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INTEGRATION CORE

Supplemental Guide

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SUPPLEMENTAL ACTIVITY 1 - CALCULATED FIELDS

Scenario: Logan McNeil must create three new Calculated Fields using the Worker Business Object. One field will reformat the existing Hire Date. The second field will display a reformatted version of the Rehire Date, but only when Rehire Date is different than the Hire Date value; otherwise the displayed value is blank. The third field displays a Worker's Marital Status, but without the appended Country reference.

Build three Calculated Fields:

1) CF Name: **WICT CF Hire Date**
   Requirement - Reformat the "Hire Date" field using the format YYYY-MM-DD.

2) CF Name: **WICT CF Rehire Date**
   Requirement - This field shows the most recent "Hire Date" for a rehired Worker. However, this new CF will only display a date if the Worker was previously terminated and then rehired. If not, the field should display a blank date. When a Worker is a rehire, display this CF using the YYYY-MM-DD format.

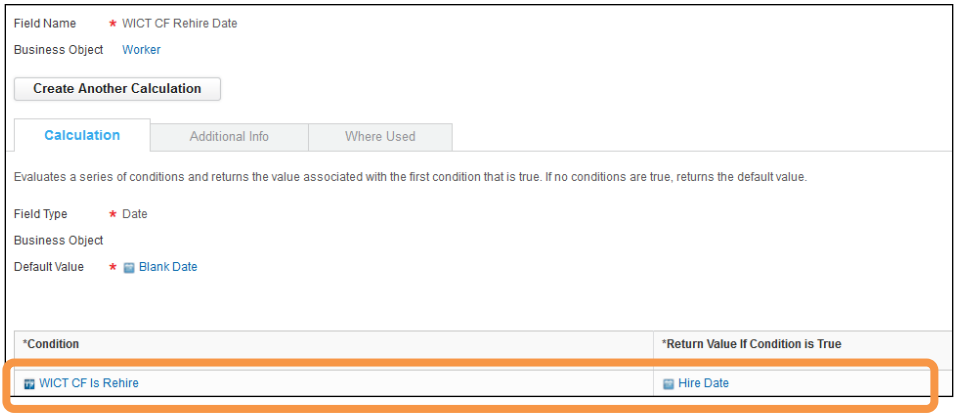
   To determine a rehire in this case, compare dates in two fields. If "Hire Date" is not the same as "Original Hire Date", display "Hire Date" reformatted as **WICT CF Rehire Date**. Otherwise (if "Hire Date" is the same as "Original Hire Date"), the **WICT CF Rehire Date** field should display a blank date.

3) CF Name: **WICT CF Marital Status**
   Requirement – Display "Martial Status" with the appended Country reference removed.
   e.g. "Married (Canada)" will be displayed as "Married"

Test the three new fields on any custom report you wish.

HINTS:

- When you find yourself using the word "If" to describe a Calculated Field, as you may for **WICT CF Rehire Date**, you most likely need to use an Evaluate Expression CF. Recall from the pyramid that an Evaluate Expression CF needs a "Condition". The condition needs to be a T/F field.
- To meet the requirement of leaving the Rehire Date CF 'blank' for Workers who are not Rehires, you can use an existing Global field called "Blank Date".
- This picture shows one of the CFs used in the Eval Calc function:



Test these new fields in the **WICT CF Employee Details Report.** Add "**WICT CF Hire Date**", "**WICT CF Rehire Date**" and **"WICT CF Marital Status"** to test. **Evelyn Welch** should have a non-blank rehire date. The new date CFs should have the appropriate format and the **WICT CF Marital Status** field should not include a country reference.

(End of Activity)

SUPPLEMENTAL ACTIVITY 2 – LOOKUP RELATED VALUE

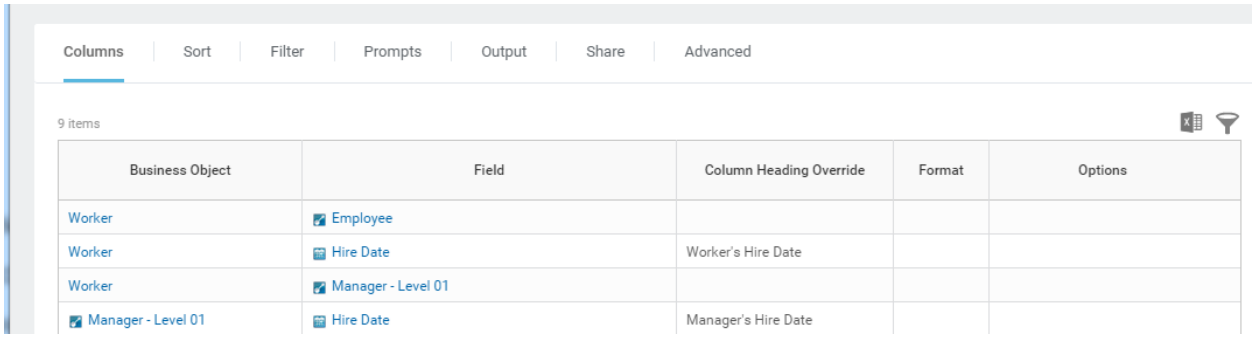
Scenario: Logan McNeil has been asked to modify the WICT CF Employee Details Report. She has been asked to include a field that shows the number of months' difference between the employee's hire date and the hire date of that employee's manager.

While logged-In as Logan McNeil *(lmcneil)*

TASK 1 - EDIT REPORT - ADD MANAGER AND HIRE DATE FIELDS

- Edit the **WICT CF Employee Details Report** and add the following fields.

Business Object	***Field***
Worker	Manager – Level 01
Manager – Level 01	Hire Date



- See how you can access the manager's hire date by going to the RBO: Manager Level 01 in your report.
- Click OK to save and run the report.
- Filter the report output on the Manager's Hire Date to find examples where the Worker's Hire Date does not equal the Manager's Hire date.

Employee	Worker's Hire Date	Manager - Level 01	Manager's Hire Date	Supervisory Organization	Management Level	Length of Service	Total Base Pay Annualized - Amount	Last Base Pay Increase - Date
Daljit Singh	01/01/2000	Edward Huntington	03/01/2010	Global Support - UK & Ireland Group	8 Individual Contributor	15 year(s), 9 month(s), 10 day(s)	£32,774.04	04/01/2015
Emma Hobson	01/01/2000	Edward Huntington	03/01/2010	Global Support - UK & Ireland Group	8 Individual Contributor	15 year(s), 9 month(s), 10 day(s)	£33,284.79	04/01/2015
Phoebe Tyler	01/01/2000	Edward Huntington	03/01/2010	Global Support - UK & Ireland Group	8 Individual Contributor	15 year(s), 9 month(s), 10 day(s)	£26,225.45	04/01/2015

TASK 2 - CREATE CALCULATED FIELDS

- Now, let's create needed calculated fields to determine the date difference between the Manager's Hire date and the Worker's Hire date.
- Search and run the **Create Calculated Field** task.
- Define the field as follows:

Field Name	***Entry Value***
Field Name	WICT CF Managers Hire Date
Business Object	Worker
Function	Lookup Related Value

- Click the **OK** button.
- Set the Lookup Field to **Manager – Level 01**.
- Set the Return Value to **Hire Date**.
- Configure the **Additional Info** tab appropriately.
- Click **OK** to save.
- Click on the **Create Another Calculation** button.

Define the field as follows:

Field Name	***Entry Value***
Field Name	WICT CF Hire Date Difference from Manager
Business Object	Worker
Function	Date Difference

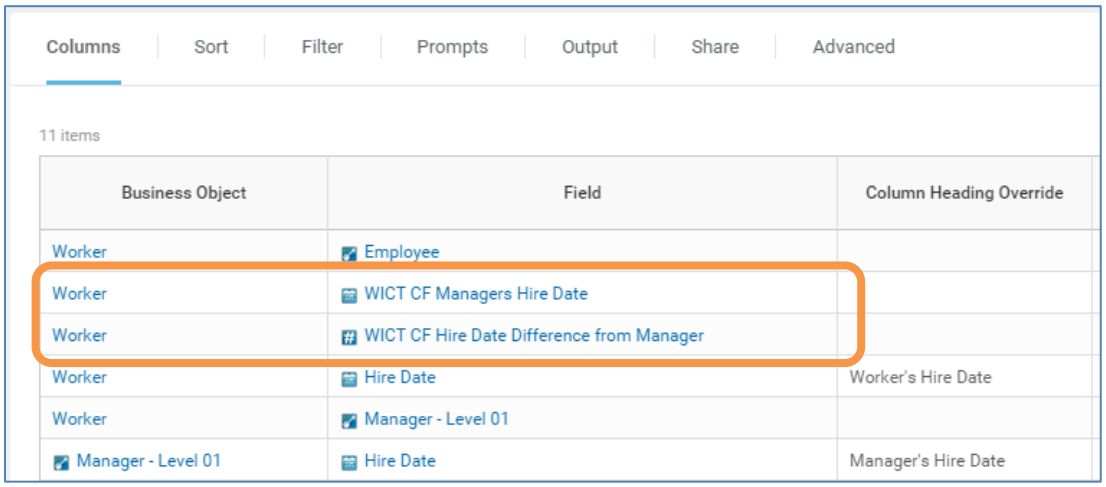
- Set the Start Date Field to **Hire Date**.
- Set the End Date Field to **WICT CF Managers Hire Date**.
- Select the Value Returned radio button for **In Months**.
- Check the **Return Zero on Error** checkbox.
- Configure the **Additional Info** tab appropriately.

- Click **OK** to save and **Done.**

TASK 3 - EDIT REPORT AND ADD NEW CALCULATED FIELDS

- Edit the **WICT CF Employee Report** and add the calculated fields:

Business Object	***Field***
Worker	WICT CF Managers Hire Date
Worker	WICT CF Hire Date Difference From Manager



- Click OK to save and run the report, then review the results.

Employee	WICT CF Managers Hire Date	WICT CF Hire Date Difference from Manager	Worker's Hire Date	Manager - Level 01	Manager's Hire Date
Amit Patel	10/01/2014	177	01/01/2000	Jamie Stone	10/01/2014
Antonio Conti	10/01/2014	177	01/01/2000	Jamie Stone	10/01/2014
Björn Eklund	03/15/2010	122	01/01/2000	Anders Wahlström	03/15/2010
Brian Sullivan	03/24/2014	170	01/01/2000	Deborah Simpson	03/24/2014
Carol Li	10/01/2014	177	01/01/2000	Jamie Stone	10/01/2014

(End of Activity)

SUPPLEMENTAL ACTIVITY 3 – EXTRACT SINGLE INSTANCE

Scenario: Logan McNeil has been asked to create a calculated field for a Worker's oldest child dependent. If a Worker does not have a child listed as a Dependent, the field should be empty. Once the field is created, add it to the WICT CF Employee Dependents report.

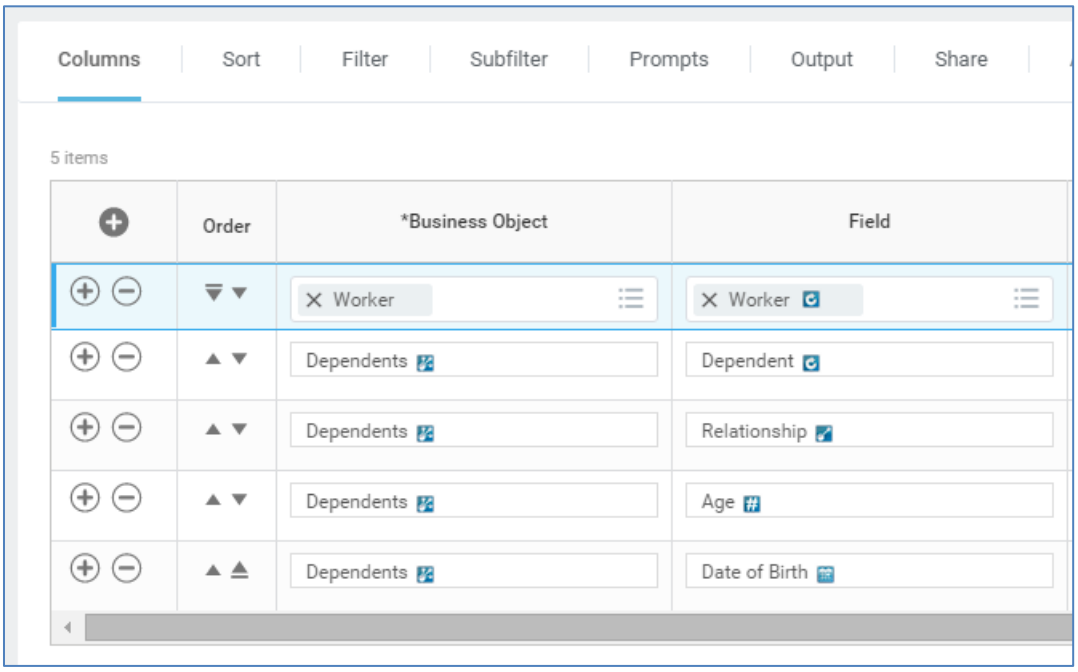
TASK 1 – CREATE CUSTOM REPORT

1. Search and run the **Create Custom Report** task.

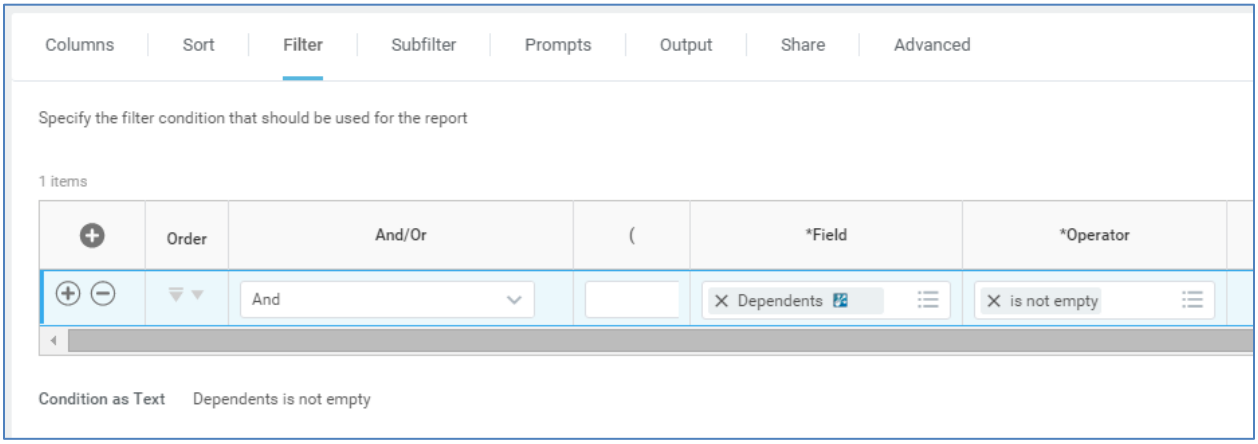
Field Name	*Entry Value*
Report Name	WICT CF Employee Dependents
Report Type	Advanced Report
Data Source	All Workers

2. Click the **OK** and add the following fields by clicking on the add row icon as defined below:

Business Object	*Field*
Worker	Worker
Dependents	Dependent
Dependents	Relationship
Dependents	Age
Dependents	Date of Birth



3. Select the **Filter** tab and remove workers who do not have any dependents (*Dependents is not empty*)



4. Click **OK** and **Done** to save these changes, then **Run** the report.

TASK 2 – CREATE CALCULATED FIELD

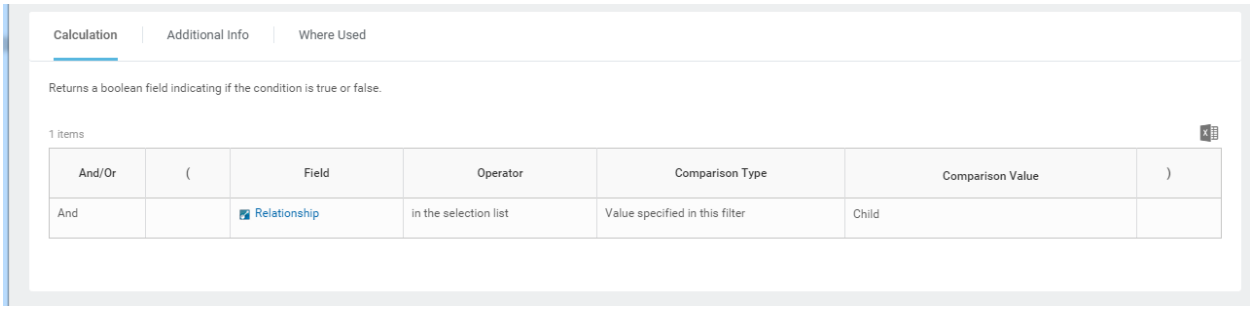
1. Search for and run the **Create Calculated Field** task.
2. Define the field as follows:

Field Name	*Entry Value*

Field Name	WICT CF Dependent is Child T/F
Business Object	Dependent
Function	True/False Condition

3. The true/false expression should be defined as follows:

Field Name	*Entry Value*
Field	Relationship
Operator	Frequently Used > in the selection list
Comparison Type	Value Specified in this Filter
Comparison Value	Child

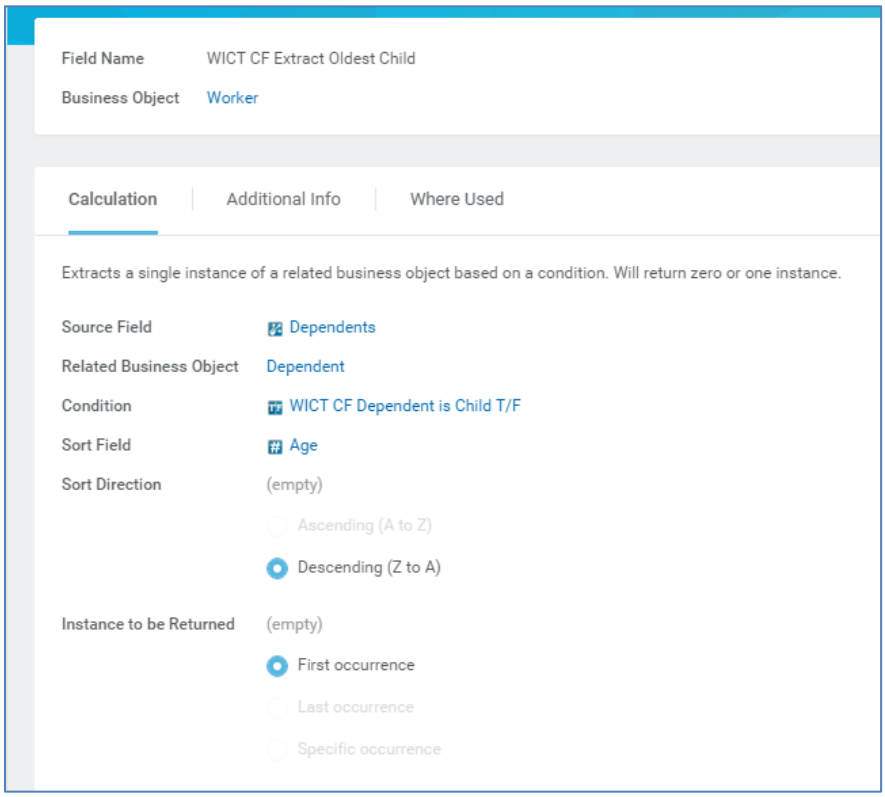


4. Click **OK**.
5. Click on the **Create Another Calculation** button.
6. Define the field as follows:

Field Name	*Entry Value*
Field Name	WICT CF Extract Oldest Child
Business Object	Worker
Function	Extract Single Instance

7. Click OK and configure the Extract Single Instance calculation as follows:

Field Name	*Entry Value*
Source Field	Dependents
Condition	WICT CF Dependent is Child T/F
Sort Field	Age
Sort Direction	Descending (Z to A)
Instance to be returned	First Occurrence



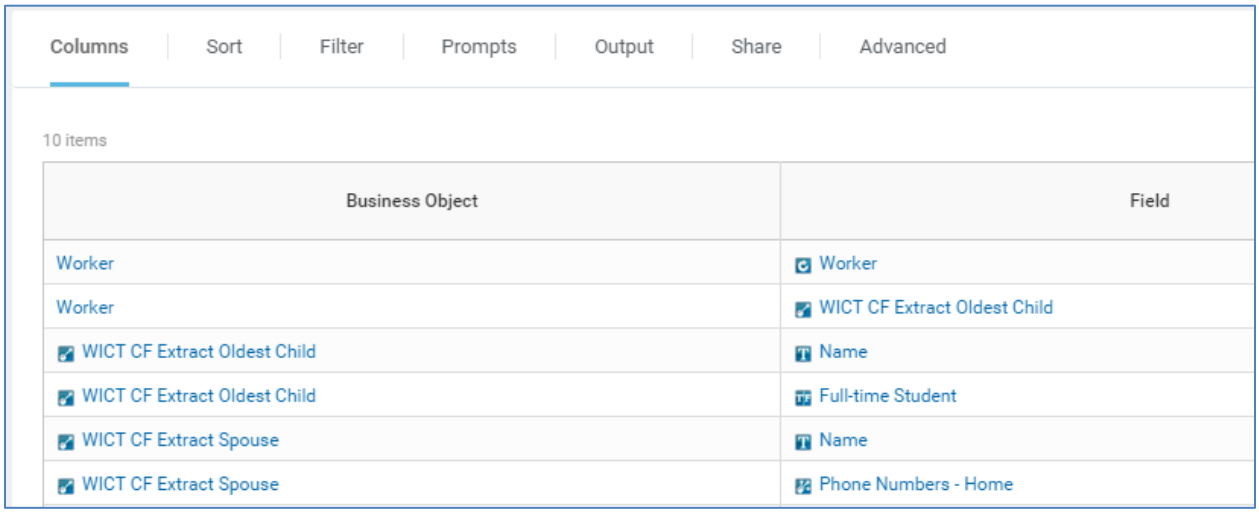
8. Click **OK** to save and **Done**.
9. Add the **WICT CF Extract Oldest Child** to the *WICT CF Employee Dependents* report.
10. Save and run the report.

