Workday Brings Sana Self-Service Agent for HR and Finance Into Microsoft 365 Copilot

Sana Self-Service Agent from Workday is Now Available in Copilot, Enabling Employees to Get Answers and Take Action Without Leaving Their Flow of Work

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PLEASANTON, Calif., May 13, 2026 /PRNewswire/ -- Workday, Inc. (NASDAQ: WDAY), the enterprise AI platform for managing people, money, and agents, today announced that the Sana Self-Service Agent from Workday is now available in Microsoft 365 Copilot. The new integration enables employees and managers to get answers to HR and finance questions and complete everyday tasks directly inside Microsoft 365, without switching apps, while organizations maintain the security, compliance, and control they expect from Workday.

Today, employees and managers often jump between email, chat, portals, and help desks just to handle everyday questions about pay, time off, expenses, or team changes. That kind of back-and-forth slows people down and pushes more work onto HR and finance teams.

Sana from Workday, Workday's agentic AI platform, connects an organization's people and money data, context, policies, and processes in Workday and puts them to work. It powers AI agents that complete tasks, improve processes, and keep humans in the loop. With the Self-Service Agent now in Microsoft 365 Copilot, employees can tap into that intelligence to take action on a wide range of everyday needs directly from Microsoft 365.

Employees already working in Microsoft 365 can, for example, ask how much vacation they have left and then request time off, check the status of an expense, see what they need to do for an upcoming review, or look up company policies such as family leave, all in natural language. When a request involves Workday data or processes, Microsoft 365 Copilot securely connects to the Self-Service Agent, which completes the task in Workday using the organization's existing approvals, policies, and business rules, then returns the results in Copilot.

"People shouldn't have to jump between systems just to get a simple HR or finance answer," said Joel Hellermark, Sana general manager, Workday. "With our Self-Service Agent in Microsoft 365 Copilot, Workday quietly does the hard work in the background, so answers simply appear where people already are."

Complete Everyday HR and Finance Tasks in Seconds

With Self-Service Agent in Microsoft 365 Copilot, every employee and manager can manage everyday HR and finance needs in seconds. For example:

- Employees can check time-off balances, update personal information, view payslips, review tax withholding information, or request leave.
- Managers can review team goals, approve timesheets in bulk, start a performance review for an employee, or submit payroll input.
- Finance leaders or users can ask about expense and travel policies, check eligibility for items like corporate cards, and be guided to create the appropriate request or case when action is needed.

For organizations already using Microsoft 365 Copilot, turning on the Self-Service Agent is a simple configuration step, not a new project the team has to staff. The Self-Service Agent is available as a single app in the Microsoft Marketplace. There's no separate login, no new deployment, and no additional licensing requirement.

"Microsoft 365 Copilot is designed to help people stay in the flow of work while getting more done with less friction," said Srini Raghavan, Corporate Vice President, Microsoft 365 Ecosystem at Microsoft. "With Workday's Sana Self-Service Agent integrated into Microsoft 365 Copilot, employees can access HR and finance support in the tools they use every day, while organizations retain the same policies, controls, and governance they already rely on with Workday."

Grounding Every AI Interaction in Workday's Security, Policies, and Guardrails

Workday operates at the heart of HR and Finance, where trust, accuracy, and auditability are non-negotiable. Its underlying business processes are deterministic by design, with clear starts and finishes, approvals, and controls that deliver consistent, auditable outcomes, while modern AI is probabilistic, reasoning and recommending based on patterns and likelihoods. By tightly coupling Sana's agentic intelligence with Workday's deterministic rails, Workday safely powers the agentic future of HR and Finance: AI agents that automate more of the work, while organizations maintain the security, compliance, and governance they depend on.

With the Self-Service Agent in Copilot, every interaction runs through Workday, so customers keep full control over their data, policies, and processes. Responses follow each organization's role-based permissions, and every action respects existing

approvals and business rules. Organizations also get clear visibility into how the agent is being used, so they can monitor adoption and confirm it's working as intended. While user interactions with the Self-Service Agent appear as activity history in Copilot, the underlying Workday data and transactions stay within the Workday trusted system.

Workday is increasingly focused on interoperable agent-to-agent solutions that drive adoption of AI assistants across ecosystems. Sana from Workday provides the reasoning and guardrails that let these agents work together across platforms, so organizations can coordinate work between assistants while maintaining control over how their data is used.

"Direct Supply is an employee-owned company focused on helping prepare our nation for the needs of an aging population. As we advance that mission, we are building a modern, AI-enabled workplace that helps our Partners and leaders operate with greater agility, clarity, and impact," said Sarah Rolfs, SVP, HR & Transformation, Direct Supply. "Our partnership with Workday is an important part of our broader AI-first strategy, helping bring key actions and insights into the flow of work - enabling faster decisions, stronger organizational outcomes, and greater value for the customers and communities we serve."

Availability

Sana Self-Service Agent in Microsoft 365 Copilot is generally available today for eligible Workday and Microsoft customers.

For more information

Learn more about how Workday built Sana Self-Service Agent in Microsoft 365 Copilothere.

About Workday

Workday is the enterprise AI platform for managingpeople, money, and agents. Workday unifies HR and Finance on one intelligent platform with AI at the core to empower people at every level with the clarity, confidence, and insights they need to adapt quickly, make better decisions, and deliver outcomes that matter. Workday is used by more than 11,500 organizations around the world and across industries – from medium-sized businesses to more than 65% of the Fortune 500. For more information about Workday, visit workday.com.

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Forward-Looking Statements

This press release contains forward-looking statements including, among other things, statements regarding Workday's plans, beliefs, and expectations. These forward-looking statements are based only on currently available information and our current beliefs, expectations, and assumptions. Because forward-looking statements relate to the future, they are subject to inherent risks, uncertainties, assumptions, and changes in circumstances that are difficult to predict and many of which are outside of our control. If the risks materialize, assumptions prove incorrect, or we experience unexpected changes in circumstances, actual results could differ materially from the results implied by these forward-looking statements, and therefore you should not rely on any forward-looking statements. Risks include, but are not limited to, risks described in our filings with the Securities and Exchange Commission ("SEC"), including our most recent report on Form 10-Q or Form 10-K and other reports that we have filed and will file with the SEC from time to time, which could cause actual results to vary from expectations. Workday assumes no obligation to, and does not currently intend to, update any such forward-looking statements after the date of this release, except as required by law.

Any unreleased services, features, or functions referenced in this document, our website, or other press releases or public statements that are not currently available are subject to change at Workday's discretion and may not be delivered as planned or at all. Customers who purchase Workday services should make their purchase decisions based upon services, features, and functions that are currently available.

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