

WORKDAY AI AGENTS GUIDE

WHAT IS WORKDAY ILLUMINATE?

Illuminate = the AI built into Workday, trained on **800B+ transactions a year**.

Unlike chatbots that only answer, agents can:

- ✓ Plan multi-step work
- ✓ Take action in Workday
- ✓ Follow your security rules
- ✓ Ask a human when unsure
- ✓ Learn your processes
- ✓ Finish whole tasks

Old AI: suggests

Agents: do the work

THE AGENT LOOP



Example: "File my Chicago trip expenses" — drafted, coded, and queued for your OK.

FROM FEATURES TO AGENTS

Level	What the AI does
0	Automation rules
1	Predictions & insights
2	Generative AI drafts
3	Task agents — one job
4	Role agents — a whole role
5	Managed digital workforce

MEET THE AGENTS



TASK AGENTS vs ROLE AGENTS

Task agent	Role agent
Does one job	Owns a set of skills
Follows fixed steps	Adapts to the situation
Best for: routine work	Best for: roles

Workday bets on role agents — skills, not scripts.

WHAT IT MEANS FOR YOU

Employees: ask in plain language, get instant answers
Managers: approvals arrive prepped & summarized
Finance: faster close, anomalies flagged
HR: sourcing & scheduling on autopilot

GOVERNANCE: AGENT SYSTEM OF RECORD

Manage AI agents like employees:

- ✓ Register every agent
- ✓ Set its permissions
- ✓ Monitor activity & cost
- ✓ Measure its impact
- ✓ Keep humans in the loop

THE ILLUMINATE STACK

DATA CORE	AI FOUNDATION	AGENTS	CONTROL
800B+ transactions HR + finance in one	Illuminate models Built into the flow of work	Workday + partner agents Role & task based	Agent System of Record Human approvals

TOP USE CASES

- Expense filing
- Candidate sourcing
- Financial close
- Employee Q&A
- Contract review

EXEC SCORECARD

- ✓ Hours saved per task
- ✓ Adoption rate
- ✓ Override rate
- ✓ Cost per agent

WATCH OUT FOR

- ✗ Confident wrong answers
- ✗ No governance plan
- ✗ Skipping change management
- ✗ Auto-approving blindly

START-SMART CHECKLIST

- ✓ Pick 1-2 agents first
- ✓ Keep human approvals on
- ✓ Train your people
- ✓ Measure before scaling

WHAT'S NEXT (2027-2030)

- Agents managed alongside employees
- Agents span HR + finance end-to-end
- Conversation replaces clicks
- Every role gets a digital teammate

ONE-LINE FORMULA

Workday AI = Your Data + Agents + Guardrails + Humans In The Loop

9Nation.com