Worker	WICT CF Extract Oldest Child	Dependents			
		Dependent	Relationship	Age	Date of Birth
Alain DuBois	Nathalie DuBois	Nathalie DuBois	Child	6	09/04/2009
		Vivienne Peroux	Spouse	34	11/07/1980
Alex Grossman		Cynthia Grossman	Spouse	44	03/30/1971
Allison Hunter		Michael Hunter	Spouse	57	08/13/1958
Alvin Hwang		Edward Boric	Domestic Partner	43	04/22/1972
Amanda Baker	Tyler Baker	Tyler Baker	Child	14	04/15/2001
Amanda Mackenzie		William Mackenzie	Spouse	47	04/19/1968

Challenge (optional):

- Having extracted the oldest Child, extract the worker's spouse and add it to the report
- Your **WICT CF Extract Oldest Child** calculated field is now a single instance field that you have derived from an existing multi-instance relationship. By now having

this single instance calculated field, you can use your calculated field like any RBO in your report to access fields for your instance. See example below.



(End of Activity)

SUPPLEMENTAL ACTIVITY 4 – EXTRACT MULTI-INSTANCE

Scenario: Logan McNeil has been asked to create a calculated field for a Worker's children and add it to the **WICT CF Employee Dependents** report. If a Worker does not have children listed as Dependents, the field should be empty. Otherwise, the field should contain a list of all the Children (a 1:M Related Business Object).

- Search for the string *Create Calc field*.
- Select the Create Calculated Field task.
- Define the field as follows:

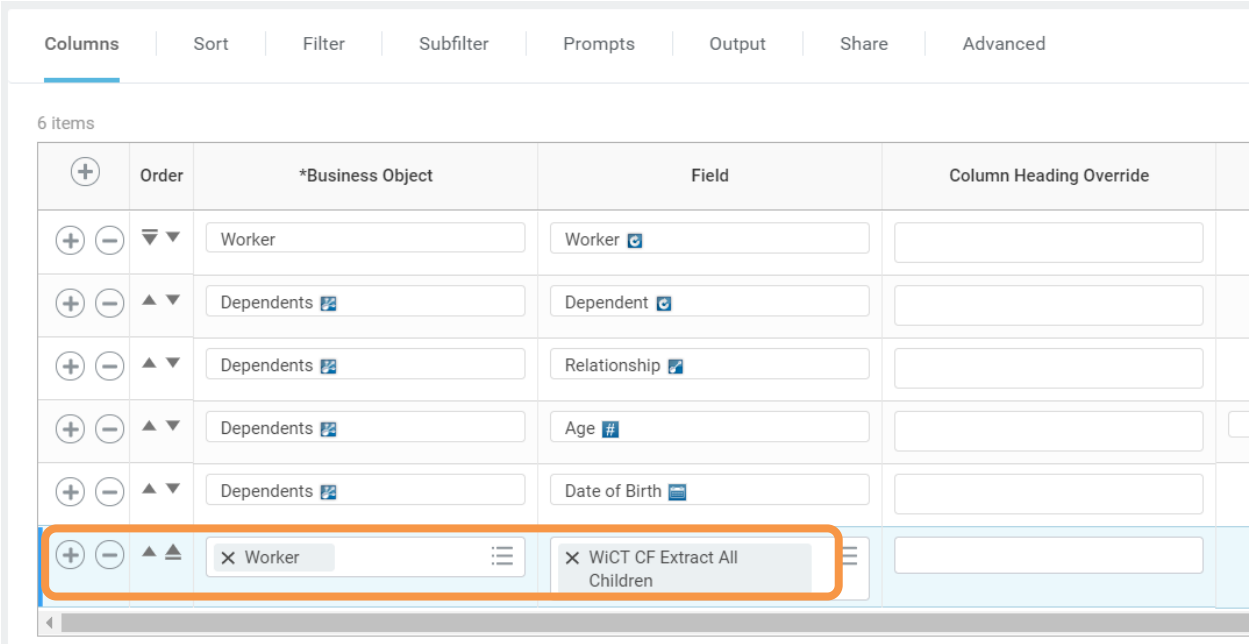
Field Name	***Entry Value***
Field Name	WICT CF Extract All Children
Business Object	Worker
Function	Extract Multi-Instance

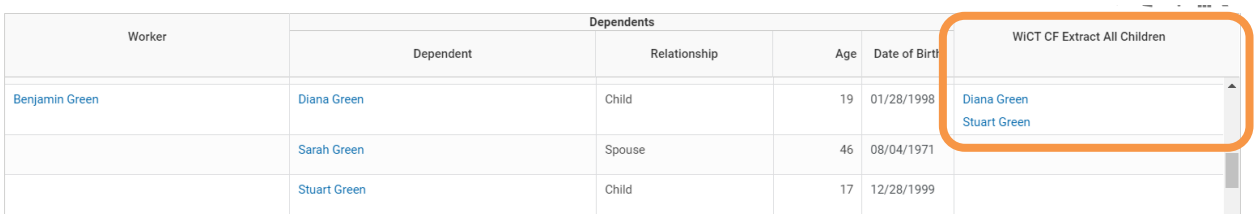
- Define the field as follows:

Field Name	***Entry Value***
Operation Type	Subset
Source Field	Dependents
Condition	WICT CF Dependent is Child T/F (created in last activity)

- Click **OK** and **Done**.
- Add the WICT CF Extract All Children to the WICT CF Employee Dependents report.
- Save and run the report.

Your **WICT CF Extract All Children** calculated field is now an object type multi-instance field that you have derived from an existing multi-instance relationship. By now having this multi instance calculated field, you can use your calculated field like any RBO in your report to access fields for your instances. See example below.





Note: Use subfilters where possible instead of calculated fields. Depending on our requirement, here we could have used a subfilter in the report definition to only see worker's dependents who are children.

(End of Activity)

SUPPLEMENTAL ACTIVITY 5 - CORE CONNECTOR

Scenario: You have been tasked by the Human Resources department to create an integration system that will pick up changes in a worker's business title for workers who have a management level of manager or above. This file will be used to notify the procurement department that new business cards will need to be ordered.

Configure the integration system with the following high level requirements:

- Core Connector Worker (CCW) will be configured to generate the required output file.
- Configure the Integration Field Override Eligibility to use a calculated field that returns true for workers with a Management Level of Manager or above. This calculated field will need to be created.
- The following fields (as well as their prior values) should be contained in the output:
  - **First Name**
  - **Last Name**
  - **Business Title**
  - **Gender** - Map the Workday Value to the third party system value. See below.
    - *Hint*: Use the Related Actions item "Configure Integration Maps" under "Integration System"

Workday Internal Value	External Value
Male	M
Female	F
Not Declared	Other

  - **Compensation Level** - Configure a custom integration service to output an Integration Field Override with the value of the previously created "*WICT CF Eval Comp Level"* calculated field.
- Trigger notifications to the Integration Administrator when the "Failed" or "Completed with Errors"
  - **Subject**: "Integration Failed or Completed with Errors"
  - **Body**: "This integration failed or completed with errors. Please follow-up."
- Configure Sequence generator so the output file follows the pattern described on the following page.
- Since this application is still in a test phase, the output does not yet need to be sent outside Workday
- Run the application, setting the:
  - **As Of Entry Moment** to the default date and time.
  - **Effective Date** to default date and time.
  - **Last Successful As Of Entry Moment** to two days prior to today at 12:00:00 AM.
  - **Last Successful Effective Date** to two days prior to today.
- After configuring the integration system and testing with the specified data, make the following additional configuration test:

- Add the Worker Transaction Log Service. While not required, you could optionally configure a specific Transaction Type subscription:
  - Transaction Types: Title Change – Business Title Change Event

- Re-run the application using the same date parameters as described in the previous run step
- How has the output data changed, if at all? Are there any differences in the two test runs?

Setting	Value
Integration System Core Connector Worker	WICT_HCM_Business_Title_Change
File Output Format	Default XML File
Core Connector – Worker Output File Name	WICT_HCM_Business_Title_Change-MonthInYear.DayOfMonth.Year-Seq.xml Where: • MonthInYear – Two Digit Month e.g. 01, 12 • DayOfMonth – Two Digit Day of month e.g. 01, 29 • Year – Four Digit Year e.g. 2017, 2018 • Seq - Sequence Number starting beginning from 1
Integration Attributes	Version 25.0 for the CCW Output Format Include Prior Values is enabled to display current and prior Business Titles
Test Scenarios	• Logan McNeil – Change Business Title to Chief HR Officer, effective as of the current date. • Pedro Santiago – Change Business Title to Workforce Planning Director, effective as of the current date + 1. • Henry Lynch – Change Business Title to Payroll Operations Director, effective as of the current date -1. • Norman Chan – Change Business Title to Senior Staff Payroll Specialist, effective as of the current date -1.

(End of Activity)

SUPPLEMENTAL ACTIVITY 6 - Change Detection Part 1

Business Case: Core Connector Worker can generate an output file that only shows data which changed within a selected time frame.

To demonstrate the concept of capturing "Current Dated Data", we'll create a new CCW integration to select workers whose hiring was newly effective.

We'll hire four workers will be hired and run the integration to observe its behavior.

From the output file generated, students will be able to understand how Change Detection is performed by looking at the hires included and excluded.

The main steps are:

- Create the Integration System using the Worker Core Connector template.
- Configure Integration Attributes to define how this Integration System will behave.
- Select the Data Fields to include in the output file coming out of the Worker Core Connector Integration System.
- Hire workers with different effective dates
- Run the integration to see how those effective dates interact with the date criteria selected

TASK #1: CREATE INTEGRATION SYSTEM

While logged-In as Logan McNeil *(lmcneil)*

1. Search "create int sys" and select the link **Create Integration System**.
2. Enter a System Name of:

   WICT-HCM-Sync

3. From the **New using Template** radio button, select the sequence "By Integration Template Category" >Cloud Connect for HCM > Core Connector: Worker
4. Click **OK**
5. On the Configure Integration Services page, select the **Enabled** checkbox for the following **Integration Services**:

   a. Core Connector: Worker/Core Connector: Worker Transaction Log Service
   b. Core Connector: Worker/Worker Personal Data Section Fields
   c. Core Connector: Worker/Worker Status Data Section Fields

6. Click "OK".

7. This opens *View Integration System* page. Notice the red error on top of of the page indicating that there is an Integration Attribute marked as **"Required for Launch"** that has no value assigned.

8. From the integration system's **Related Actions** icon, select the sequence:

   Integration System > Configure Integration Attributes

9. Under "Integration Attributes" enter the following information:

Field Name	**Entry Value**
"Output Filename"	WICT_HCM_Sync_Output.xml
"Version"	25.0

10. Click "OK" to return to the "View Integration System" page for the WICT-HCM-Sync integration.

11. Next, set the Eligibility Criterion. Select the sequence:

    a. Integration System -> Configure Integration Field Overrides.

    b. Configure the Eligibility criterion by setting the Override External Field to

       Is True (a Workday Delivered Boolean, T/F field)

12. Click "OK" at the bottom of the panel, to save this configuration.

13. Return to the "View Integration System" page for the WICT-HCM-Sync integration and select the "Related Action" icon.

14. Select "Integration System" -> "Configure Integration Field Attributes".

15. In the "Worker Personal Data Section Fields", select Include in Output for the following fields:

    a. Name Data / First Name

    b. Name Data / Last Name

16. In the "Worker Status Data Section Fields" section, select "Include in Output" for the item named "Active".

17. Click "Ok" and then "Done" to complete the CCW configuration.

TASK #2: HIRE WORKERS

Hire Process Overview

Login as Jack Taylor (jtaylor), a manager, to perform the following actions. The password is the same as that for lmcneil.

- Initiate and complete 4 hires, one effective in the past, one effective today, one effective tomorrow and one effective the day after tomorrow.

- Create the compensation package for each hire

Search and hire **Dion Jackson**, effective tomorrow

1. Click on the Related Action off of Dion Jackson's name. Select Hire > Hire Employee

Field Name	*Entry Value*
Supervisory Organization	IT HelpDesk Department (search for **IT Help**)
Existing Pre-Hire	Dion Jackson

2. Click the **OK** button.

3. Complete the hire information (leaving the Work Space field empty):

Field Name	*Entry Value*
Hire Date	tomorrow
Reason	Select reason **New Position - Fill Vacancy**
Position	IT HelpDesk Specialist
Employee Type	Regular (selected as default value)
Job Profile	IT HelpDesk Specialist (selected as default value)
Time Type	Full time (selected as default value)
Business Site	San Francisco (selected as default value)
Pay Rate Type	Salaried

4. The remaining fields (under Additional Information) are not required, so click the **Submit** button.
5. Click the **Open** button under Next Steps on the confirmation page to Propose Compensation.
6. On the Propose Compensation page, click the "Add" button in the under the green '+' for Salary Plans.
7. Choose **General Salary Plan** from the "All Compensation Plans" category.
8. For **Amount**, enter 65,000.00.
9. Leave the default of **USD** for Currency and **Annual** for Frequency.
10. Click the **Submit** button.
11. Verify the amount of 65,000.00 USD Annual appears under Salary Plans.
12. Click the **Submit** button. Observe the **Process Successfully Completed** "check icon" appears.
13. Click the **Done** button on this "Success! Event submitted" page.
14. Based on the business process defined for the IT HelpDesk Department, the hire is complete.

Search for and hire **Jackie Wilson**, effective today.

1. Click on the Related Action off of **Jackie Wilson's** name. Select Hire > Hire Employee

Field Name	*Entry Value*
Supervisory Organization	IT HelpDesk Department
Existing Pre-Hire	Jackie Wilson

2. Click the **OK** button.

3. Complete the hire information (leaving the Work Space field empty):

Field Name	*Entry Value*
Hire Date	current date
Reason	Select reason **New Position - Fill Vacancy**
Position	IT HelpDesk Specialist
Employee Type	Regular (selected as default value)
Job Profile	IT HelpDesk Specialist (selected as default value)
Time Type	Full time (selected as default value)
Business Site	San Francisco (selected as default value)
Pay Rate Type	Salaried

4. The remaining fields (under Additional Information) are not required, so click the **Submit** button.
5. Click the **Open** button under Next Steps on the confirmation page to Propose Compensation.
6. On the Propose Compensation page, click the "Add" button in the under the green '+' for Salary Plans.
7. Choose **General Salary Plan** from the "All Compensation Plans" category.
8. For **Amount**, enter 65,000.00.
9. Leave the default of **USD** for Currency and **Annual** for Frequency.
10. Click the **Submit** button.
11. Verify the amount of 65,000.00 USD Annual appears under Salary Plans.
12. Click the **Submit** button. Observe the **Process Successfully Completed** "check icon" appears.
13. Click the **Done** button on this "Success! Event submitted" page.
14. Based on the business process defined for the IT HelpDesk Department, the hire is complete.

Search and hire **Andrew Shea**, effective as of a date in the past.

1. Click on the Related Action off of **Andrew Shea's** name. Select Hire > Hire Employee

Field Name	*Entry Value*
Supervisory Organization	IT HelpDesk Department
Existing Pre-Hire	Andrew Shea

2. Click the **OK** button.

3. Complete the hire information (leaving the Work Space field empty):

Field Name	*Entry Value*
Hire Date	08 February 2018
Reason	Select reason **New Position - Fill Vacancy**
Position	Senior IT Analyst
Employee Type	Regular (selected as default value)
Job Profile	Senior IT Analyst (selected as default value)
Time Type	Full time (selected as default value)
Business Site	San Francisco (selected as default value)
Pay Rate Type	Salaried

4. The remaining fields (under Additional Information) are not required, so click the **Submit** button.
5. Click the **Open** button under Next Steps on the confirmation page to Propose Compensation.
6. On the Propose Compensation page, click the "Add" button in the under the green '+' for Salary Plans.
7. Choose **General Salary Plan** from the "All Compensation Plans" category.
8. For **Amount**, enter 65,000.00.
9. Leave the default of **USD** for Currency, and **Annual** for Frequency.
10. Click the **Submit** button.
11. Verify the amount of 65,000.00 USD Annual appears under Salary Plans.
12. Click the **Submit** button. Observe the **Process Successfully Completed** "check icon" appears.
13. Click the **Done** button on this "Success! Event submitted" page.
14. Based on the business process defined for the IT HelpDesk Department, the hire is complete.

Search for and hire **Barry Sikes**, effective two days from today.

1. Click on the Related Action off of **Barry Sikes's** name. Select Hire > Hire Employee

Field Name	*Entry Value*
Supervisory Organization	IT HelpDesk Department
Existing Pre-Hire	Barry Sikes

2. Click the **OK** button.

3. Complete the hire information (leaving the Work Space field empty):

Field Name	*Entry Value*

Hire Date	2 days from today
Reason	Select reason **New Position – Fill Vacancy**
Position	Senior IT Analyst
Employee Type	Regular (selected as default value)
Job Profile	Senior IT Analyst (selected as default value)
Time Type	Full time (selected as default value)
Business Site	San Francisco (selected as default value)
Pay Rate Type	Salaried

4. The remaining fields (under Additional Information) are not required, so click the **Submit** button.
5. Click the **Open** button under Next Steps on the confirmation page to Propose Compensation.
6. On the Propose Compensation page, click the "Add" button in the under the green '+' for Salary Plans.
7. Choose **General Salary Plan** from the "All Compensation Plans" category.
8. For **Amount**, enter 65,000.00.
9. Leave the default of **USD** for Currency, and **Annual** for Frequency.
10. Click the **Submit** button.
11. Verify the amount of 65,000.00 USD Annual appears under Salary Plans.
12. Click the **Submit** button. Observe the **Process Successfully Completed** "check icon" appears.
13. Click the **Done** button on this "Success! Event submitted" page.
14. Based on the business process defined for the IT HelpDesk Department, the hire is complete.

Logout as *jtaylor.*

TASK #3: TEST INTEGRATION PROCESS "WICT-HCM-SYNC"

While logged-In as Logan McNeil *(lmcneil)*

1. Click the Related Action of the WICT-HCM-Sync Integration System.
2. Select **Integration -> Launch / Schedule**.
3. Launch Schedule Integration page is displayed.

