features* domain and displays the data contributions associated with all AI features available across Workday, filtered by product line.
- **Intelligent Features Report**, which is secured to the *Manage: Data for ML Features* and *View: Data for ML Features* domains and displays AI features for all SKUs and AI features for your purchased SKUs.

AI Feature Notifications

MSA and UMSA customers can enable notifications about upcoming changes to AI features by configuring the *AI Features and Third Party Notification* domain in the Innovation Services functional area. See Set Up Notifications for AI Feature Data Contributions .

Members of security groups with access to the *AI Features and Third Party Notification* domain receive these notifications:

Notification Type	Delivery Timing	Purpose
AI Feature Availability	On the day of feature release.	Confirms the AI feature is available in your Production tenant and starts a 14-day period for you to manage your

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Notification Type	Delivery Timing	Purpose
		data contributions before data extraction begins.
Description or Technical Updates	Weekly, as needed due to updates.	Reports updates to feature descriptions and changes to data fields used by the AI feature.
Upcoming AI Features	30 days before release.	Provides a notice of upcoming AI features applicable to your purchased SKUs.
UMSA Conversion Completion	Upon completion of conversion to UMSA.	Notifies assigned workers that your organization's conversion from MSA to UMSA is complete.

Workday doesn't extract data for new AI features until 14 days after the Workday release. You can disable data contributions the day of the AI feature release.

Testing AI Features

AI features that require data contributions don't function accurately in your Sandbox tenant. To test AI features that require data contributions before deploying them to your Production tenant, use your Implementation tenant.

Note: Data extraction is disabled in the Implementation tenant, which may affect AI feature performance.

You can use these tasks, secured to the *Manage: Data for ML Features* domain, to initiate data extraction to test your configuration in your Implementation tenant.

Task	Description
Maintain Weekly Data Contribution Activation for Implementation Tenant	Initiates weekly data extractions. Selections don't persist through tenant refreshes.
Run On-Demand Data Contribution Activation for Implementation Tenant	Initiates on-demand data extracts. Selections don't persist through tenant refreshes. When you run this task, you also enable your tenant for weekly data extracts to keep your models up to date.

To ensure accurate testing, Workday recommends you refresh your Implementation tenant before running these tasks.

Related Information
Examples
Workday Community: Streamlining Feature Adoption and the Workday AI Home Page
Workday Community: Workday AI Gateway

Workday AI Data Contributions

Based on your organization's subscription service agreement, these features require you to contribute your tenant data to maximize the benefits of artificial intelligence (AI) and machine learning (ML).

- Workday AI Data Contributions
- Cross Application Services: Intelligent Core Generally Available Features

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- Workday AI Data Contributions
- Workday AI Data Contributions
- Financials: Receipt Scanning for Expenses
- HCM: HCM Machine Learning GA Features
- HCM: Workforce Management Machine Learning Services
- Payroll: Payroll Machine Learning GA Features
- People Experience: User Experience Machine Learning
- Spend Management: Spend Management Machine Learning GA Features

Adaptive Planning: Planning GA Features

ML Feature	Data Category	Consideration
Planning Agent	Operational Telemetry and Agent Traces	Workday collects operational telemetry and agent execution traces to: • Monitor system behavior and performance. • Improve the product experience, guide manual improvements, and ensure system reliability over time. Workday doesn't use the data to retrain or fine-tune the pre-trained foundation model . You can disable the collection of this trace data at any time by selecting **Administration > General Setup > Disallow Data Contribution** in Adaptive Planning. Disabling the option can impact our ability to troubleshoot any unexpected behavior with agent responses.

Cross-Application Services: Intelligent Core Generally Available Features

ML Feature	Opt-In Data Category	Considerations
Machine Learning Recommendations for Change Job	**Custom Organization Data** **Supervisory Organization Data** **Staffing Event Data** **Worker Profile Data**	You can't use country exclusion for the Supervisory Organization Data and Custom Organization Data categories.

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Decision Intelligence: Decision Intelligence GA Features

ML Feature	Data Category	Consideration
Decision Intelligence	Operational Telemetry and Agent Traces	Workday collects operational telemetry and agent execution traces to: • Monitor system behavior and performance. • Improve the product experience, guide manual improvements, and ensure system reliability over time. Workday doesn't use the data to retrain or fine-tune the pre-trained foundation model. You can disable the collection of this data: • For Adaptive Planning standalone instances, select **Administration > General Setup > Disallow Data Contribution** in Adaptive Planning. • For platform customers, access the **Data Contribution for Workday AI** report to disable your data contribution. See Manage Workday AI Data Contributions for Universal Main Subscription Agreement Customers .

