

**WORKDAY SETUP GUIDE**

**The Below requirements are needed to establish a connection workday.**

**Prerequisites**

Prerequisiteslink  
To connect Workday to Fivetran, you need:  
  
An active Workday report URL  
The username and password to access that Workday report URL  
To configure the reports as Advanced type reports to enable web service access

**Setup Guide**

* NOTE: You must add a separate Workday connector in your Fivetran dashboard for each report. Each Workday connector will sync its report data to its own table in your destination.

1. Create a new user

* Log in to your Workday account.
* Create a new Integration System User to download reports. Fivetran uses the Integration System User to access Custom Reports.

1. Create security group

* In the Create Security Group window, set the Type of Tenanted Security Group to Integration System Security Group (Unconstrained).
* Enter a Security Group Name and click OK.
* In the Edit Integration System Security Group (Unconstrained) window, add the integration system user you created in Step 1 in the Integration System Users field.
* Click OK.

1. Add domain security policies

* Go to Security Group Settings > Maintain Domain Permissions for Security Group.
* In the Integration Permissions window, permit the domain security policies to have Get access. For example, you must permit the following for the Workers business object:
* Person Data: Work Contact Information
* Workday Accounts
* Worker Data: Active and Terminated Workers
* Worker Data: All Positions
* Worker Data: Business Title on Worker Profile
* Worker Data: Current Staffing Information
* Worker Data: Public Worker Reports
* Worker Data: Workers

1. Activate policies

* Go to the Activate Pending Security Policy Changes page and click OK.
* Click Confirm to activate.

1. Create custom report

* On the Create Custom Report page, enter the Report Name.
* In the Report Type drop-down menu, select Advanced.
* Select the Enable as Web Service option.
* Add Data Source. Add the fields you want to sync.
* NOTE: You can create one or more custom reports.

1. Add authorized user to report

* In the custom report's Share tab, add the user you created in Step 1 in the Authorized Users field.

1. Finish custom report configuration

* In each custom report's Advanced tab, share each report to Report-as-a-WebService.
* For each report, go to Actions --> Web Service --> View URLs. Make a note of the REST URL. You will need it to fill in your Fivetran connector setup form.
* Test each report by pasting it into a new browser session, and log in using the Fivetran ELT web service user. If the Report XML does not display, check your user security settings.
* Select the primary key(s). To track history of the report data, make a timestamp column part of the composite primary key.

1. Finish Fivetran configuration

* In your connector setup form, enter the Destination schema name of your choice.
* Enter the Destination table name of your choice.
* Enter the Username and Password for the Fivetran ELT user you created in Step 1.
* Enter the Report URL you found in Step 7.
* Click Save & Test. Fivetran will take it from here and sync your data from your Workday account.