Field Name	***Entry Value***
Integration	WICT-HCM-Sync
Run Frequency	Run Now

4. Click the **OK** button.
5. On the "Schedule and Integration" panel provide these parameters:

Field Name	*Entry Value*
As Of Entry Moment	Current Date and Time – **Note this for the next run of this integration**
Effective Date	Today's Date
Last Successful As Of Entry Moment	2 days ago at 12:00:00 am midnight
Last Successful Effective Date	2 days ago
Workers	<Blank>
Full File	Unchecked

6. Click OK. The View Background Process page is displayed. Refresh the page and watch for it to complete.

7. When finished, select the "Output Files" tab and select the "WICT_HCM_Sync_Output.xml" file.

8. From the file contents, identify which newly hired Workers appear in the output file.

Worker	*In Output File?*	*Why?*
DION JACKSON		
JACKIE WILSON		
ANDREW SHEA		
BARRY SIKES		

Why are only these selected for the output file?

(End of Activity)

SUPPLEMENTAL ACTIVITY 7 - Change Detection Part 2, Run The Day Following Part 1

Business Case: This activity simulates a scheduled process running daily. The previous day's process picked up some Employees and ignored others. Running the process with a new Launch Parameter dates should show students who gets picked up and who doesn't.

Run this one day AFTER running the previous Activity, CHANGE DETECTION PART 1

TASK #1 PROCESS WICT-HCM-SYNC TO DETERMINE OUTPUT

While logged-In as Logan McNeil *(lmcneil)*

1. Run this Activity one day after running CHANGE DETECTION PART 1,
2. Launch the process.

Field Name	*Entry Value*
Last Successful Launch Moment	Date and Time of **As Of Moment** field used on the previous day's process. (Saved from Step 5 of Task 11 above)
As Of Moment	Current Date and Time
Workers	<Blank>
Full File	Unchecked

3. Record which newly hired Workers were included in the output file:

Worker	*In Output File?*	*Why?*
DION JACKSON		
JACKIE WILSON		
ANDREW SHEA		
BARRY SIKES		

4. Why do we see these workers in the output file?.

(End of Activity)

SUPPLEMENTAL ACTIVITY 8 - Fields And Transactions With Change Detection

Business Case: Fields and Transactions selected in the CCW Integration System affects what is included in the Change Detection process.

For a data change to be included, three criteria should be met:

1. The data change should be within the date range set as the Process run parameters.
2. The Transaction should occur, and, optionally, set for a specific event.
3. A change should have occurred on the selected Field's data value.
4. Some of these runs may be slower than the previous ones.

While logged-In as Logan McNeil *(lmcneil)*

Lab Setup:

- Search for the integration system **WICT-HCM-Sync.**
- **Clone the Integration and perform this Activity on the clone.**
  - **Rename the clone "WICT-HCM-Sync-Clone"**
  - **This will leave the original integration available for the next Activity.**
- Select **Integration System -> Configure Integration Services**.
- Look for the Service **Worker Status Data Section Fields**.
  - Go to the column marked as Enabled and unselect the checkbox.
- Look for the Service **Worker Transaction Log Service.**
  - Go to the column marked as Enabled and unselect the checkbox
- Click "OK" and "Close".

TASK #1: SELECTING DATA CHANGE FIELD FOR CHANGE DETECTION

1. Run the WICT-HCM-Sync-Clone integration without making any application changes. This will use only data field selections to determine what instances are selected.

Field Name	*Entry Value*
As Of Entry Moment	Current Date and Time
Effective Date	Current Date
Last Successful As Of Entry Moment	Date: 01/01/2011 Time: 12:00:00 am midnight
Last Successful Effective Date	Date: 01/01/2011
Workers	<Blank>
Full File	Unchecked

Is Leigh Hastings included in the output file? Why?

Worker	In Output File?	Why?
LEIGH HASTINGS (21057)		

TASK #2: USING ADDITIONAL DATA CHOICES TO CONTROL CHANGE DETECTION

1. Search "view int sys" and select the link **View Integration System**.
2. Select WICT-HCM-Sync-Clone.
3. Click OK.
4. Select **Integration System -> Configure Integration Services**.
5. Look for the Service **Worker Status Data Section Fields**.
6. Select the check box under the column marked as **Enabled**.
7. Click "OK" and "Close".
8. Click on Related Action of this Integration System.
9. Click on **Integration System -> Configure Integration Field Attributes** link.
10. Notice how there will be multiple sets of Data Sections on the left side of the page.
11. Select the **Worker Status Data Section Fields** section.
12. Look for a Field **Employee Status** and, if not already selected, click on the check box under **Include in Output** column. If any other fields are selected, unselect them.
13. Click "OK" and "Close".
14. Run the WICT-HCM-Sync process as the current user with the following criteria.

Field Name	*Entry Value*
As Of Entry Moment	Current Date and Time
Effective Date	Current Date
Last Successful As Of Entry Moment	Date: 01/01/2011 Time: 12:00:00 am midnight
Last Successful Effective Date	Date: 01/01/2011
Workers	<Blank>
Full File	Unchecked

Is Leigh Hastings included in the output file? Why?

Worker	In Output File?	Why?
LEIGH HASTINGS (21057)		

TASK #3 USING SPECIFIC TRANSACTIONS FOR CHANGE DETECTION, #1

1. Search "view int sys" and select the link **View Integration System**.
2. Select WICT-HCM-Sync-Clone.
3. Click "OK".
4. Select **Integration System -> Configure Integration Services**.
5. Look for the Service **Worker Transaction Log Service** and enable it if it is not enabled.
6. Click on the related **Action** icon of this Integration System.
7. Click on **Integration System -> Configure Integration Transaction Log** link and select the "Override Default Values" option.
8. Select the radio button next to **Subscribe to specific Transaction Types**.
9. Click on the Prompt. Select **Hire – Hire Employee Event** transaction.
10. Click "OK"
11. Run the WICT-HCM-Sync process as the current user with the following criteria.

Field Name	Entry Value
As Of Entry Moment	Current Date and Time
Effective Date	Current Date
Last Successful As Of Entry Moment	Date: 01/01/2011 Time: 12:00:00 am midnight
Last Successful Effective Date	Date: 01/01/2011
Workers	<Blank>
Full File	Unchecked

Is Leigh Hastings included in the output file? Why?

Worker	In Output File?	Why?
LEIGH HASTINGS (21057)		

TASK #4: USING DIFFERENT TRANSACTIONS FOR CHANGE DETECTION

1. Go back to Integration System.
2. Click on Related Action of the WICT-HCM-Sync-Clone Integration System.
3. Click on **Integration System -> Configure Integration Transaction Log** link.
4. Select the radio button next to **Subscribe to specific Transaction Types**.
5. Click on the Prompt. Select **Termination – Terminate Employee Event** transaction.
6. Run this integration system with the following criteria.

Field Name	*Entry Value*
As Of Entry Moment	Current Date and Time
Effective Date	Current Date
Last Successful As Of Entry Moment	Date: 01/01/2011 Time: 12:00:00 am midnight
Last Successful Effective Date	Date: 01/01/2011
Workers	<Blank>
Full File	Unchecked

Is Leigh Hastings included in the output file? Why?

Worker	*In Output File?*	*Why?*
LEIGH HASTINGS (21057)		

Why is Leigh Hastings included in the output from some runs but not others? This happens even though the entry and effective date ranges are the same. What additional criteria contribute to the data selection process?

(End of Activity)

SUPPLEMENTAL ACTIVITY 9 - CREATE AN INTEGRATION SYSTEM USER

Business Case: You will create a new integration system user and integration security group. You will then modify the security group to associate the appropriate domains required by the integration system. Because setting up the correct security is a complex task, in the steps below we will use a simplified trial and error approach.

This iterative approach begins by collecting a baseline snapshot of the data provided using a developer ID.

Since we are using the Core Connector Worker template, the ISU and ISG are created and assigned the access rights needed to use the" Get Workers" web service call (see "Get Workers (Web Service)" under the task "View Security for Securable Item" as well as call to other web services. Also, the ISU needs permission to run the integration and that is provided through the "Integration Event" domain.

Once rights are assigned, activate the changes with the "Activate Pending Security Policy Changes" task.

This likely is not sufficient to collect all the data in the baseline set. Use the "Test Security for Document Field Overrides" task to check this. Optionally, test access by running the Integration. If run, no data is delivered, and the Diagnostic Audit file shows data not eligible to be included in the final output file. This implies the Eligibility Criterion field may not be accessible.

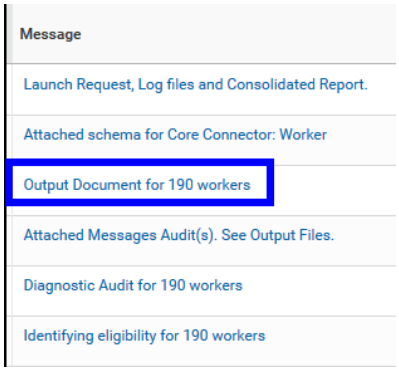
Once this is corrected, some but all data is included in the output. Identify the missing fields. Find the Business Object which holds those fields (using the "Business Object Details" report or by going directly to the business object). Locate the field(s) and open view the security for the field(s). From the Available Actions item on the field's Domain Security Policy, Edit Permissions and add the ISG to the Integrations Permissions set.

When all permissions are updated, run the "Activate Pending Security Policy Changes" task to activate these. Re-run the integration to determine if all the expected data is shown.

1. Before setting up security on the **WICT_HCM_Workers** integration system, we need output from an unrestricted run as a reference. This may already be available from the initial runs of the integration.

2. If needed, obtain this file by launching the **WICT_HCM_Workers** integration system selecting the **Full File** checkbox.

   Note the number of workers in the output



Notice the data elements and the XML structure for each worker:

```
<ws:Worker>
    <ws:Summary>
        <ws:Employee_ID>21001</ws:Employee_ID>
        <ws:Name>Logan McNeil</ws:Name>
    </ws:Summary>
    <ws:Eligibility>true</ws:Eligibility>
    <ws:Personal>
        <ws:Name_Data>
            <ws:First_Name>Logan</ws:First_Name>
            <ws:Last_Name>McNeil</ws:Last_Name>
        </ws:Name_Data>
        <ws:Gender>F</ws:Gender>
        <ws:Marital_Status>Married_USA</ws:Marital_Status>
        <ws:Email_Data>
            <ws:Email_Address>lmcneil@workday.net</ws:Email_Address>
        </ws:Email_Data>
    </ws:Personal>
    <ws:Status>
        <ws:Hire_Date>2000-01-01</ws:Hire_Date>
        <ws:Original_Hire_Date>2000-01-01</ws:Original_Hire_Date>
    </ws:Status>
    <ws:Position>
        <ws:Business_Title>Chief HR Officer</ws:Business_Title>
        <ws:Worker_Type>Regular</ws:Worker_Type>
    </ws:Position>
    <ws:Compensation>
        <ws:Total_Annual_Base_Pay>212676.46</ws:Total_Annual_Base_Pay>
        <ws:Base_Pay_Currency>USD</ws:Base_Pay_Currency>
    </ws:Compensation>
    <ws:Additional_Information>
        <ws:INIT>LMM</ws:INIT>
        <ws:UNAME>lmcneil</ws:UNAME>
        <ws:WID>3aa5550b7fe348b98d7b5741afc65534</ws:WID>
    </ws:Additional_Information>
</ws:Worker>
```

Our goal is to duplicate these results when we run the integration using our ISU account.

3. Search for and select the **Create Integration System User** task
    a. User Name: *WICT-HCM-Workers-User*
    b. Password: *Use the same password as that of "lmcneil"*
    c. Click **OK** then **Done**

4. Search for and select **Create Security Group** task
    a. Type of Tenanted Security Group: *Integration System Security Group (Unconstrained)*
    b. Name: *WICT-HCM-Workers-Group*

c. Click **OK**
d. Add the Integration System User created in Step 3 and click **OK** then **Done**

5. In a new browser tab, search Workday Administrator Guide for **Reference: Security Integration Data**, click on the matching link and locate the **Reference: Security Domains for Integration System Data Access** section to identify the default required domains.

As you can see, almost 30 domains are possibly used to access all the standard fields from the Core Connector: Worker template, not including other Worker fields or new Calculated Fields.


2. Set Up Integration System User Security.

Grant the Integration System Security Group access to these domains:

- *Manage: Organization Integration*
- *Worker Data: Beneficiaries and Dependents*
- *Worker Data: Benefit Elections*
- *Worker Data: Birth Place*
- *Worker Data: Citizenship Status*
- *Worker Data: Compensation*
- *Worker Data: Compensation by Organization*
- *Worker Data: Date of Birth*
- *Worker Data: Disabilities*
- *Worker Data: Emergency Contacts*
- *Worker Data: Ethnicity*
- *Worker Data: Gender*
- *Worker Data: Home Contact Information*
- *Worker Data: Hukou (China)*
- *Worker Data: ID Information*
- *Worker Data: Leave of Absence*
- *Worker Data: Marital Status*
- *Worker Data: Military Status*
- *Worker Data: Name*
- *Worker Data: Nationalities*
- *Worker Data: Organization Information*
- *Worker Data: Personal Data*
- *Worker Data: Personal Information*
- *Worker Data: Preferred Name*
- *Worker Data: Public Worker Reports*
- *Worker Data: Religion*
- *Worker Data: Staffing*
- *Worker Data: Total Compensation*
- *Worker Data: Work Contact Information*

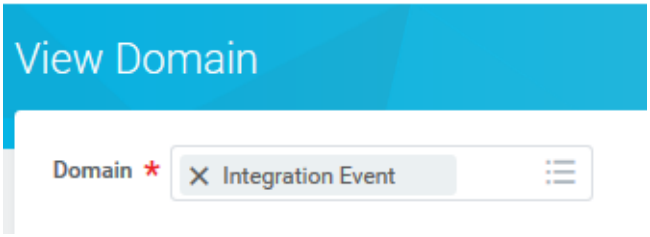
However, in the **WICT_HCM_Workers** integration system we only use the following fields:

- First Name / Last Name / Gender / Marital Status / Email Address
- Hire Date / Original Hire Date
- Business Title

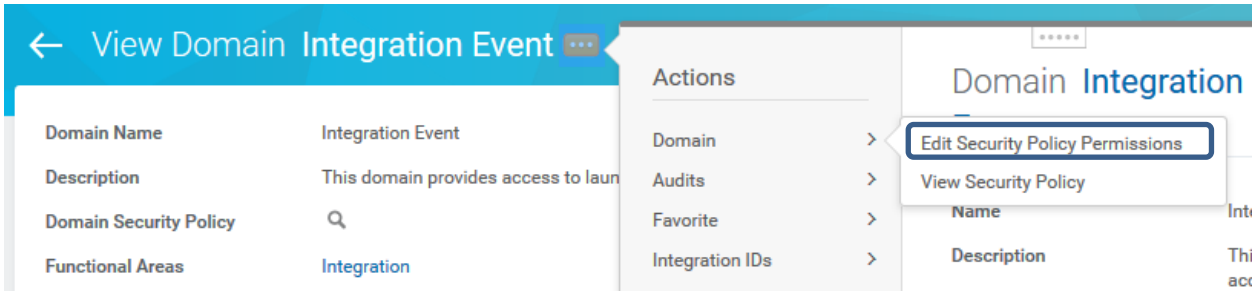
- Business Title / Worker Type
- Total Base Pay / Base Pay Currency
- Initials / User Name / Workday ID

It is likely that we don't need access to all the domains to output theses few fields. Let's start by giving the ISU the right to launch Integration Systems.

6. Search, in the tenant, for "**View Domain "** and select the report.
    a. From the report prompt, Select the **Integration Event** Domain



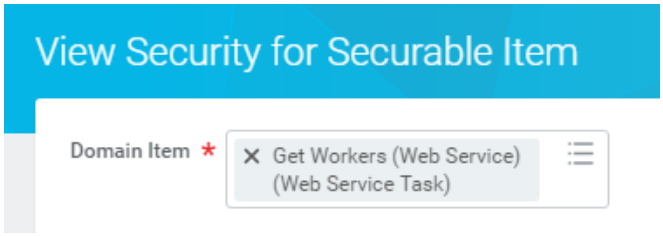
    b. Click OK
    c. Using the related actions menu of the **Domain**, navigate to **Domain > Edit Security Policy Permissions**



    d. Under Integration Permissions, click in the security group edit box to the left of the get and put permissions (enabled) and select the prompt.
    e. Search for "wict" and select the **WICT-HCM-Workers-Group** security group and press **OK** and **Done**
    Through this action we have granted the ISU the right to launch Integrations Systems

Next, provide access to most of the Worker Business Object fields. We can start with the Web Service operation used in Core Connector: Worker, "Get Workers" Note the alert message indicating that the security policy change needs to be activated. We will take care of this shortly."

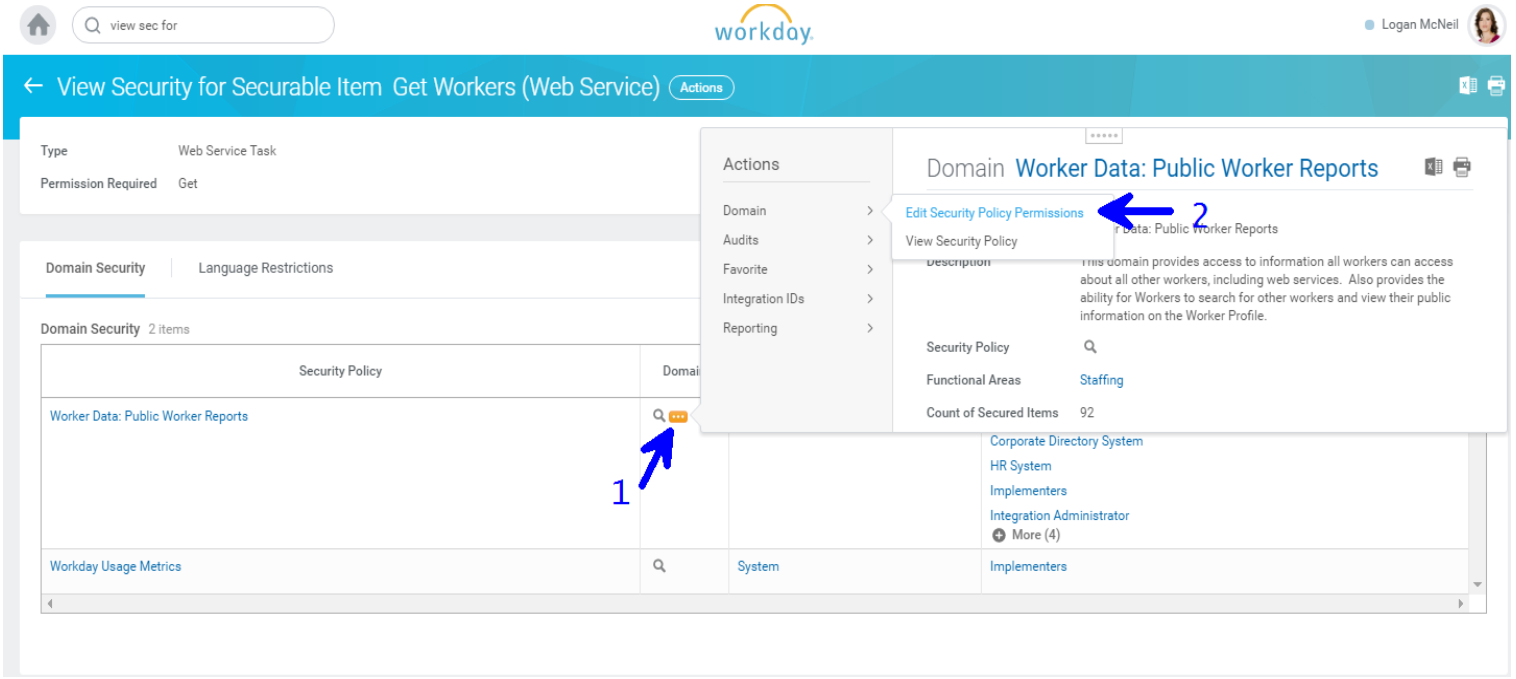
7. Search for "**View Security for Securable Item "** and select the Domain Item "Get Workers (Web Service)"



a. Click OK.

b. First, (#1), select the Related Actions item in the "Domain" column of the "Worker Data: Public Worker Reports" Security Policy, then….

c. Second, (#2), select "Edit Security Policy Permissions"



d. Under Integration Permissions, click in the security group edit box to the left of the get permission (enabled) and select the prompt.