Financials: Financial Management Generally Available Machine Learning Features and Third Party Services

Data Category	Consideration
Customer Payment Data	To enable Intelligent Customer Payment Matching, you must have customer payment transaction data in the past 30 days. This functionality provides beneficial recommendations only when you process customer payments in Workday.
Expenses Data	To use Expense Protect, you need at least 10,000 expense report lines in your tenant. When users submit expenses, Workday automatically runs Expense Protect evaluate them

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Data Category	Consideration
	and provide risk levels, recommendations, and insights.
Journal Line Data	You need at least 12 months of existing historical data to use the Journal Insights feature.
Supplier Invoice Data	You can enable ML suggestions for your 5 most commonly used selections for these worktags on supplier invoice lines: • Cost center • Location • Region • Spend category Note: After you opt in to the Innovation Service, you must enable worktag recommendations on supplier invoice documents in the **Supplier Accounts Options** section on the **Edit Tenant Setup – Financials** task.
Accounts Receivable Data	To enable customer overpayment reason and worktag recommendations, you need a minimum of 3,000 historical customer overpayments. To enable recommendations for customer invoice lines, you need a minimum of 3,000 customer invoices with the revenue category and sales item fields.

Financials: Receipt Scanning for Expenses

Data Category	Consideration
Receipt Scanning for Expenses	You can scan receipts in PDF, JPG, TIFF, and PNG file formats.

HCM: HCM ML Features and Third-Party Connectors GA

To use ML for these features, you must enable the **HCM ML Features and Third Party Connectors GA** service and enable data contribution for each feature.

ML Feature	ML Categories for Feature	Opt-In Data Category	Considerations
ML for Worker Profile and Skills	• **Skills Cloud** • **Skills Suggestions and Verification**	• **Job Requisition Data** • **Talent Profile Data** • **Worker Profile Data**	• Workday recommends enabling Skills Cloud to maintain the skills data of your workers. • You can't use country exclusion for the Talent Profile Data and Job

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ML Feature	ML Categories for Feature	Opt-In Data Category	Considerations
			Requisition Data categories. • Workday recommends you opt in to contributing data for the Skills Cloud and Skills Suggestions and Verification categories.
ML for Recruiting	• **Suggested Jobs for External Candidates** • **Suggested Skills for External Candidates** • **Suggested Skills for Job Requisitions**	**Job Requisition Data**	You can't use country exclusion for the Job Requisition Data category.
ML for Learning Core	• **Learning Skills Tagging** • **Machine Learning Recommended For You** • **Related Content Recommendations** • **Based on Your Skills to Develop**	**Learning Data**	• Use the **Edit Tenant Setup - HCM** task to configure the **Related Content Recommendations** worklet. • Use the **Maintain Learner Experience** task to configure the **Based on Your Skills to Develop** and **Machine Learning Recommended For You** worklets. • You must opt into the Learning Data category to use the **Based on Your Skills to Develop** worklet. Workday provides a non-ML version of

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ML Feature	ML Categories for Feature	Opt-In Data Category	Considerations
			recommendations when you don't opt in. • You must opt into the Learning Data category to use the **Related Content Recommendations** worklet. • You must opt into the Learning Data and Worker Profile Data categories to use the **Machine Learning Recommended For You** worklet. • Workday updates ML data every 24 hours, Monday through Friday.
ML for Talent Marketplace	**Talent Marketplace**	• **Demographics Data** • **Job Requisition Data** • **Learning Data** • **Projects Data** • **Skills Data** • **Talent Opportunity Marketplace Data** • **Worker Profile Data**	• You can't use country exclusion for the Job Requisition Data and Talent Opportunity Marketplace Data categories. • You must enable Talent Opportunity Marketplace and Worker Profile Data. For details about which features depend on these data categories, see Steps: Set Up Opportunity Marketplace in Career Hub.
ML for Career Hub	**Career Hub**	• **Job Requisition Data** • **Learning Data** • **Talent Opportunity**	• Country exclusion is unavailable for the Job Requisition Data, Talent

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ML Feature	ML Categories for Feature	Opt-In Data Category	Considerations
		Marketplace Data • **Talent Profile Data** • **Worker Profile Data** • **Skills Data**	Opportunity Marketplace Data, and Talent Profile Data categories. • Talent Profile Data and Worker Profile Data are required for Talent Optimization in **Career Hub**. For details about which features depend on these data categories, see Steps: Set Up Talent Optimization in Career Hub.
ML for Manager Insights Hub	**Manager Insights Hub**	• **Learning Data** • **Talent Opportunity Marketplace Data** • **Worker Profile Data**	• Country exclusion is unavailable for the Talent Opportunity Marketplace Data category. • The Suggested Opportunities section of Manager Insights Hub uses ML to make personalized suggestions. To access this functionality, opt in to the HCM Machine Learning GA Features service and relevant data categories, and enable Skills Cloud and Interests.

