

Workday Help

Employees expect consumer-grade support that is as instant and personalized as their favorite apps. Workday Help modernizes HR service delivery by providing a fast, simple, and intelligent support experience that gives everyone time back in their day. By unifying knowledge and case management within a single, secure platform, it eliminates the friction of siloed tools and manual processes.

Powered by Workday AI, Workday Help delivers personalized answers directly in the flow of work, whether in Workday, Slack, or Microsoft Teams. By automating repetitive queries and providing automated assistance for case resolution, Workday Help frees HR to focus on strategy while ensuring employees get accurate, confidential support.

Seamless self-service for a global workforce

Workday modernizes the information search with a knowledge-driven experience that eliminates the friction of navigating complex internal sites.

Streamline Content Creation

Easily create, organize, and maintain HR knowledge in a platform your team already uses to enhance productivity. Automate your content creation process by using AI to draft and translate information that can be updated in real time with video, hyperlinks, and direct access to associated tasks for a global workforce.

Instant Answers, Fewer Tickets

When your employees have an HR question, a simple search will return relevant information in their preferred language through knowledge articles, HR videos, suggested supplemental articles, and related links, reducing the need for case creation. Workday Help provides you with a comprehensive knowledge management solution that puts HR information at employee fingertips.

Conversational AI at Work

Pairing Workday Help with the Workday Self-Service Agent boosts self-service and case deflection. This conversational AI agent instantly summarizes information from Workday and third party sources, prefills forms, and completes tasks directly within the chat.

Key Benefits

- Boost organizational efficiency with a single source for all HR needs
- Deliver fast, 24/7, accessible, and accurate support that elevates the overall employee experience
- Eliminate manual triage and free up your HR teams for higher-value work
- Accelerate resolution and improve time-to-first-response through intelligent case automation
- Ensure that confidential cases are handled securely and maintain compliance standards.

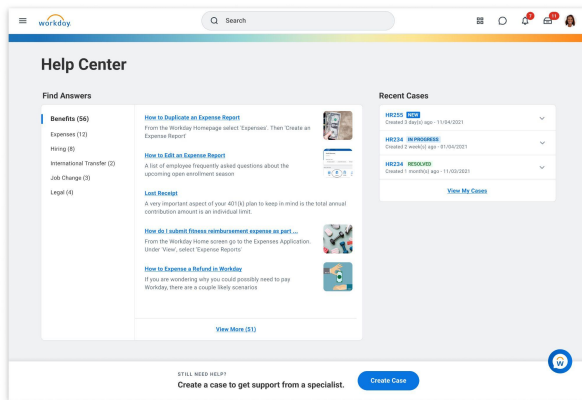
Key Features

Knowledge Management

- Intuitive, relevant search
- Machine-learning-enabled intelligent answers
- Access from anywhere, including mobile
- AI-assisted content generation and translation
- Collaborate on articles between content authors before they are published
- Content version control
- Content usage tracking
- Bulk content uploads
- Article Lifecycle Management
- Article Approval Workflow

Case Management

- Interactive case management workspace
- Automated case routing and rules engine
- Internal case notes and attachments
- Contextual Workday Human Capital Management (HCM) data on case solver view
- Security for confidential cases
- Configurable service-level-agreements (SLA's)
- SLA schedules, rules, indicators, and reporting
- Message templates
- Automate the entire case lifecycle, from triage to content gap analysis



Caption/Alt text: Screenshot of the Help center, displaying service teams, knowledge articles, and cases, all in one view

Results

- Reduced need for case creation through an intuitive self-service-first approach
- Increased HR efficiency with greater visibility into case history and employee data
- Streamlined content management in a single system of record, making your data easy to maintain.

Intelligent support for high-speed resolution

Workday accelerates HR support with an AI-driven case management experience that eliminates the friction of manual routing and administrative overhead.

Frictionless Support for Employees

Employees can open a case in the moment, via knowledge articles, email, the Workday Self-Service Agent, business processes, or natural workspaces like Slack and Microsoft Teams, across both desktop and mobile. They can track progress and communicate with HR in real-time, ensuring they never have to chase an update.