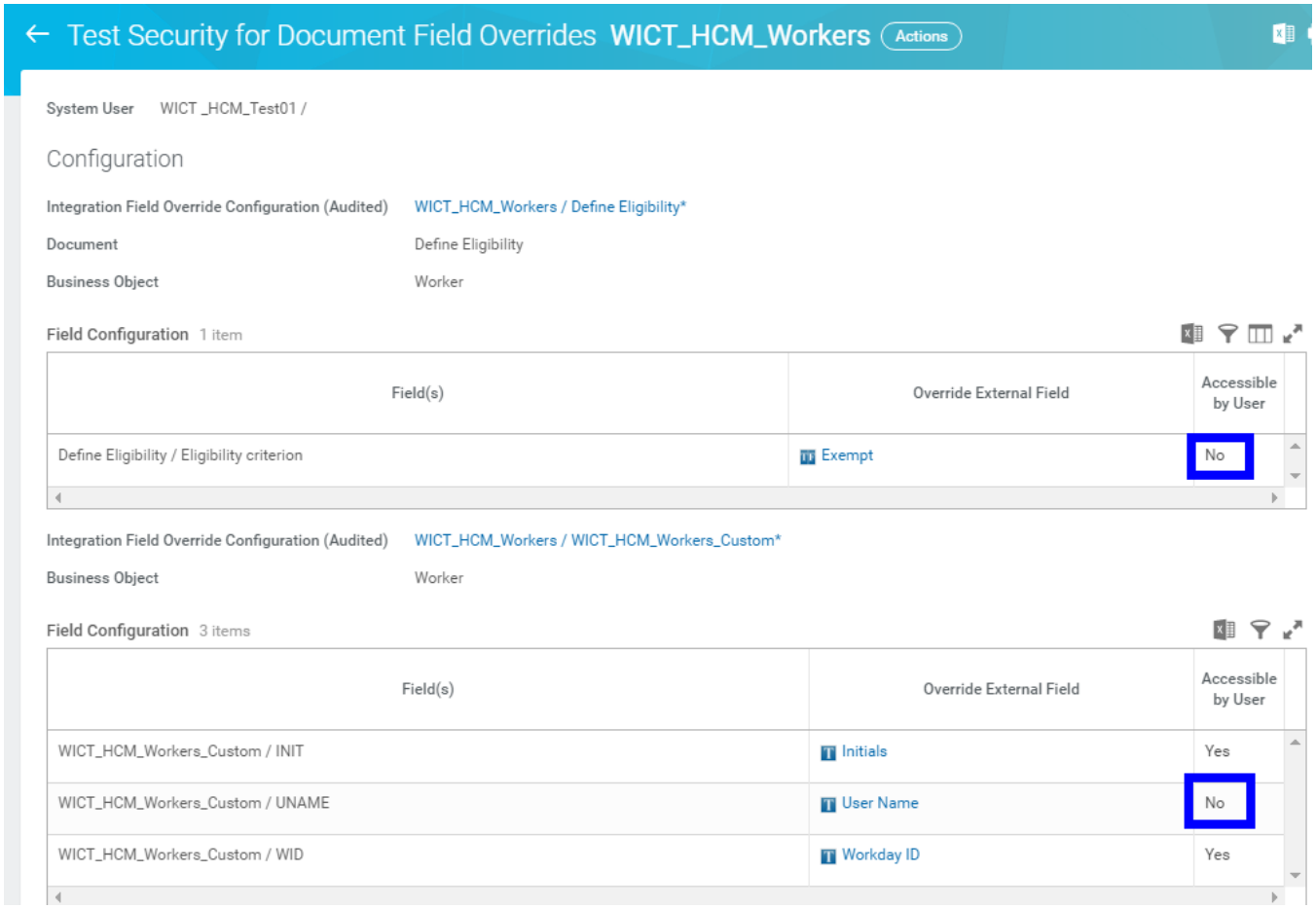
e. Search for "wict" and select the **WICT-HCM-Workers-Group** security group and press **OK** and **Done.** Note the alert message indicating that the security policy change needs to be activated. We will take care of this in the next step
This will grant our ISU access to most of the Worker data.

8. Next, these Domain Security Policy Changes must be activated. Search for and then Select the **Activate Pending Security Policy Changes** task.
   a. Enter a Comment (it's required) and click **OK.**
   b. Examine the list of pending changes and note that the updated Domain Security Policies appear in the list. Select the **Confirm** check box, it's also required.
   c. Click **OK.**

9. Add the new ISU account to the Integration. Search for and select the **WICT_HCM_Workers** integration system.
    a. Using the related actions menu, navigate to **Workday Account > Edit.**
    b. Enter the user, "WICT-HCM-Workers-User /", in the **Workday Account** field.
    c. Click **OK** twice**.**
10. At this point we should have rights to access data from the standard Data sections selected. Now, consider if we have access to data which is NOT part of one of those sections. Can the ISU associated with this integration access the data referenced in the Field Overrides?

11. To check this, run the "Test Security" option from the "Integration Field Override" item on the Related Actions menu of the WICT_HCM_Workers integration. Click **OK** on the "Test Security for Document Field Overrides" page which follows.

12. The next page will show the fields used for the Eligibility Criterion, "Exempt" and the additional Integration Fields Override items, "Initials", "User Name" and "WID". Some are accessible and others are not from the ISU account:

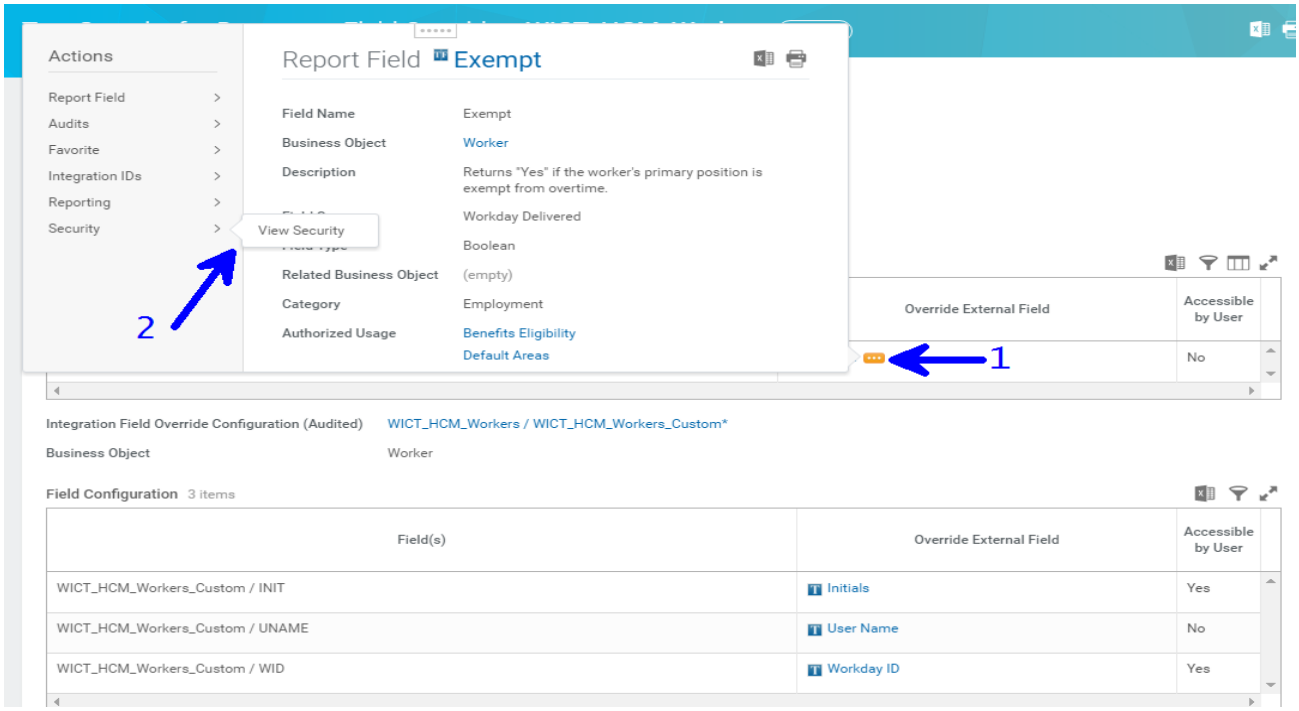


Optionally, test your Integration System User's access rights. Launch the integration system using the **Full File** option. Refresh the event until the integration completes and notice the number of workers output:

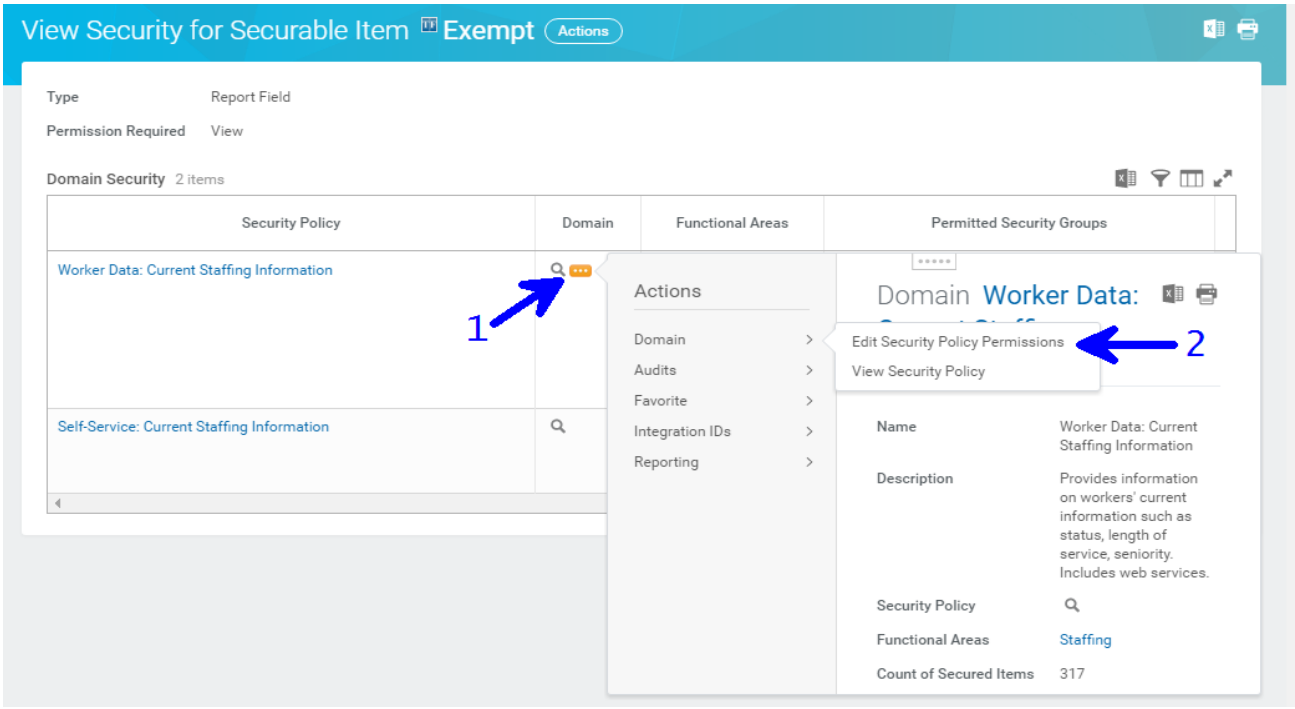
Message
Identifying eligibility for 367 workers
Diagnostic Audit for 367 workers
Attached Messages Audit. See Output Files.
Output Document for 0 workers

No workers are included in the output despite having access rights to some Worker data. This implies the ISU does not have access rights to the Eligibility Criterion field: **"Exempt".** We can infer this since we could obtain all records on the baseline run (the 185 workers selected). However, they are not eligible for the output file, as described in the Diagnostic Audit output file.

13. To allow the ISU to access these fields, select the Related Actions icon next to the "Exempt" item (#1) in the Override External Field column, then select the Security item and the "View Security" sub-item (#2), referencing the screenshot below:



14. In the View Security for Securable Item page presented, select the Related Actions icon in the Domain column for "Worker Data: Current Staffing Information" (#1). Then, select the "Edit Security Policy Permissions" entry from the Domain item in the Actions list (#2).



15. In the Edit Domain Security Policy Permissions page presented, under the Integration Permissions section, click on the Add button to create a new row.
    a. In that row, check only the "Get" checkbox.
    b. In the new "Get" only area, search for ***wict*** and select the **WICT-HCM-Workers-Group** security group and press **OK** and **Done.**

16. Repeat steps 13 through 15 for the "User Name" field which is also inaccessible from the ISU account. Start with the "Integration Field Override" item described in steps 11 and 12 above. Select the domain associated with the Workday Accounts security policy. Click in the security group edit box to the left of the get permission (enabled) option and add the WICT-HCM-Workers-Group security group.

17. Activate these changes by searching for and launching the **Activate Pending Security Policy Changes** task.
    a. Enter the required comment and click **OK.**
    b. Verify that all the domains for which you have changed the security setup appear in the list. Select the **Confirm** check box.
    c. Click **OK.**

18. Check that all the fields are now accessible using the **Integration Field Override>Test Security** item (discussed in step 11).

19. The response should show the fields used for the Eligibility Criterion, "Exempt" and the additional Integration Fields Override items, "Initials", "User Name" and "WID" are all accessible.

20. Launch the integration system using the **Full File** checkbox to test your Integration System User and verify that the integration system has all required permissions. Refresh the event until the integration completes and compare the XML elements with the set returned for Logan's instance, as in step 2 above.

21. The security issue with the Eligibility Criterion and Integration Field Overrides is resolved but the Compensation elements are not included. Let's have a look at the output file itself:

```
<ws:Worker>
   <ws:Summary>
      <ws:Employee_ID>21001</ws:Employee_ID>
      <ws:Name>Logan McNeil</ws:Name>
   </ws:Summary>
   <ws:Eligibility>true</ws:Eligibility>
   <ws:Personal>
      <ws:Name_Data>
         <ws:First_Name>Logan</ws:First_Name>
         <ws:Last_Name>McNeil</ws:Last_Name>
      </ws:Name_Data>
      <ws:Marital_Status>Married_USA</ws:Marital_Status>
      <ws:Email_Data>
         <ws:Email_Address>lmcneil@workday.net</ws:Email_Address>
      </ws:Email_Data>
   </ws:Personal>
   <ws:Status>
      <ws:Hire_Date>2000-01-01</ws:Hire_Date>
      <ws:Original_Hire_Date>2000-01-01</ws:Original_Hire_Date>
   </ws:Status>
   <ws:Position>
      <ws:Business_Title>Chief Human Resources Officer</ws:Business_Title>
      <ws:Worker_Type>Regular</ws:Worker_Type>
   </ws:Position>
   <ws:Additional_Information>
      <ws:INIT>LMM</ws:INIT>
      <ws:UNAME>lmcneil</ws:UNAME>
      <ws:WID>3aa5550b7fe348b98d7b5741afc65534</ws:WID>
   </ws:Additional_Information>
</ws:Worker>
```

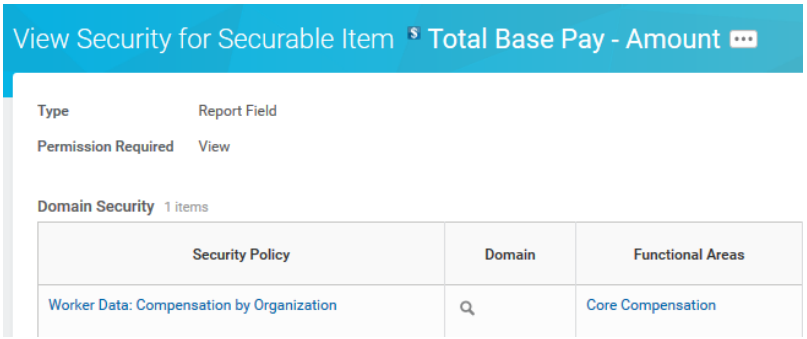
When comparing this output for Logan McNeil with our "non-ISU secured" run, we find that the Gender field and the Compensation section, including the Total Base Pay and Base Pay Currency fields, are missing from the output. Let's fix that.

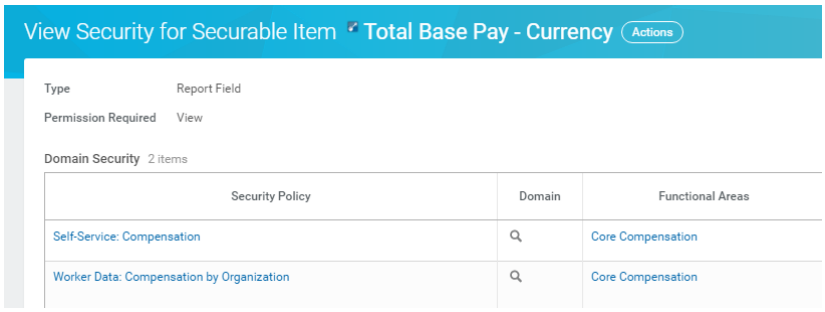
22. Run the **Business Object Details** report

    a. Enter **Worker** for the Business Object and press **OK.** (or find the Business Object with the request: "bo:worker")

    b. Click on the **Field Name** column heading, use a Filter to search for and select **Total Base Pay - Amount** and **Total Base Pay - Currency** for Value, press **Filter.** These are the fields used in the Compensation Data Section selected when we created the Integration. See Community documentation on "Reference: Core Connector: Worker Integration Data Sections" for details.

    c. Using the related actions menu of each field, navigate to **Security > View Security**. To preserve the Business Object Details report results page, right click on the item and select "See In New Tab".





Notice that the **Total Base Pay – Amount** and **Total Base Pay - Currency** fields are secured by the same domain: "Worker Data: Compensation by Organization", so giving access to the domain will enable access to both fields.

d. In either fields' *View Security for Securable Item* tabs, use the related actions menu of the **Domain** column and navigate to **Domain > Edit Security Policy Permissions.**

e. Under Integration Permissions, click in the security group edit box to the left of the get permission (enabled) option and select the prompt.

f. Search for "***wict***" and select the **WICT-HCM-Workers-Group** security group and press **OK.**

g. Repeat these same steps for the Gender field. Begin from step "b" as above, but search for the **Gender** CRF.
   - From the "Related Actions" icon, locate **Security > View Security**
   - From the "View Security for Securable Item" report result, select Action icon from the Object Inspector icon for the "Person Data: Gender" Security Policy.
   - Use the related Actions menu there to **Edit Security Policy Permissions** and add "WICT-HCM-Workers-Group" to the security group edit box to the left of the "Get Permission (enabled)" option.

23. Search for and select the **Activate Pending Security Policy Changes** task.
    a. Enter a Comment and click **OK.**
    b. Verify that all the domains for which you have changed the security setup appear in the list. Select the **Confirm** check box.
    c. Click **OK.**

24. Launch the integration system using the **Full File** option and test your Integration System User's access. The Compensation section including the Total Base Pay and Base Pay Currency fields, previously missing is now output as expected. The ISU can access all required data. Verify the ISU has the required permissions needed to collect the same data as does Logan's account.

(End of Activity)

SUPPLEMENTAL ACTIVITY 10 - Change Detection - Scheduling and Security

Business Case: Schedule Change Detection and the security requirements associated with it.

Integration Systems are associated with Integration System Users (ISUs) and ISUs are associated with a Security Group.

Permissions are assigned to Security Groups.

Processes are assigned an ISU and run with the ISU's security permissions

Scheduling a Process allows the process to run at a scheduled dates and times.