Note: If you enabled Skills Cloud through the Workday Graph innovation service, your data selection and Skills Cloud configuration remain valid.

You can access the **Innovation Service Data Details** report to drill into the fields tied to the HCM ML Features and Third Party Connectors GA service.

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HCM: Workforce Management Machine Learning Services

Data Category	Consideration
Time Configuration Data	• You must contribute data from this category to use the Workday Time Anomaly feature. • Workday updates the data used to train the ML model weekly with all time entry template, work schedule calendar, and time calculation data.
Worker Data	• You must contribute data from this category to use the Workday Time Anomaly feature. • Workday updates the data used to train the ML model weekly with limited worker organization and job data for workers who have entered time.
Historical Schedule Block Data	• You must contribute data from this category to use the Workday Time Anomaly feature. • Workday updates the data used to train the ML model weekly with historical schedule blocks for workers.
Worker Time and Absence Data	• You must contribute data from this category to use the Workday Time Anomaly feature. • Workday updates the data used to train the ML model weekly with all workers' time block, time block history, time off entry, and time review event data.
User Feature Delivery Data	• You can contribute data in your tenant from the User Feature Delivery Data category to help Workday detect time anomalies. • To see which data from this category you're contributing, run the **Innovation Service Data Details** report for Workforce Management Machine Learning Services. • Country exclusion is unavailable for this category.

Payroll: Payroll Machine Learning GA Features

Select **Payroll: Payroll Machine Learning GA Features** from the **Innovation Services Valid for Maintain Data Opt-In** field. Select the **Opt In** check box for these categories:

Data Category	Consideration
Anomalous Payroll Results	You must contribute data from this category to use the Workday Pay Anomalies feature.
Payroll Data	• You must contribute data from this category to use the Workday Pay Anomalies feature. • We recommend that your tenant has at least 6 pay periods or more of historical payroll data before opting into this feature. This ensures there's enough training data for the ML model.

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Data Category	Consideration
Payroll Data (Historical)	• You must contribute data from this category to use the Workday Pay Anomalies feature. • We recommend that your tenant has at least 6 pay periods or more of historical payroll data before opting into this feature. This ensures there's enough training data for the ML model.
Pay Anomalies Validations	You must contribute data from this category to use the Workday Pay Anomalies feature.
Previous States of Payroll Results (Historical)	• You must contribute data from this category to use the Workday Pay Anomalies feature. • We recommend that your tenant has at least 6 pay periods or more of historical payroll data before opting into this feature. This ensures there's enough training data for the ML model.
Worker Data	You must contribute data from this category to use the Workday Pay Anomalies feature.
P45 Tax Form Scanning	You must select this category to use the Workday P45 Tax Form Scanning feature.

Note: To enable Pay Anomalies functionality and build tenanted models, you must opt in to these categories:

- Anomalous Payroll Results
- Payroll Data
- Payroll Data (Historical)
- Pay Anomalies Validations
- Previous States of Payroll Results (Historical)
- Worker Data

Not selecting these data categories will result in the ML model failing to build and deploy as designed. The Pay Anomalies feature won't be fully functional without these models.

Workday recommends that you don't opt out of the innovation service once you run the Pay Anomalies report to view predictions. Opting out disables the feature and causes data synchronization issues.

People Experience: User Experience Machine Learning

Data Category	Consideration
Workday-Generated User Information	Workday displays the 3 recommended tasks in the **Quick Tasks** section on the home page based on: • The trends occurring across tenants. • User activity in your production tenant.
Knowledge Management Articles	You can contribute data in your tenant from the Knowledge Management Articles category, enabling Workday to recommend relevant articles to users.
Search Query	You can contribute data in your tenant from the Search Query category to provide more relevant

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Data Category	Consideration
	and personalized search results when using Workday Search.

Spend Management: Spend Management Machine Learning GA Features

Data Category	Consideration
Spend Transaction Data	• If you opted in before Workday added support for purchase orders, Workday displays an **Opt In to Additional Data** check box. Select this check box to contribute data for purchase order recommendations. • When you opt out of the data contribution, Workday purges your data within 2 weeks.

