HR ACUITY

Workday Integration

workday

Introduction

The Workday integration allows you to pull employee data into HR. This integration lets HR Acuity collect the most recent data for your employees at pre-defined times. The data is used to update employee data within HR Acuity.

How Does it Work?

- Your Workday administrators create reports in Workday to be picked up by HR Acuity for processing at scheduled times.
- Workday administrators provide the URLs of the created reports to their HR Acuity implementation manager.
- HR Acuity uses the report data to create a CSV file. The CSV file is placed on an internal HR Acuity SFTP server.
- The HR Acuity utility that processes employee, group, and location data each night will load or update the data.

Advantages of the Workday Integration

Using the Workday integration provides several advantages:

- You do not need to map data into our templates or load the data onto the SFTP themselves.
- You control the data you want to send to HR Acuity.
- You can pick and choose exactly what data you want to share with HR Acuity:
  - Configure specific columns within a dataset to share with HR Acuity from an interface in Workday.
  - Decide when you do not want to share data with HR Acuity, disable report authentication, and authorization credentials on your side.
  - A Workday administrator with configuration permissions can set up everything directly in Workday's configuration screens.

- Direct setup removes the lengthy wait time for your IT or Workday teams to develop a solution that creates, configures, and transmits the files to HR Acuity.
- Reduced wait times lead to faster implementations.

How to Set Up Workday

The setup can be split into two main components:

- Creating and configuring the authentication method
    - Integration System User (ISU) or OAUTH credentials
- Creating and configuring the three reports (Employee, Group, Location)

Setup can be performed by a non-technical person. They need permission to administer security groups and reporting in Workday. In most scenarios, we expect IT to be involved in this process.

1 Part One: Creating and Configuring the Authentication Method

Create/Configure Workday Integration System User (ISU)

Workday recommends setting up a new user for third-party integrations rather than using a specific employee. This user profile should be leveraged only for HR Acuity. Other third-party integrations would have their own ISU.

The benefits include:

- The integration is not dependent on an employee who might leave or their permissions are changed.
- All actions by the ISU are logged to troubleshoot errors with the integration and can be reviewed in Workday.

The ISU must have all the necessary permissions to provide employee, group, and location data to HR Acuity.

To create Integration System Users and Security Groups, you must have permission in Workday. If you do not, please contact your internal tech team that manages Workday or your Workday Account Manager.

Create the Integration System User

1. Search for **Create integration system user** and select the task
2. Create a username (eg. HRAcuity_YourCompanyName)
3. Create a strong password
4. Leave **Session Timeout** at 0
   - Setting a value here could result in the integration timing out and data not being processed.
5. Select **Do Not Allow UI Sessions**
   - This setting means users cannot log into Workday and only pull reports via API.
6. Click **Done**
7. Save the username and password in a safe place. You will need to share these securely with the HR Acuity team

Password Expiration

By default, Workday user passwords expire. The length of time before expiration can be configured by the customer.

To prevent errors with the HR Acuity integration due to expired passwords, we recommend removing password expiration for the Integration System User.

1. Search for and select the **Maintain Password Rules** task.
2. Add the Integration System User to the **System Users exempt from password expiration** list

Create Security Group

1. Search for **Create Security Group** and select the task
2. For Type of Tenanted Security Group, select **Integration System Security Group (Unconstrained)**
3. Create a name for the group (ie. HRAcuity_Integration)
4. In the Integration System Users field, add the Integration System User you created.
5. Click **OK / Done**

Assign Group to Domain Security

You will need to perform these steps for each domain required.

1. Search for and select **Domain Security Configuration**
2. Search for the desired domain in the Domain field
   - Select the domain in the results shown and click OK
3. Click the **(...)** option next to the domain name
   - Under **Actions,** select **Domain,** then **Edit Security Policy Permissions**
4. Under **Integrated Permissions,** add the security group previously created
   - Check **Get permission** on the right
5. Click **OK / Done**

An alert to Activate Pending Security Policy Changes may be displayed. We recommend activating the changes after all the domains are set up. Click Yes on this alert **AFTER** all Domain permissions have been added.

2 Part Two: Creating the Reports

To create the necessary reports, you must have permission in Workday. If you do not, please contact your internal tech team that manages Workday or your Workday Account Manager.

You will need to create three reports in Workday:

1. Location
2. Group
3. Employee

How to Create a Custom Report

1. Search for and select the **Create Custom Report** task
1. Fill out the form:
   - Report Name (eg. HRAcuity_CompanyName_Location)
   - Select **Advanced** for Report Type
   - Select the appropriate **Data Source**
   - The data source depends on how your Workday instance is configured. The most common configuration would be **All Active Employees**
   - Check **Enable as a Web Service**
   - Click **OK**
2. Select **Edit Custom Report**
3. Select the **Columns** tab
4. Configure the columns per HR Acuity requirements
   - Set the **Business Object,** which is likely Worker or Employee
   - Select the columns you need from the Workday reporting based on requirements from HR Acuity
   - Enter **Column Name Overrides** if needed. This setting allows for column names on the API output to match the column names in HR Acuity
5. Select the **Share** tab
   - Choose **Share with all Authorized Users** to share the report with the ISU you created
6. Retrieve the report URL
   - Click on the **(...)** option next to the report name
   - Under **Actions,** select **Web Service** then **View URLs**
   - Copy the URL to share with your HR Acuity Implementation Team

URL and File Format

HR Acuity requires CSV files from Workday for processing. You must ensure your report URLs end with **format=csv**

Creating All Reports

Repeat the How to Create a Custom Report steps for each of the three reports.

- Employee:
  - This report may be the easiest to configure.
- Group:
  - This is likely called **Supervisory Organization** in Workday. You may also see **Business Unit** or **Department.**
- Location:
  - Per Workday, you may want to use the standard location format we support (Location ID, Location Name, Location ID, Location Name).
  - Others may want to use the new format (Location ID, Location Name, Parent Location ID).

The format depends on how a customer is configured. You will likely need to select different columns, data sources, and objects. This factor depends on how Workday is configured.

Configuration in HR Acuity for Client

- Securely provide HR Acuity with the following:
  - Integration System User
  - Username for Integration System User
  - Password for Integration System User
  - URLs for all 3 reports created
- OAUTH
  - Token Endpoint
  - Client ID
  - Client Secret
  - Refresh Token
  - URLs for all 3 reports created
- The HR Acuity Implementation Team can help you share the data securely.
- The team will review the files and provide feedback should any changes need to be made.