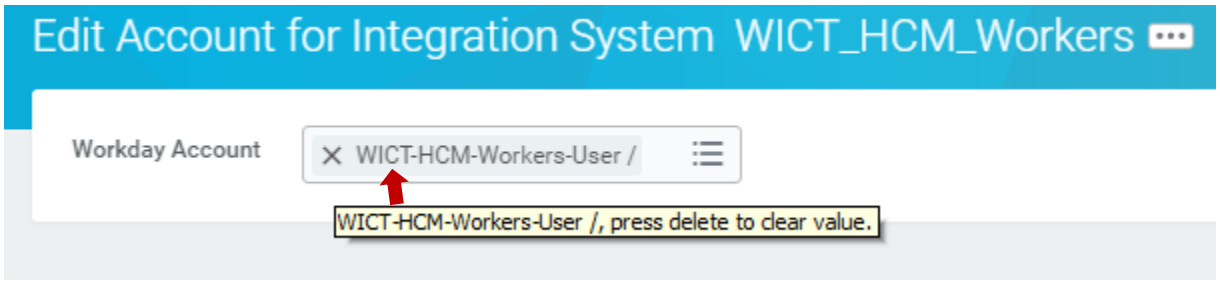
Demonstrate how the process dates should change automatically as the scheduled Process runs.

In this Activity, we'll remove the ISU created in the previous Activity and use it to schedule and run our WICT-HCM-Sync integration.

While logged-In as Logan McNeil *(lmcneil)*

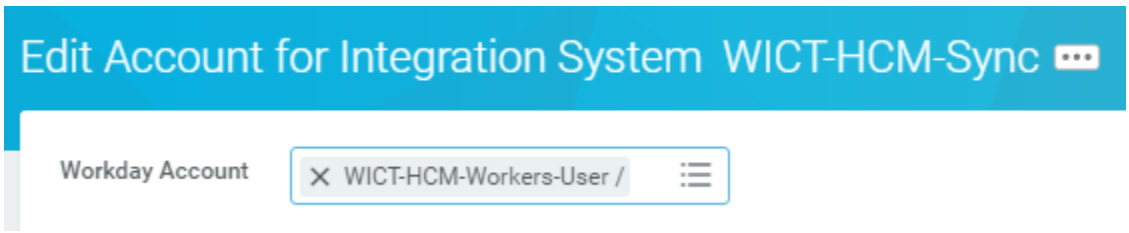
TASK #1 RE-USE INTEGRATION SYSTEM USER FROM PREVOUS ACTIVITY

1. Remove the "WICT-HCM-Workers-User" ISU reference from the the WICT_HCM_Workers Integration and save the change. Use "Available Actions" -> "Workday Account" -> "Edit" to locate this.



TASK #2: ASSOCIATE THE ISU TO THE INTEGRATION SYSTEM AND TEST

1. Open the "WICT-HCM-Sync" application and add the "WICT-HCM-Workers-User" ISU reference to this integration, saving the change. Use "Available Actions" -> "Workday Account" -> "Edit" to locate this.

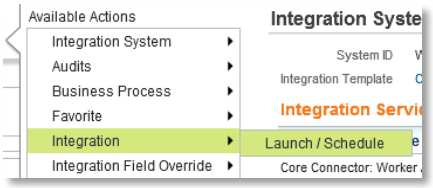


2. Search for and select the **WICT-HCM-Sync** integration system

3. Launch the integration system using the **Full File** checkbox to test your Integration System User and verify that the integration system has all required permissions. Refresh the event until the integration completes and verify workers are being output.

TASK #3: SCHEDULE THE WICT-HCM-SYNC INTEGRATION SYSTEM

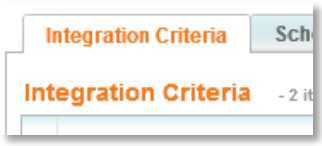
- Launch the WICT-HCM-Sync process.



- Run Frequency – Select **Daily Recurrence**.
- Click on “Ok”.
- Define **Request Name**. Select “Static Text” option

Field Name	*Entry Value*
Static Text	Class-Activity-HCM-Sync-Scheduled.

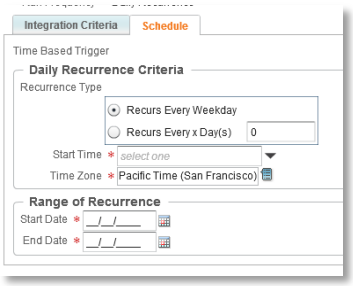
- Under Integration Criteria tab



Field Name	*Value Type*	*Value*
As Of Entry Moment	Determine Value at Runtime	Current Moment (Date Time)
Effective Date	Determine Value at Runtime	Current Moment (DateTime)
Last Successful As of Entry Moment	Determine Value at Runtime	As Of Entry DateTime of Last Completed Integration Event

Last Successful Effective Date	Determine Value at Runtime	As Of Effective Date of Last Completed Integration Event
Full File		Unchecked

- Open the **Schedule** tab



Field Name	*Entry Value*
Start Time	15 minutes from current time
Start Date	Today's Date
End Date	December 31 of current year

- Click "Ok"
- Run the **WICT-HCM-Sync** process once more, manually, before the next scheduled process will kick-off to set an appropriate "Last Successful" date and time references.

Field Name	*Entry Value*
As Of Entry Moment	3 days ago.
Effective Date	3 days ago
Last Successful As of Entry Moment	4 days ago.
Last Successful Effective Date	4 days ago.
Full File	Unchecked

These selections set the starting date and time for the scheduled runs. If the integration has not been run manually at least one time, the scheduled process will not have a valid "Last successful run" from which to start.

- To view the list scheduled processes, including this one, run the **Scheduled Future Processes** report.
- After the scheduled report runs, observe the output file from the “Integration Events” collection under “Related Actions” and “Integration System”. List below which newly hired Worker(s) appear(s) in the output file.

Today: <list date here>

Worker	*In Output File?*	*Why?*
DION JACKSON		
JACKIE WILSON		
ANDREW SHEA		
BARRY SIKES		

Tomorrow: <list date here>

Worker	*In Output File?*	*Why?*
DION JACKSON		
JACKIE WILSON		
ANDREW SHEA		
BARRY SIKES		

2 days from first process run: <list date here>

Worker	*In Output File?*	*Why?*
DION JACKSON		
JACKIE WILSON		
ANDREW SHEA		
BARRY SIKES		

- Analyze your data. Do you understand why the output varies?

(End of Activity)

SUPPLEMENTAL ACTIVITY 11 - EXPLORING XML OUTPUT AND XSLT TRANSFORMATIONS - OPTIONAL

Scenario: In this activity, you apply an XSLT transformation against output from one of the CCW integrations you have built. We'll use a browser's XSLT transform capability to test this. In the discussion on Day 5, we'll see how we can accomplish this and more with Document Transformation Integrations.

1. Create an empty folder where you can store your files. To make it easier to reference this location, keep the location simple and avoid spaces in the path to this folder. Something like a folder named "test" under the "C:\ drive would be appropriate. This would be referenced as "C:\test".

2. Locate the "WICT_HCM_Workers_Output.xml" file from one of your WICT_HCM_Workers CCW run. You can find it in the W_Drive or in the output tab from an integration run.

3. Confirm that the file contains data and then download it to the directory you created in step 1 above. This process varies depending on the browser you use. Sometimes it is placed in a temp or a download location. You can copy it from there to your testing folder. Sometimes, the file is displayed in the browser and you can right click on the page to get a "Save" option.

4. Once this integration output file is in the testing directory, unzip the archive file "3b Core Connectors and Document Transformation Class Files 30.v1.zip" into the testing directory you created above. This file is in the collection of Student Files you downloaded on Day 1.

5. In the collection of files unarchived, locate the one named "Act 5_1 Raw XSLT.xsl" and copy it to the testing directory.

6. Rename it "SA12_test.xsl" (we want to remove the spaces from the file name).

7. Use a text editor to edit the "WICT_HCM_Workers_Output.xml" file in the testing directory. Don't use Word, Pages or any word processing application.

8. Open that file and add this line as the **SECOND STATEMENT** in the file:

   <?xml-stylesheet href="file://C:/test/SA12_test.xsl" type="text/xsl" ?>

   Save the file.

9. The first two lines will then look like this:
   <?xml version="1.0" encoding="UTF-8"?>

<?xml-stylesheet href="file://C:/test/SA12_test.xsl" type="text/xsl" ?>

10. Close the file and open your browser.
11. Drag the newly edited “WICT_HCM_Workers_Output.xml” file to the open browser. The key sequence “Ctrl-O” will also prompt you to navigate and select the integration output XML file.

12. The browser will apply the XSL statements to the XML file. The built-in XSLT parser will select the referenced data and create output which looks something like this:

21001LoganMcNeilFMarried_USAlmcneil@workday.net2000-01-01212676.4621002SteveMorganMMarried_USAsmorgan@workday.net2000-01-01323559.5921003OliverReynoldsMMarried_USAoreynolds@workday.net2000-01-01392970.2121004MaximilianSchneiderMMarried_USAmschneider@workday.net2000-01-01242059.7621005TeresaSerranoFMarried_USAtserrano@workday.net2000-01-01287472.7621006MariaCardozaFSingle_USAmcardoza@workday.net2000-01-01113434.9721007JacquelineDesjardinsFMarried_USAjdesjardins@workday.net2000-01-01145594.9321008BettyLiuFMarried_USAbliu@workday.net2000-01-

13. While it may not look like it, the data is in an XML format, but it’s likely your browser will not show the element names for the data. If you want to see the XML element names, save that transformed output and look at in a text editor.

14. If you use a Chrome browser, you may have to add an option to allow Chrome to open local files; the option is “--allow-file-access-from-files” and it is added on the shortcut or command line statement you use to start Chrome. For more details see: https://chrome-allow-file-access-from-file.blogspot.com/

15. On Day 5 we’ll see how we can use this same XSL file and the same data to create a more useful transformation in a “Document Transformation” integration.

(End of Activity)

SUPPLEMENTAL ACTIVITY 12 - BUILD AN EIB

Scenario: You have been asked to create a new CSV file from an EIB. The file will be used in an employee benefits integration application. It will be used to help determine what type of service award should be given to an employee on the anniversary of his or her hire date. The file should display the employee's name and seniority per the requirements defined below. The seniority rank will be a new Calculated Field defined as follows:

If the employee's Hire Date is more than 10 years ago (from today's date), show "10+ years" in the seniority field,

- Else if between 5 and 9 years ago (from today's date), show "5-9 years" in the seniority field
- Else if between 1 and 4 years ago (from today's date), show "1-4 years" in the seniority field,
- Else if less than 1 year ago (from today's date), show "less than 1 year" in the seniority field
- Else show 'unexpected error'

Design your calculated field (Seniority) from the top down and build it from the bottom up with needed pre-requisite fields.

Details about how to build the report follow in the "EIB Data Source Report Details" section

As you construct the report, remember:

- Configure the Custom Report it with the final goal in mind.
- Since you need to create an EIB-based integration from this report, you may need to include a setting that allows the report to return data from a RESTful Web Service call.
- The CSV output will have the names of the respective columns included in the first line of the output. Label the column that includes the seniority range "Seniority".
- Since this application is still in a test phase, the output does not yet need to be sent outside Workday.

Once you run the EIB and view the output, there may be an issue:

- It contains a few rows where the Employee column is blank.
The customer is concerned about that. She asks:
- Why does that happen?
- How can I be sure that the data only lists workers who are actual GMS employees?
How would you adjust the integration to address these questions? (You don't need to implement solutions now, but consider these questions and be prepared to discuss possible ways to answer them.)

(End of Activity)

EIB Data Source Report Details – Show Employee and Senority Range Calculated Field

Scenario: Logan McNeil has been asked to create a new employee report showing the employee's seniority per the requirements defined below. The field "Seniority" will be a new Calculated field defined as follows:

If the employee's Hire Date is more than 10 years ago (from today's date), show "10+ years" in the seniority field,

Else if between 5 and 9 years ago (from today's date), show "5-9 years" in the seniority field,

Else if between 1 and 4 years ago (from today's date), show "1-4 years" in the seniority field,

Else if less than 1 year ago (from today's date), show "less than 1 year" in the seniority field

(else show 'unexpected error')

Remember to design your calculated field (Seniority) top down and build it bottom up with needed pre-requisite fields.

CREATE A NEW CUSTOM REPORT

- Run the **Create Custom Report** task and create a new report as follows:

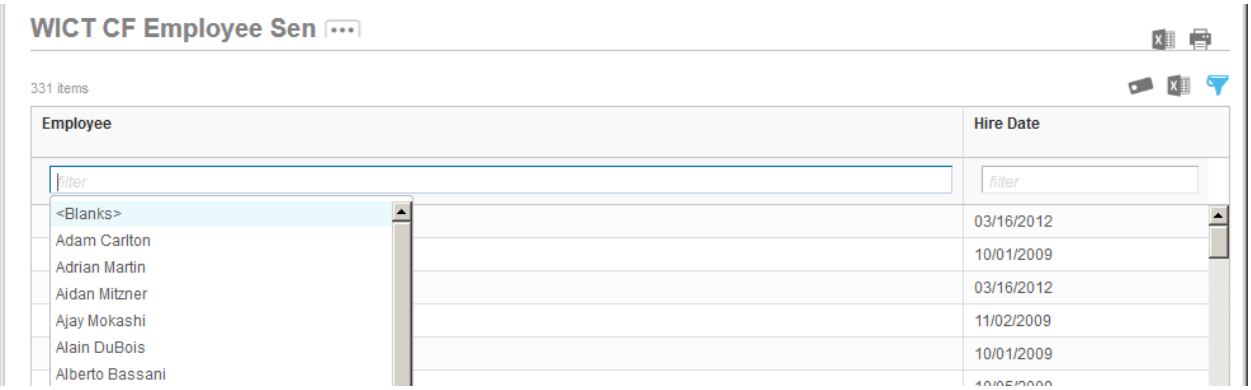
Field Name	*Entry Value*
Report Name	WICT CF Employee Seniority Report
Report Type	Advanced
Data Source	All Workers
Enable as Web Service	Checked On

Click the **OK** button to initiate the Report Writer editing page.

Add the fields by clicking on the add row icon:

a. Employee
b. Hire Date

Click **OK** to save your report and **Run** the report. Note the range of hire dates.



DESIGN YOUR CALCULATED FIELD(S) (ANSWERS ON THE FOLLOWING PAGE IF NEEDED)

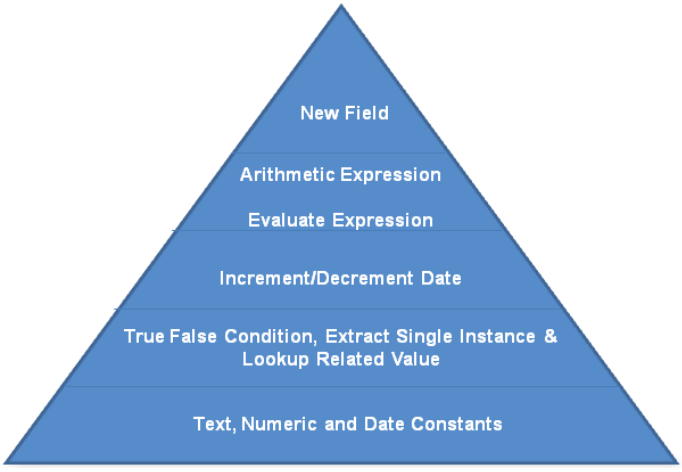
What Calculated Field function does the **Seniority** calculated field need to ultimately use?

What pre-requisite calculated fields do we need?

Any Constants?

Any True/False Conditions?

Any other Calculated Fields?



DESIGN QUESTION AND ANSWERS

- What Calculated Field function does the **Seniority** calculated field need to ultimately use?

Answer: Evaluate Expression

- What pre-requisite calculated fields do we then need?

Any Constants?

- Answer: 5 Text Constants (Global):
  - "10+ years"
  - "5-9 years"
  - "1-4 years"
  - "less than 1 year"
  - "Unexpected Error" (for the default condition)

Any True/False Conditions?

- Answer: 4 True/False Conditions:
  - Date Difference (in years) between Employee's Hire date and Today is greater than or equal to 10
  - Date Difference (in years) between Employee's Hire date and Today is greater than or equal to 5 AND less than or equal to 9
  - Date Difference (in years) between Employee's Hire date and Today is greater than or equal to 1 AND less than or equal to 4
  - Date Difference (in years) between Employee's Hire date and Today is less than 1

Any other Calculated Fields?

- Date Difference (in years) (Today – Hire Date)

Note: The numeric constants 10, 9, 5, 4, and 1 exist as Global in the tenant.

Now, build your calculated fields from the bottom up:

- Create your Global Text Constants
- Create your Date Difference field*
- Create your True/False Conditions*
- Create the Seniority Calculated field using Evaluate Expression*

**Though the report is based on the Employee Business Object (All Active Employees data source), it is best to create the needed Calc Fields on the Worker BO (higher level) so that the Calc Fields will be easily available from both the Worker and Employee Business Objects and data sources.*

If you need detailed steps, the next few pages will walk you through the steps. We encourage you to try this activity using only the design steps above to enforce your learning.

CREATE YOUR GLOBAL TEXT CONSTANTS

Select the **Create Calculated Field** task.

- Define the field as follows:

Field Name	*Entry Value*
Field Name	WICT CF 10+ years
Business Object	Global
Function	Text Constant

- Enter value: "10+ years"
- Click OK.
- **Create Another Calculation (or Copy the calculated field you just saved)**
- Define the field as follows:

Field Name	*Entry Value*
Field Name	WICT CF 5-9 years
Business Object	Global
Function	Text Constant

- Enter value: "5-9 years"
- Click OK.
- **Create Another Calculation (or Copy the calculated field you just saved)**
- Define the field as follows:

Field Name	*Entry Value*
Field Name	WICT CF 1-4 years
Business Object	Global
Function	Text Constant

- Enter value: "1-4 years"
- Click OK.
- **Create Another Calculation (or Copy the calculated field you just saved)**
- Define the field as follows:

Field Name	*Entry Value*
Field Name	WICT CF less than 1 year
Business Object	Global
Function	Text Constant

- Enter value: "less than 1 year"
- Click OK.
- **Create Another Calculation (or Copy the calculated field you just saved)**
- Define the field as follows:

Field Name	*Entry Value*
Field Name	WICT CF Unexpected Error
Business Object	Global
Function	Text Constant

- Enter value: "Unexpected Error"
- Click OK.

CREATE YOUR DATE DIFFERENCE

Create Another Calculation

Define the field as follows:

Field Name	*Entry Value*
Field Name	WICT CF Date Difference Hire Date to Today
Business Object	Worker
Function	Date Difference

- Configure as follows:
    a. Start Date: Hire Date
    b. End date: Today
    c. For value returned, select 'in years'
- Click OK.

CREATE YOUR TRUE/FALSE CONDITIONS

Create Another Calculation

Define the field as follows:

Field Name	*Entry Value*
Field Name	WICT CF 10+ years TF
Business Object	Worker
Function	True/False condition

- Click OK.
- **Create Another Calculation**

Define the field as follows:

Field Name	*Entry Value*
Field Name	WICT CF 5-9 years TF
Business Object	Worker
Function	True/False condition

- Click OK.
- **Create Another Calculation**

Define the field as follows:

Field Name	*Entry Value*
Field Name	WICT CF 1-4 years TF
Business Object	Worker
Function	True/False condition

- Click OK.
- **Create Another Calculation**

Define the field as follows:

Field Name	*Entry Value*
Field Name	WICT CF less than 1 year TF
Business Object	Worker

Function	True/False condition

- Click OK.