Related Information
Examples
Workday Community: Workday Innovation Services

FAQ: Transitioning from Innovation Services Addendum (ISA) to the Universal Main Subscription Agreement (UMSA)

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Why can I no longer access Innovation Services reports and security domains?	When you sign the Universal Main Subscription Agreement (UMSA), Workday replaces the reports, tasks, and security domains for managing Innovation Services with those for managing Workday AI features on the UMSA. See Workday AI for Universal Main Subscription Agreement Customers Example: Instead of using the **Innovation Services and Data Selection Opt-In** report (secured to the *Manage: Innovation Services* domain) to manage Workday AI features, you can use the **Data Contribution for Workday AI** report (secured to the *Manage: Data for ML Features* and *View: Data for ML Features* domains). UMSA customers can disregard all information regarding Innovation Services.
Do I need to opt in to Workday AI features on the UMSA, as I did on the Innovation Services Addendum (ISA)?	Most AI and third-party integration features are automatically available under the UMSA. To manage these features, see Manage Workday AI Data Contributions for Universal Main Subscription Agreement Customers .
How do I validate that features I enabled under the ISA remain enabled under the UMSA?	Access the **Data Contribution for Workday AI** report (secured to the *Manage: Data for ML Features* and *View: Data for ML Features* domains) to review Workday AI features enabled under the UMSA and verify that default settings meet your organization's needs. For instructions on managing feature enablement, see Manage Workday AI Data Contributions for Universal Main Subscription Agreement Customers . For considerations on the impact of managing your features, see Workday AI Data Contributions .
How do I validate that third-party integrations enabled under the ISA are enabled under the UMSA?	To validate integrations that used Innovation Services, access the **All Integration Systems** report (secured to the *Integration Reports* domain) to confirm their status.
Is data contribution for Intelligent Application features enabled by default under UMSA?	Workday enables data contribution for Intelligent Application features by default.
How can I opt out of data contribution for Workday AI features?	To disable data contribution, you can use the **Data Contribution for Workday AI** report (secured to the *Manage: Data for ML Features* and *View: Data for ML Features* domains) to opt out of specific product lines or individual features. Note: If an Intelligent Application doesn't require data contributions, you don't have to take any action.

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<table>
<tr><td></td><td>Note: You can manage data contributions for Enhanced Features by Product Line or AI feature through the Data Contribution for Workday AI report. For any Enhanced Feature that is not included in the Data Contribution for Workday AI report, customers can opt out of data contribution for training and improvement by initiating a Workday support request.</td></tr>
<tr><td>How has security configuration changed for AI features under UMSA?</td><td>Workday updated the security domains. You must ensure you have enabled the relevant security groups and added them to the Manage: Data for ML Features and View: Data for ML Features domains.

These domains replace the previous Manage: Innovation Services domain.</td></tr>
<tr><td>What additional security domains should I configure to prepare for conversion to the UMSA?</td><td>Configure these domains in the Innovation Services functional area:<table><tr><th>Domains</th><th>Description</th></tr><tr><td>AI Features and Third Party Notification</td><td>This domain enables assigned workers to receive notifications upon conversion completion and when AI features become available.</td></tr><tr><td>• Manage: Data for ML Features
• View: Data for ML Features</td><td>These domains enable administrators to manage your data contribution preferences. During and after your conversion to the UMSA, administrators can access the Data Contribution for Workday AI report to configure data contribution preferences and monitor the 14-day period before data extraction begins.</td></tr></table></td></tr>
<tr><td>How can I view the specific data Workday uses for AI features?</td><td>Click View Data Collected on the Data Contribution for Workday AI report (secured to the Manage: Data for ML Features and View: Data for ML Features domains) to access these details.</td></tr>
<tr><td>How does Workday notify me about new or updated AI features?</td><td>If you have enabled notifications about upcoming changes to AI features, Workday sends a 30-day notification before delivering new or updated AI</td></tr>
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	features to your Preview and Production tenants. Workday also notifies you on the day of the release. See Set Up Notifications for AI Feature Data Contributions .
What happened to the Media Cloud Addendum? Does my existing content (like SCORM/AICC files) still work?	Yes, your existing packaged content will continue to operate. The legal and contractual terms have shifted from the old addendum to the relevant terms within the Platform and Product Extensions Product Terms under your UMSA.
What configurations do I need to review for Workday Learning?	If you use third-party content, you must verify your Learner Name configuration to ensure content launches correctly. After transitioning to UMSA, access the **Edit Tenant Setup - HCM** task and select the **Send Learner Name to Third-Party Content Provider** check box. See Steps: Set Up Packaged Content for Learning.
How do I submit support requests for subscription management (such as new licenses)?	In Workday Community, route subscription management requests as a Customer Success Request.

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