AI-Assisted Resolution for HR Teams

Built within Workday Help, the Workday Case Agent automates the HR service delivery lifecycle from start to finish:

- **Intelligent Triage:** Automatically classify cases by case type, ensuring every request is routed correctly from the start.
- **AI-Driven Workload Distribution:** Workday Help evaluates solver availability, capacity, and expertise to auto-assign cases, reducing errors in misassignment and improving SLA adherence.
- **Guided Resolution:** Case solvers receive AI-generated and translated summaries and suggested responses based on historical data, decreasing resolution times by an estimated 15%

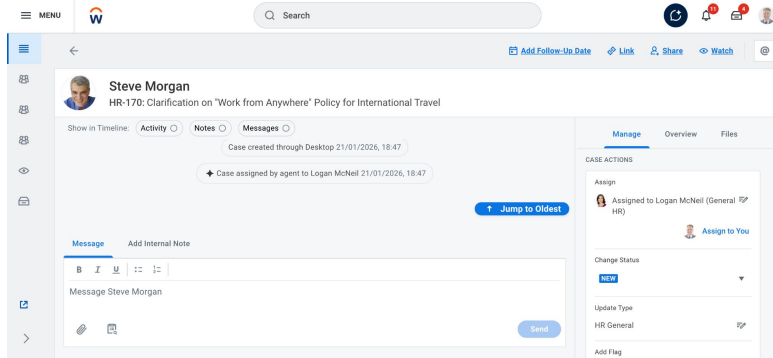
Secure and Confidential Handling

Sensitive HR cases are protected by Workday's reliable security model. Configurable permissions ensure that confidential information is only accessible to authorized individuals, maintaining compliance.

The Advantage of a Unified System

Workday Help is natively embedded within the Workday Human Capital Management (HCM) platform, providing a single source of truth for all people data. The unified Workday platform ensures that sensitive information never leaves the system, maintaining top-tier security and compliance.

By using real-time worker data, you can deliver highly personalized experiences and tailor content visibility to specific groups. This extends into case management, where organizations can define case types based on geography or complex structures. When a case begins, Workday provides HR teams with immediate context by pulling employee data directly into the case workspace



Caption/Alt text: Screenshot of an auto-assigned case in the case workspace where HR teams can view contextual employee information to more quickly resolve the case

Core Capabilities

User Experience

- Increase task completion rates by providing in-context help for employees to access relevant information without leaving their current workflow
- Deliver a personalized experience to every worker by surfacing relevant information and guidance in their natural flow of work
- Help is available on any device, 24/7

Knowledge Management

- Surface relevant articles based on employee specific role, location, & history, providing instant answers and fostering autonomy
- Ensure workers can access HR information in their native language instantly by using Workday AI for automated content creation and translation
- Integrated workflows allow multiple authors to review and version control articles before publishing

Case Management

- Empower HR teams to work more efficiently with a simplified case management workspace that brings all necessary employee data and case history into a single view
- Improve case resolution times by using intelligent case routing rules and case lists that automatically direct employee questions to the most qualified support expert and allow customers to secure cases to the appropriate teams
- Standardize support by enabling seamless collaboration between case solvers and providing ready-to-use message templates for consistent communication
- Empower solvers to tailor their workspace by adding high-value fields like follow-up dates, case flags, labels, and case owner locations, to the standard case list for streamlined navigation and faster discovery



Core Capabilities

Reporting & Insights

- Real-time dashboards track SLA performance and team responsiveness
- Provide insights into which knowledge articles are most effective at deflecting cases and which need improvement
- Use real-time data to identify organizational friction points and monitor high case volumes

Unified Ecosystem

- Natively unified with Workday HCM, giving case solvers immediate access to employee full history, role context, and job data without switching systems
- As roles change, Workday automatically updates approval chains and business processes to maintain compliance
- Security and confidentiality are inherently maintained for sensitive HR cases
- Eliminate the data lag associated with third-party tools, where HR data must be constantly synced via APIs.

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