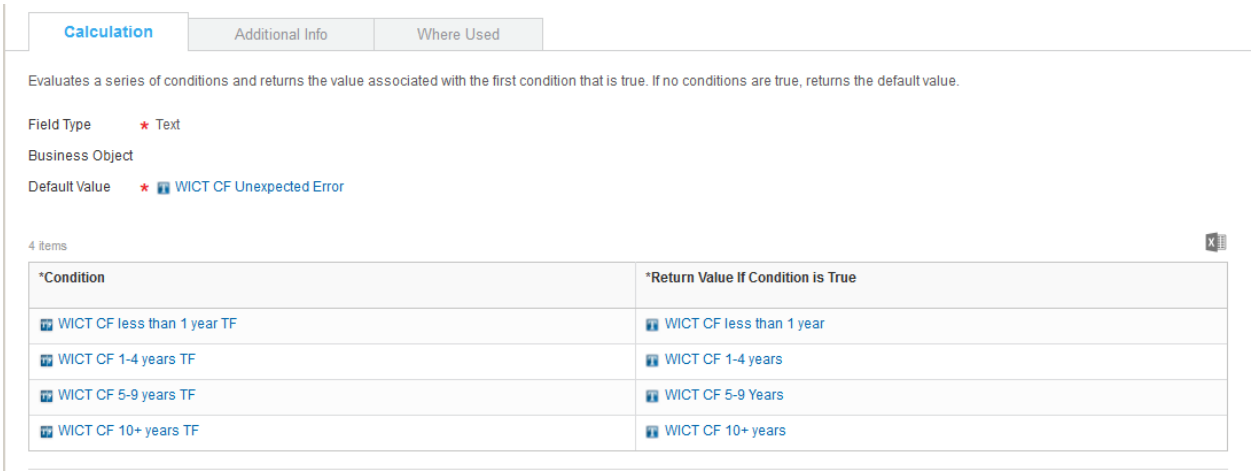
CREATE YOUR EVALUATE EXPRESSION

Create Another Calculation

Define the field as follows:

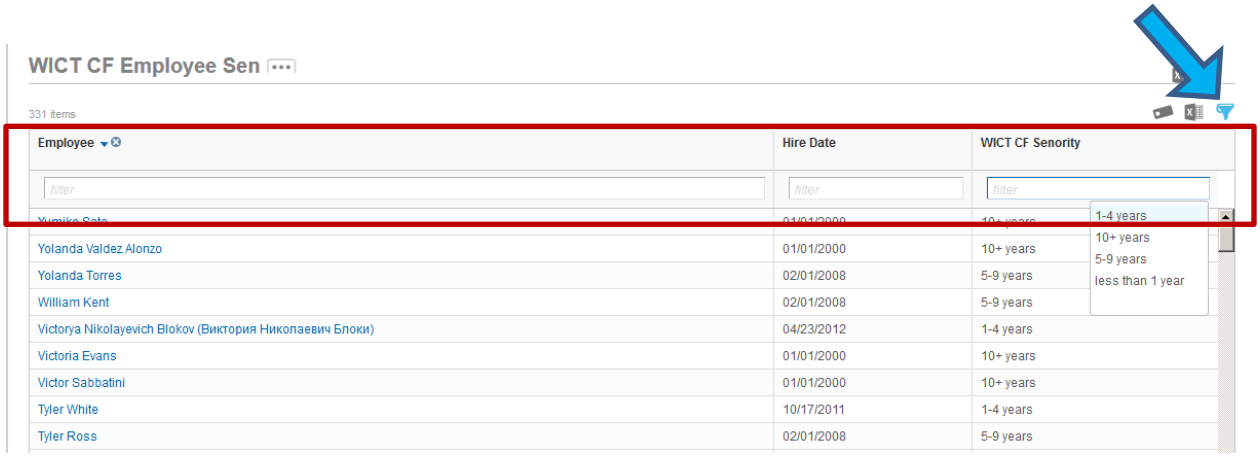
Field Name	*Entry Value*
Field Name	WICT CF Seniority
Business Object	Worker
Function	Evaluate Expression

- Click OK.
- Configure calculation as follows:



ADD YOUR CALCULATED FIELD TO THE REPORT AND TEST

Add field to report and test. Use the Report Filter (available on the "funnel" icon) to help to determine if workers are selected in the correct ranges.



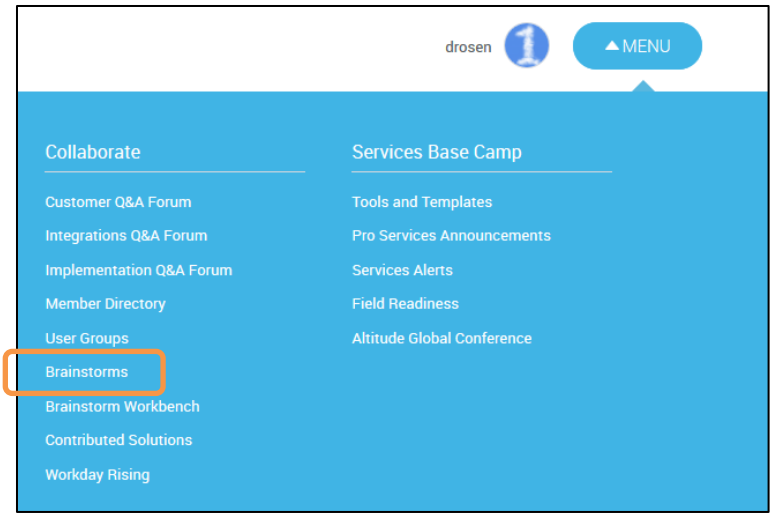
SUPPLEMENTAL ACTIVITY 13 - Join Knowledge Sharing Group

Note: The "Professional Services – Integration" Knowledge group provides consultants with key information important to integration implementations. This is a private group. Therefore, customers do not have access to this page. Students should join this group and add the knowledge sharing session calls to your calendar.

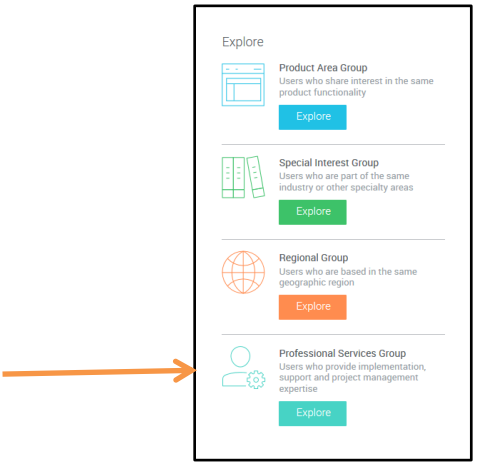
TASK #1 ADD "WORKDAY INTEGRATION" AS AN AREA OF INTEREST

Sign into Workday Community

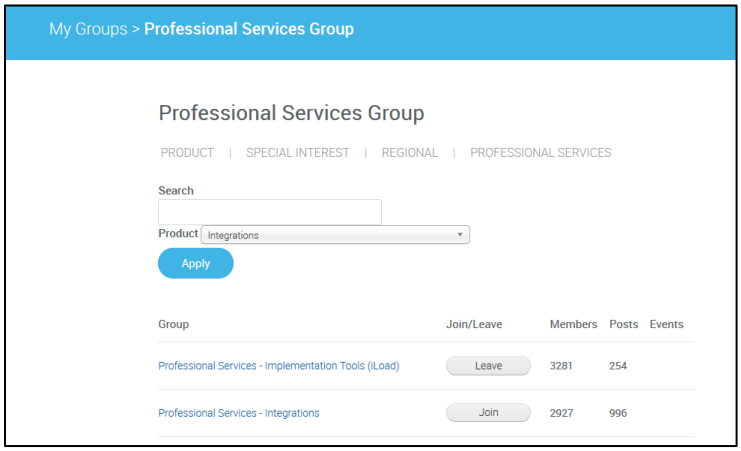
1. SELECT the menu dropdown on the top right hand side of the page and select "user groups" link beneath the "collaborate" section.



2. Click the explore button beneath the Professional services group description.

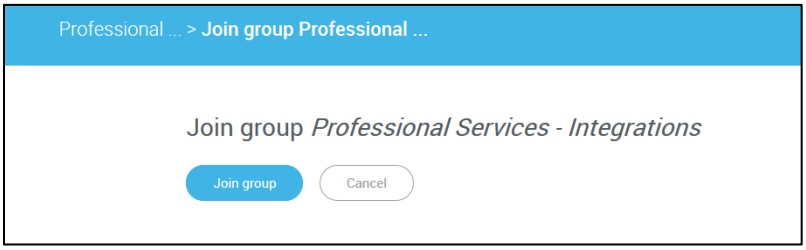


3. Select "integrations" from the dropdown labelled 'Product' and click on 'Apply" button.

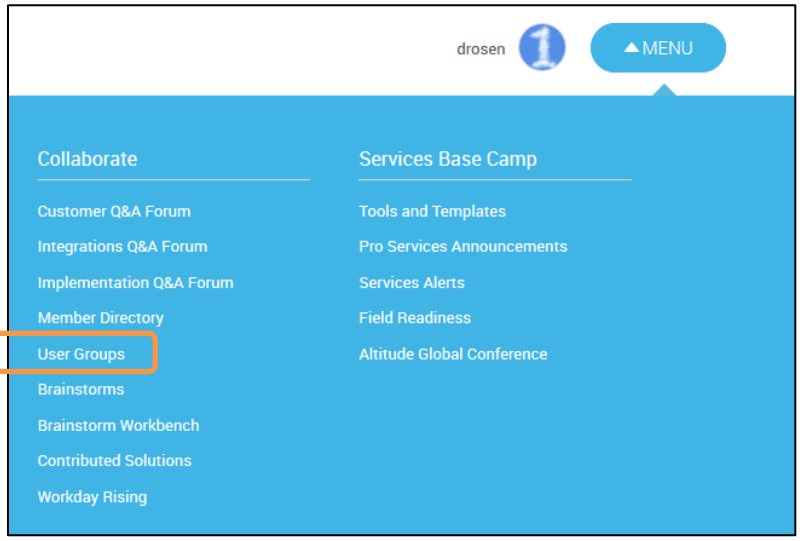


4. Click "Join" button for "Professional Services – Integrations" group.

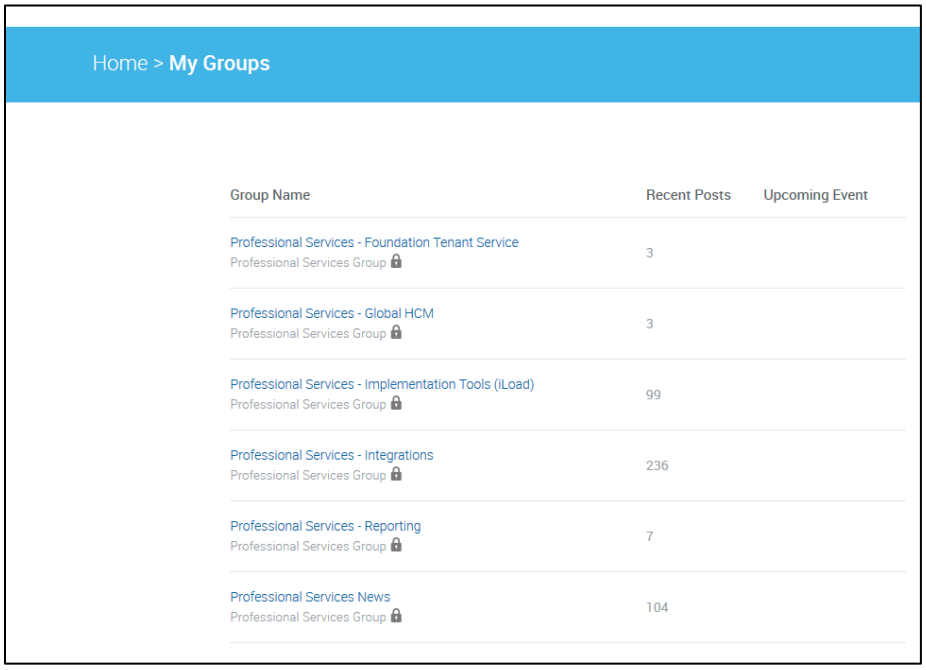
5. Click "Join group" button.



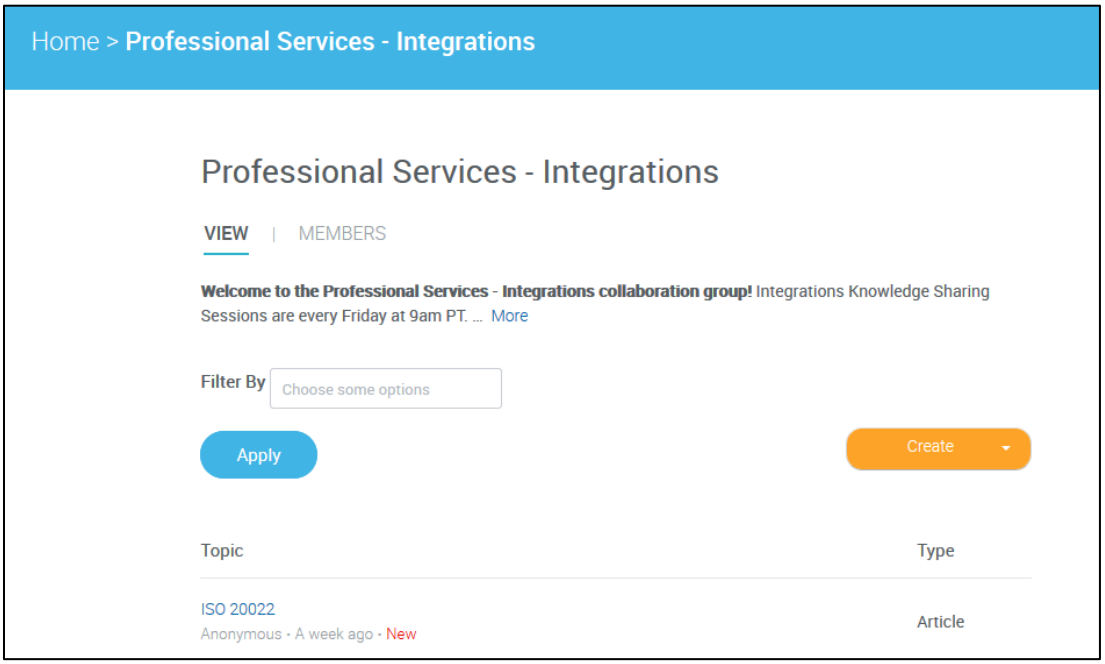
6. Select the menu dropdown on the top right hand side of the page and select "User Groups" located beneath "Collaborate" section



7. VERIFY GROUP MEMBERSHIP FOR "Professional services – Integrations"



8. CLICK "Professional services – Integrations" link.



SUPPLEMENTAL ACTIVITY 14 - Research Customer questions on Workday's Integration Tools (Blank Template)

General Information

Consultant Name:	<Enter your name >
Consultant Company:	<Enter your company's name >
Workday Product Version:	Workday XX

Customer Issue

<Enter your customer's issue >

Consultant Research Summary

<Enter a high-level summary of your response/answer to customer's issue >

Consultant Research Detail-Test Objects

Name of Test Objects	Tenant	Description	Navigation

Consultant Research Detail-Source Documentation

Source	Navigation/Links	Comments

Consultant Research Detail-Screenshots

Screenshot 1

<Paste Screenshot>

Screenshot 2

<Paste Screenshot>

SUPPLEMENTAL ACTIVITY – COMPLETED SAMPLE - RESEARCH CUSTOMER QUESTIONS ON WORKDAY'S INTEGRATION TOOLS

General Information

Consultant Name:	Harry Potter
Consultant Company:	Hogwarts Consulting
Workday Product Version:	Workday 29

Customer Issue

How do I create a simple custom report in Workday?

Consultant Research Summary

To create a simple report do the following:

- Search for the task "Create Custom Report"
- Enter the Report Name
- Select "Simple" as the Report Type
- Enter your data source (i.e. All Active and Terminated Workers)

Consultant Research Detail-Test Objects

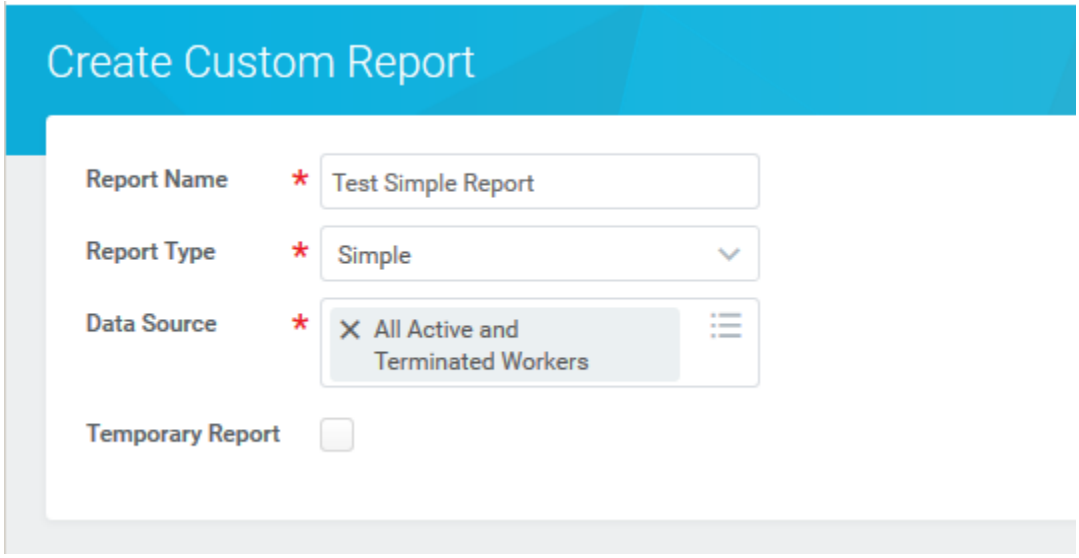
Name of Test Objects	Tenant	Description	Navigation
Test_Simple_Report	GMS	Created simple report	Login as Logan McNeil and search for the custom report: Test_Simple_Report”

Consultant Research Detail-Source Documentation

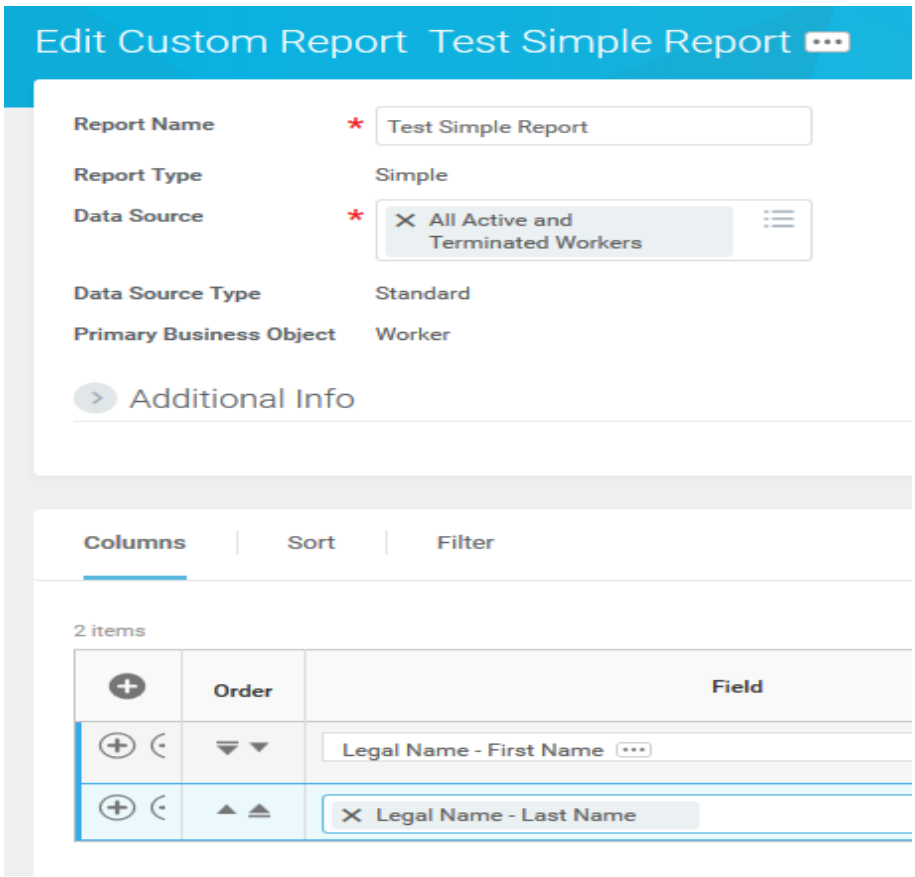
Source	Navigation/Links	Comments
Workday Online User Guide	Custom Reports and Analytics >Define Simple Reports	

Consultant Research Detail-Screenshots

Screenshot 1

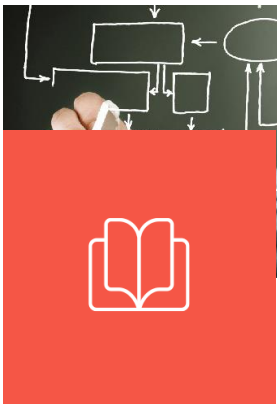


Screenshot 2



APPENDIX

- **Supplemental Activity – How to Create s Subordinate Organization and Hire Test Employees**
- **HCM Primer**
- **8 Steps to Building a Connector**
- **Change Detection - Two Conditions**
- **What the Dates mean**
- **Change Detection Terminology Inconsistencies**
- **Change Detection Flowcharts**
- **Troubleshooting Core Connector**
- **Key Resources and Links**



SUPPLEMENTAL ACTIVITY 15 – HOW TO CREATE A SUBORDINATE ORGANIZATION AND HIRE TEST EMPLOYEES

Business Case: For your exam you will need to hire multiple workers as test cases. To simplify this process, you will create a subordinate organization under the IT HelpDesk Department which has a streamlined hire process and a staffing model of job management to avoid creating positions.

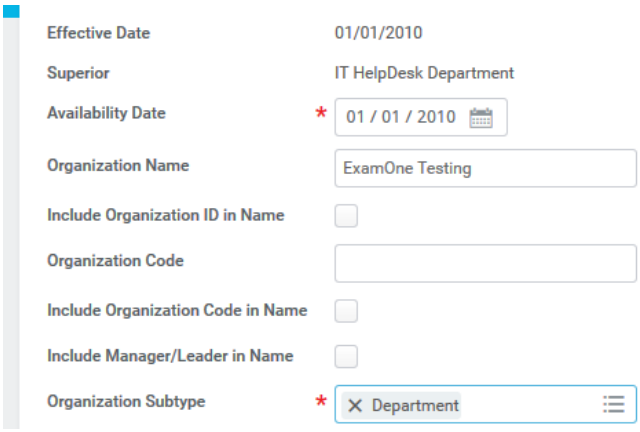
CREATE A SUBORDINATE ORGANIZATION

1. Navigate to the IT HelpDesk Department by searching for **org:it help**
2. From the supervisory organization's **Related Actions** icon, select **Reorganization > Create Subordinate**
3. Enter an **Effective Date** of **01/01/2010** and click **OK**

Note: Back dating the effective date is necessary so as to be able to enter past dated hires into this new supervisory organization.

4. Create the organization by entering the following information:

Field Name	Entry Value
Availability Date	*Leave as Default
Organization Name	ExamOne Testing
Organization Subtype	Department



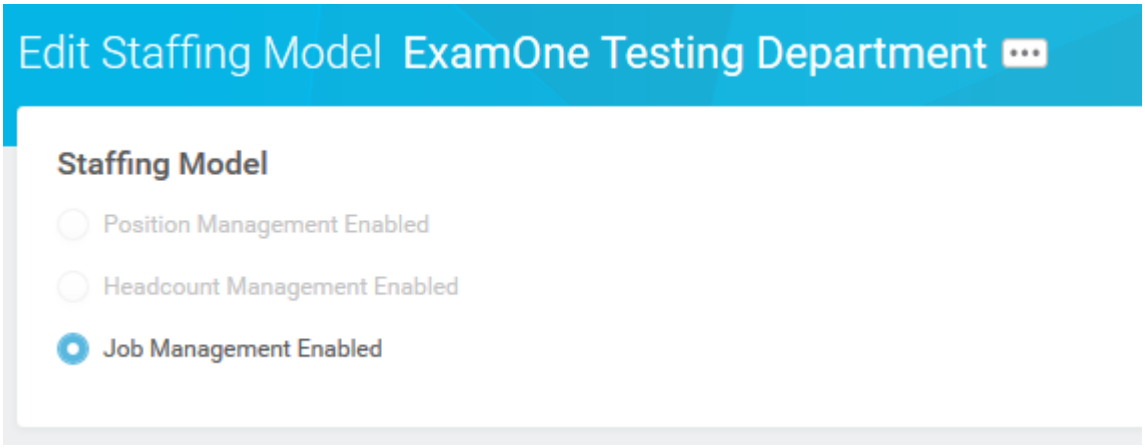
5. Click **Submit** to complete the creation of your new supervisory organization.

6. Click **Done**

7. Navigate to your new supervisory organization by searching for **org:ExamOne** and selecting **ExamOne Testing Department**.

8. From the supervisory organization's **Related Actions** icon, select **Organization > Edit Staffing Model**

9. Select **Job Management Enabled** and click **OK.**



10. From the supervisory organization's **Related Actions** icon, select **Organization > Set Hiring Restrictions**

11. Enter the following hiring restrictions:

Field Name	Entry Value
Availability Date	01/01/2010
Earliest Hire Date	01/01/2010
No Job Restrictions	Checked

12. Click **Submit** and then click **Done**.

HIRE YOUR FIRST WORKER

1. Log in as Jack Taylor (jtaylor) using the same password as Logan McNeil.

   (or use the Start Proxy task to “Act As” Jack Taylor)

2. Navigate to your supervisory organization by searching for **org:ExamOne** and selecting **ExamOne Testing Department**.

3. From the supervisory organization's **Related Actions** icon, select **Hire > Hire Employee**

4. Select **Create a New Pre-Hire** and click **OK.**

Note: To create a new pre-hire you must provide both name information (First and Last name) as well as one piece of contact information. The easiest piece of contact information to provide is an email address. Please use a fake email address such as john.doe@example.com.

5. Create the new pre-hire by entering the following **Legal Name Information**:

Field Name	Entry Value
First Name	John
Last Name	Doe

6. Select the **Contact Information** tab and click **Add** under **Email**

7. Configure the following **Contact Information:**

Field Name	Entry Value
Email Address	john.doe@example.com
Type	Home

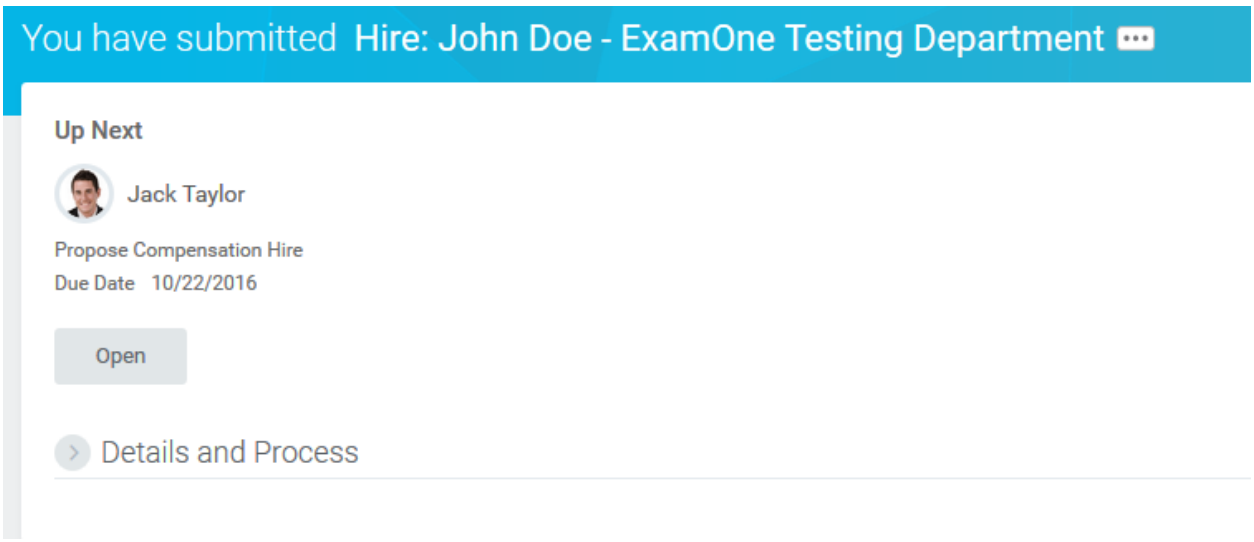
8. Click **OK** to move on to the **Hire** step.

9. Hire John Doe using the following information:

Field Name	Entry Value
Hire Date	Use Today's Date
Reason	New Hire > Fill Vacancy
Employee Type	Regular
Job Profile	IT HelpDesk Specialist
Time Type	Full Time
Location	San Francisco
Pay Rate Type	Salaried

10. Click **Submit** to move to the next step in the business process: **Propose Compensation.**

11. Click **Open**



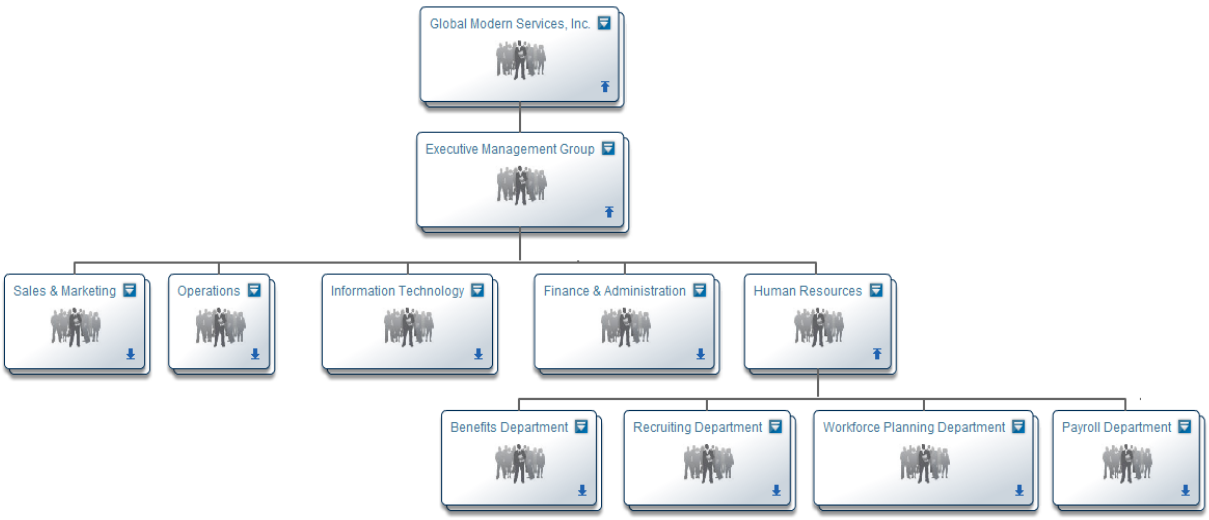
12. Scroll down to the **Salary** section and click the **Pencil** icon.
13. Enter an Amount of **65000** and click **Submit** to complete the hire of John Doe.

    (Use “Stop Proxy” task if “Start Proxy” was used for Jack Taylor’s access)

HCM PRIMER

Supervisory Organization

The primary organizational structure within Workday is the supervisory organization, which designates who reports to whom. Workers are grouped and tracked within supervisory organizations. Other organizational structures can be put into the system to represent multiple organization views, but the primary structure is the supervisory organization.



There are a number of key characteristics unique to a supervisory organization:

- Employees can only be hired into a supervisory organization.
- Organizational roles have responsibilities within a supervisory organization.
- Unique business processes can be assigned to a supervisory organization.

ORGANIZATION SET UP DATA

At least one location must be entered into the system prior to creating a supervisory organization because Location is a required field when creating a supervisory organization. A location represents:

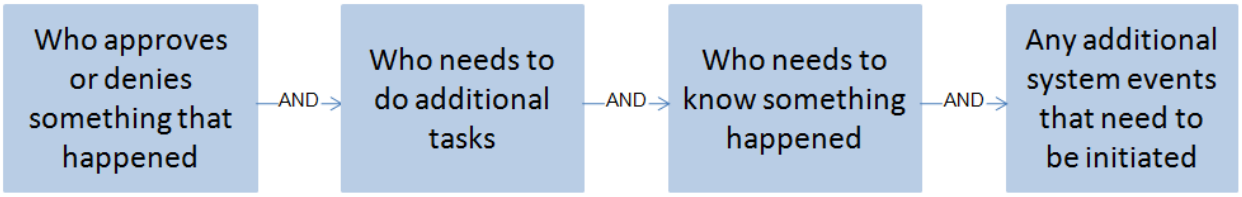
- A physical location.
- Address, email, and any associated phone numbers.
- Time Profile—defines the standard number of hours worked in that location each week. Usually this is 40 hours (8 hours per day), but in locations such as Paris the work week might be defined as 35 hours. The time profile is created prior to creating the location.

Defining Business Processes

Workday's Business Process Framework lets you define and implement business processes to suit the way a customer's company works. You choose the tasks that compose a business process, who must complete them, and in what order they must be completed. You can create different versions of the same business process for different organizations. You can define custom business processes for any supervisory organization. The business process logic is inherited, so subordinate organizations automatically use a business process defined for a superior organization, unless the subordinate organization has its own version of the process.

The Business Process Framework uses roles to control who performs the tasks that make up a business process. Because tasks are associated with specific roles, and not with specific people, workers can move into and out of those roles without disrupting the business process logic.

Business Process Definitions determine:

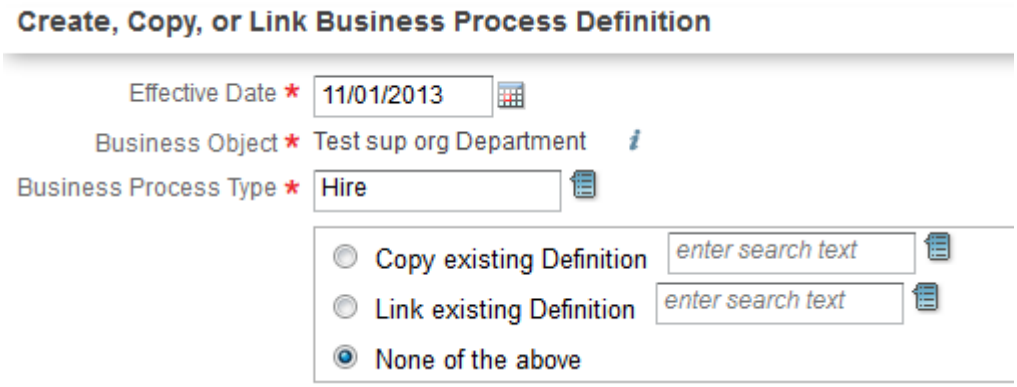


Business processes are created using a combination of Actions, Approvals, Approval Chains, To Dos, and/or Checklists. An Action can be a single task or it can be a sub process which is also a combination of Actions, To Dos, and/or Checklists. Within the process, conditions can be defined which will define whether a step will be initiated. Notifications can also be defined to notify a Workday user that a step has begun, completed, or that a particular review response was selected, e.g., Deny.

The difference between Actions, Approvals and To Dos:

- Action – Tasks or event within Workday
- Approvals – Approval of a task or event within Workday
- To Do – Reminder to do something that happens either inside or outside of Workday

For our class, we recommend you create a business process with only an initiation step when testing. See below:



Security Groups

Workday data is accessible only through the configurable security structure that is enforced by the Workday Object Management System (OMS). No Workday user can view data that is not granted with his or her security group. For example, a person in the Security Administrator security group can grant passwords to gain access to the Workday system, but the Security Administrator cannot see compensation data unless he or she also has the role of Compensation Partner.

Roles are also used to drive business process management. With Workday, you can configure which security groups and roles participate in a business process, and which security groups can grant access to tasks and reports.

Rules of security groups:

- Assigned two ways:
  - Security groups can be assigned by the system based on a process
  - Security groups can be assigned manually

Security groups:

- Control what you can do
- Control what you can access
- Are used in business processes

SECURITY GROUPS AND WORKERS

A security group is a collection of system users. Users can either be grouped explicitly (user-based security group) or by deriving group membership from other relevant information about the user. The types of security groups are:

- User-based
- Job-based
- Role-based (constrained)
- Organization Membership
- Location Membership
- Aggregation
- Intersection
- Segment- Based
- Integration System (constrained)
- Integrations System (unconstrained)

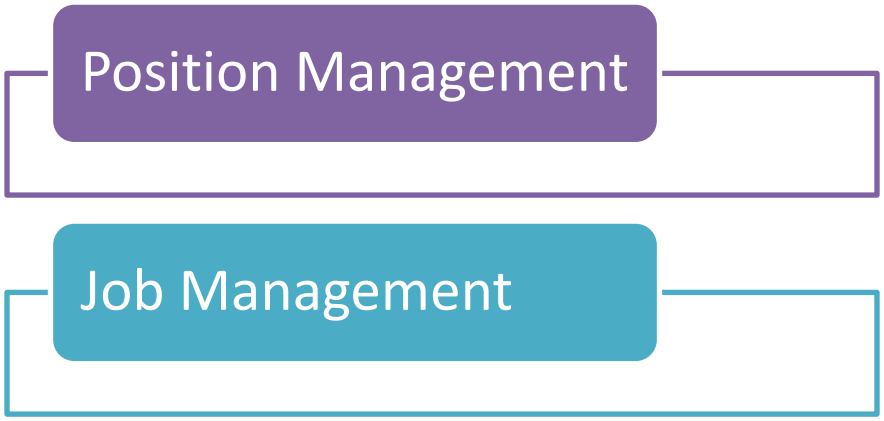
Create Pre-Hires

The hire process is initiated off of a pre-hire record. If you chose to manually enter your pre-hires, you can enter contact information such as name, address, phone, and email address. Things to know when entering an pre-hire:

- A pre-hire must have at least one piece of contact information: a phone number, email address or a street address.
- Pre-hire status applies to a specific position, not the pre-hire as a whole.

Staffing Models and the Hire Process

We will briefly review staffing models, which are used, at their simplest, to determine how positions are defined and filled, provide different levels of control over staffing, and support different staffing goals. Every supervisory organization must be associated with a single staffing model. This chapter provides specific information about the differences between the two primary staffing models available within Workday.



Staffing Models and the Hire Process

A position consolidates key job information, such as job family, job profile, worker type and location, as well as whether the worker is full-time or part-time. You may also define required qualifications, experience, and education level for positions.

The two primary types of staffing models are Position Management and Job Management. Each of these staffing models provides a different level of control over staffing and supports different staffing goals.

Position Management:

- A single position is created to be filled
- Hiring restrictions are established
- To hire, promote, demote, or transfer into a position, the position must be approved and available as of the worker's start date
- Positions remain open after a transfer, demotion, promotion or termination
- Positions can be moved from one supervisory organization to another as part of a job change
- A position must be closed if it is no longer needed

Job Management:

- Hiring restrictions are established
- No quantity is defined

- Position no longer exists after a worker is transferred, demoted, promoted or terminated unless moved with the employee

Hire Process

Hiring an employee includes recording information about the worker, assigning the worker to a position or job and defining terms of employment such as location, hours or compensation. When hiring, you can use an Existing Pre-Hire or add a new pre-hire. Either way, you have an opportunity to record pre-hire source information.

Information required to complete an employee hire includes:

- Hire Date
- Position
- Job Profile
- Time Type (full or part time)
- Location
- Scheduled Weekly Hours

Quick Sheet of Key HCM Tasks

- **NOTE: Please be aware that there are Open Positions in the Global Modern Services organization. You may be able to use these for testing, etc. Run the Open Positions Report to review them.**

- **Creating a Pre-hire**
  1. Type "Create Pre-hire" task in the search bar
  2. Enter all required information (i.e. name and at least 1 piece of contact information)
  3. Click the submit button

- **Creating a Supervisory Organization**
  1. Type "Create Supervisory Organization" task in the search bar
  2. Choose the reorganization event "Initial Implementation (01/01/2000)"
  3. Enter all required information
  4. Enter an Organization Name
  5. Choose any organization subtype
  6. Choose any organization visibility as "Everyone"
  7. Choose either "Position Management" or "Job Management" staffing model
  8. Click the submit button
  9. Assign the necessary role based security (i.e. manager, HR Partner etc..)
     Click on the related action Roles>Assign Roles

- **Creating a Position (Position Management Staffing Model)**
  Note: This task invokes a business process. For this class ONLY, we recommend you use a business process with just an initiation step. You may have to strip an existing business process or create a new one.

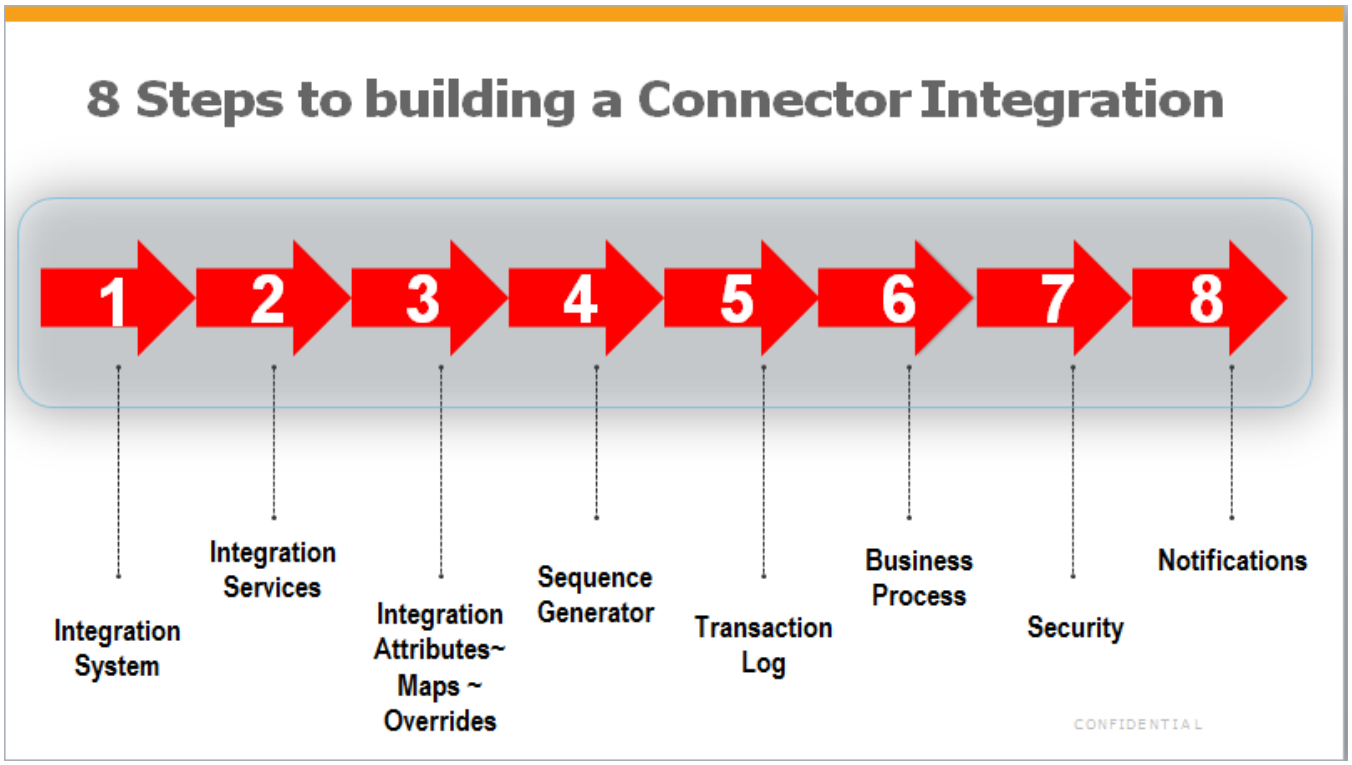
  1. Type "Create Position" task in the search bar
  2. Select your Supervisory Organization
  3. Enter all required information. *For this class ONLY, the availability and earliest hire date should be set to 01/01/2000.*
  4. Click the submit button

- **Setting Hiring Restrictions (Job Management Staffing Model)**
  Note: This task invokes a business process. For this class ONLY, we recommend you use a business process with just an initiation step. You may have to strip an existing business process or create a new one.

  1. Navigate to your Supervisory Organization
  2. Click on the related action button and choose Organization> Set Hiring Restrictions
  3. Enter all required information. *For this class ONLY, the availability and earliest hire date should be set to 01/01/2000.*
  4. Click the submit button

- **Hire Employee**
  Note: This task invokes a business process. For this class ONLY, we recommend you use a business process with just an initiation step. You may have to strip an existing business process or create a new one.

  1. Navigate to your Supervisory Organization
  2. Click on the related action button and choose Hire > Hire Employee
  3. Choose an Existing Pre-Hire or create a new pre-hire
  4. Enter all required information.
  5. Click the submit button



What the Dates Mean

Data pulled for an integration can be based on the date information was **entered** and/or the **effective** date using ranges.

Integration will reference data for transactions falling in these date ranges.

Entry Date Range

- Last Successful As of Entry Moment is the START label.
- As of Entry Moment is the END date label.

Effective Date Range

- Last Successful Effective Date is the START label.
- Effective Date is the END date label.

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Change Detection – Terminology Inconsistencies

Synonymous terms are used for the four different Launch Date Parameters. The term used is dependent on where you are viewing them in the system.

Launch / Schedule Page	View Background Process/View Event Pages	Diagnostic/Data Changes Audit Files	Message Audit: Output XML Files
As of Entry Moment	As Of Entry DateTime	Current Data Entry Time	Current_Entry_Time
Effective Date	As Of Effective Date	Effective To Date	Current_Effective_Time
Last Successful As of Entry Moment	Begin Entry DateTime	Prior Data Entry Time	Prior_Entry_Time
Last Successful Effective Date	Begin Effective Date	Effective From Date	Prior_Effective_Time

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Change Detection Algorithm (High-Level View)

At a high level, Workday uses a three-step process to detect and report changes:

1. From a WWS request, OMS identifies which worker instances meet the defined eligibility criterion and, optionally, the transaction log criteria, for the defined date ranges. For these instances, the data at the beginning (historic) and end (current) of the date ranges are sent back to the Integration. (Selection Stage)
2. The Integration examines the values of the fields selected for output. It compares the values of those fields between the historic and current record "snapshots". (Compare Stage)
3. If the worker instance had any changes between those field "snapshots", the current "snapshot" is included in the output. (Output Stage)

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The Core Connector Change Detection Conditions

Change Detection – Two Conditions Are Checked

Condition 1

Pick up everything that was newly entered and current or prior effective since the last time the integration ran.

Condition 1: Was the change entered within the Entry date range?

- No: Test Condition 2.
- Yes: Was the change effective on or before the end of the Effective date range?
  - Yes: Check for changed fields.
  - No: Move to next record.

Condition 2

Pick up everything that was newly effective and a current or prior entry since the last time the integration ran.

Condition 2: Was the change effective within the Effective date range?

- No: Move to next record.
- Yes: Was the change entered on or before the end of the Entry date range?
  - Yes: Check for changed fields.
  - No: Move to next record.

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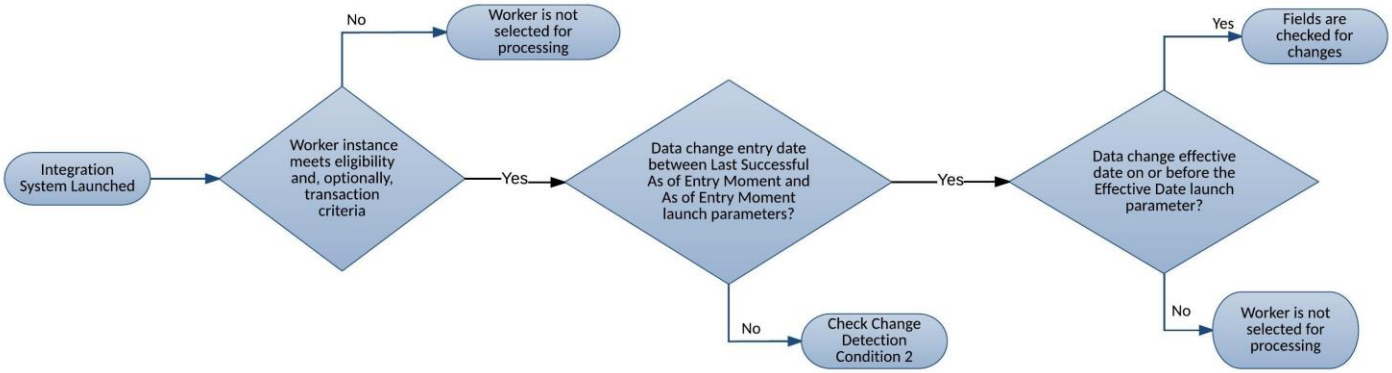
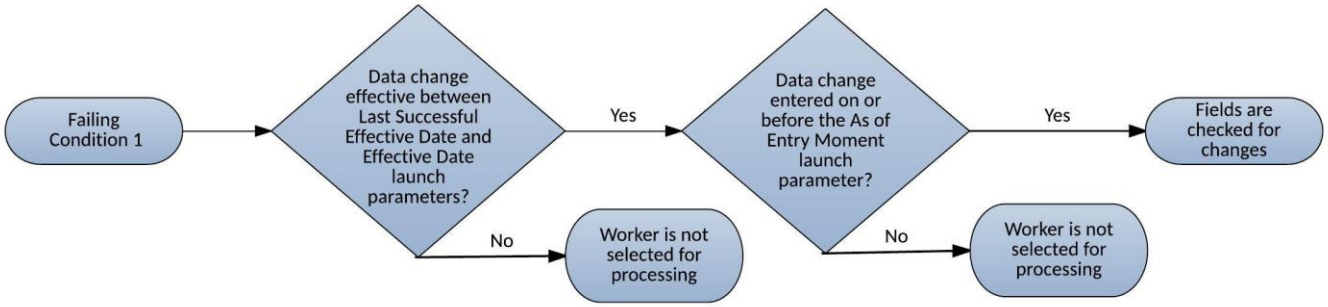
Change Detection Flowcharts

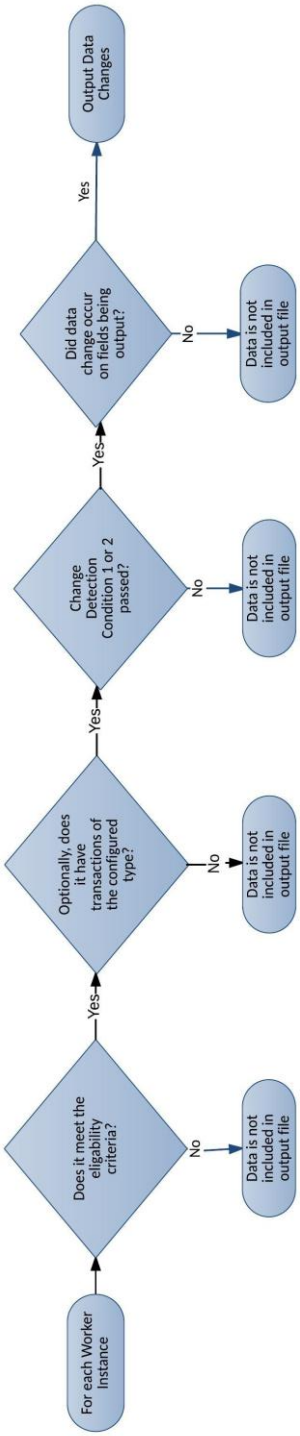
Condition 1



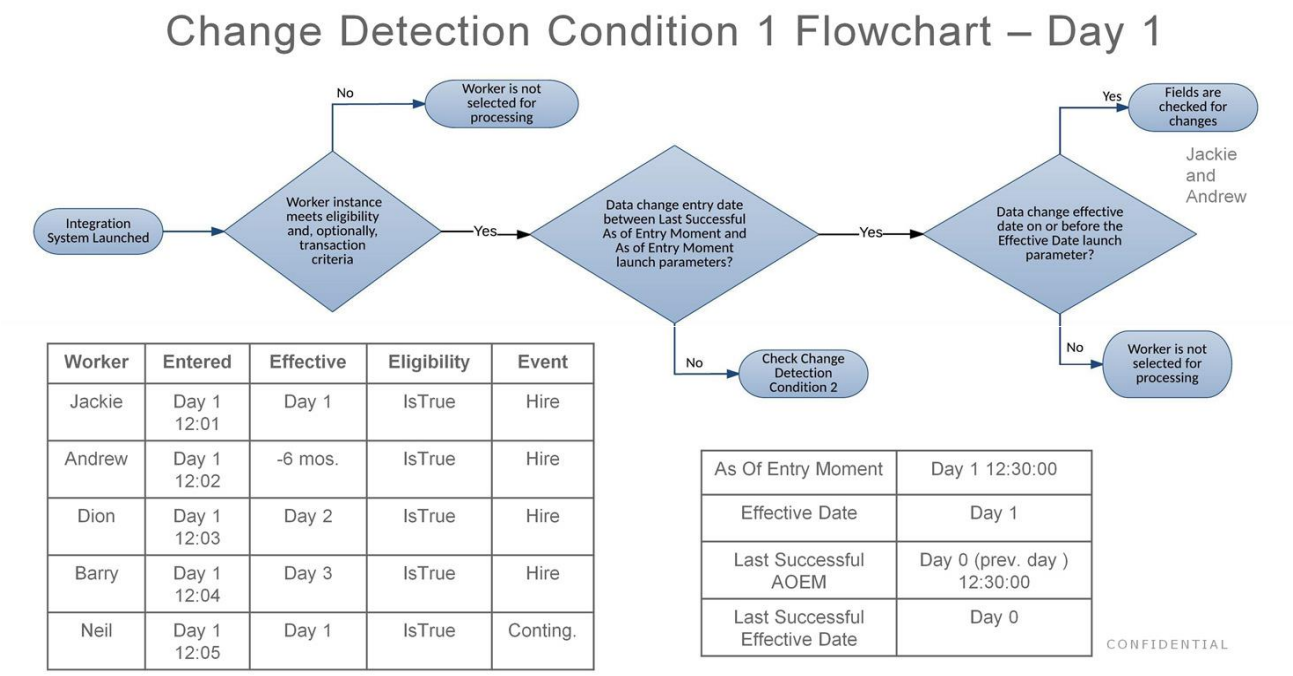
Condition 2



Core Connector Change Detection Criteria Flowchart



How do these conditions apply in our WICT-HCM-Sync Integration?



Worker	Entered	Effective	Eligibility	Event
Jackie	Day 1 12:01	Day 1	IsTrue	Hire
Andrew	Day 1 12:02	-6 mos.	IsTrue	Hire
Dion	Day 1 12:03	Day 2	IsTrue	Hire
Barry	Day 1 12:04	Day 3	IsTrue	Hire
Neil	Day 1 12:05	Day 1	IsTrue	Conting.

As Of Entry Moment	Day 1 12:30:00
Effective Date	Day 1
Last Successful AOEM	Day 0 (prev. day) 12:30:00
Last Successful Effective Date	Day 0

Change Detection Condition 1 Flowchart – Day 1
Disposition of each instance:
All instances meet the Eligibility Criterion (EC) of “IsTrue”.

Jackie - meets 1st test – EC & Tx. Log Hire Event. Is entry date between AOEM & Last Successful AOEM? Yes. Is Effective Date on or before Effective Date parm? Yes – Included in output

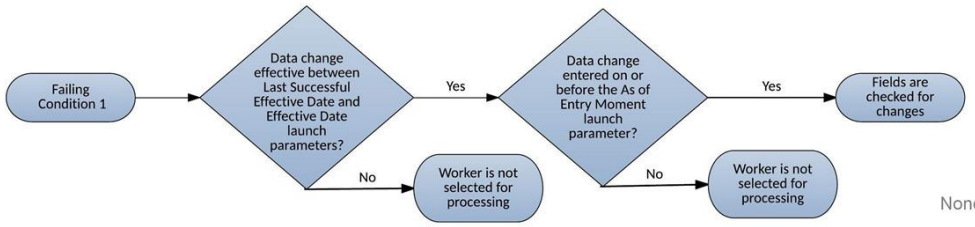
Andrew - meets 1st test – EC & Tx. Log Hire Event. Is entry date between AOEM & Last Successful AOEM? Yes. Is Effective Date on or before Effective Date parm? Yes (long before) – Included in output

Dion - meets 1st test - – EC & Tx. Log Hire Event. Is entry date between AOEM & Last Successful AOEM? Yes. Is Effective Date on or before Effective Date parm? No – not in output

Barry - meets 1st test - – EC & Tx. Log Hire Event. Is entry date between AOEM & Last Successful AOEM? Yes. Is Effective Date on or before Effective Date parm? No – not in output

Neil - meets EC test, but does NOT have the Tx. Log hire event since he’s a contingent worker – not included in output.

Change Detection Condition 2 Flowchart – Day 1



None selected

Worker	Entered	Effective	Eligibility	Event
Jackie	Day 1 12:01	Day 1	IsTrue	Hire
Andrew	Day 1 12:02	-6 mos.	IsTrue	Hire
Dion	Day 1 12:03	Day 2	IsTrue	Hire
Barry	Day 1 12:04	Day 3	IsTrue	Hire
Neil	Day 1 12:05	Day 1	IsTrue	Conting.

As Of Entry Moment	Day 1 12:30:00
Effective Date	Day 1
Last Successful AOEM	Day 0 (prev. day) 12:30:00
Last Successful Effective Date	Day 0

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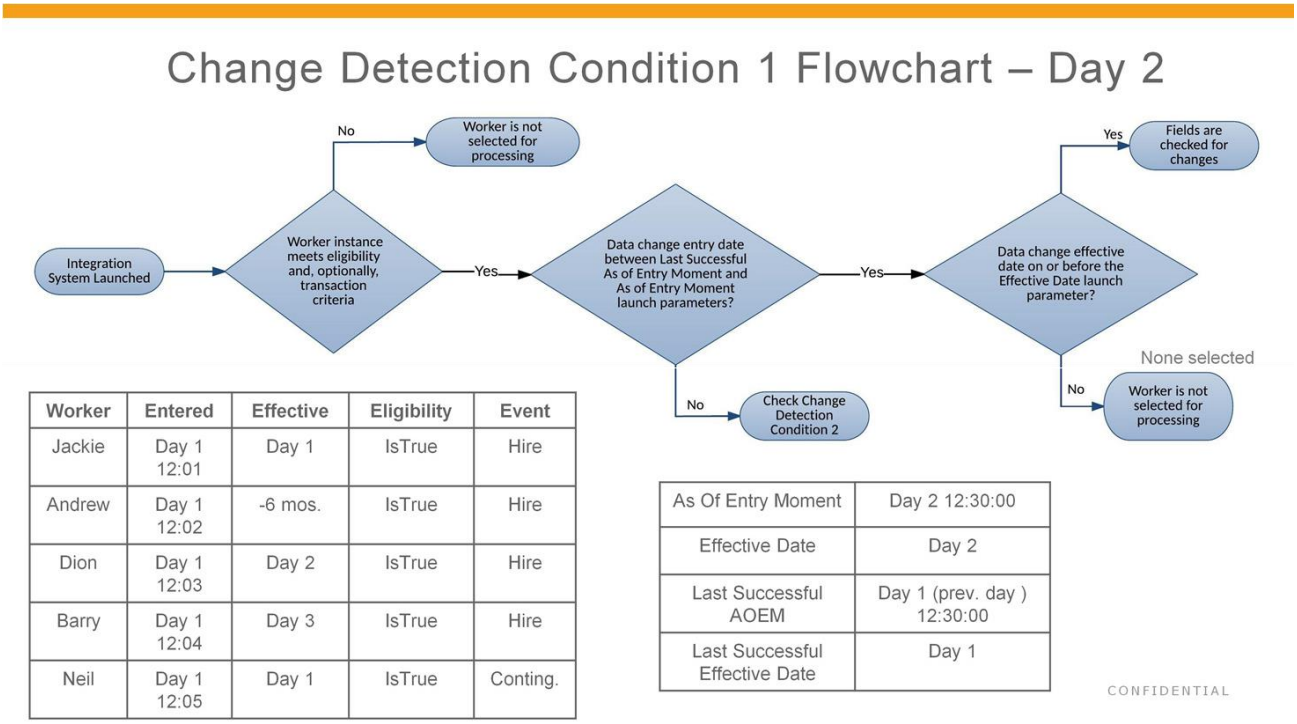
Change Detection Condition 2 Flowchart – Day 1
Disposition of each:

None of these tests are used on the Day 1 run….let’s see how things look for the run 24 hours later….



Worker	Entered	Effective	Eligibility	Event
Jackie	Day 1 12:01	Day 1	IsTrue	Hire
Andrew	Day 1 12:02	-6 mos.	IsTrue	Hire
Dion	Day 1 12:03	Day 2	IsTrue	Hire
Barry	Day 1 12:04	Day 3	IsTrue	Hire
Neil	Day 1 12:05	Day 1	IsTrue	Conting.

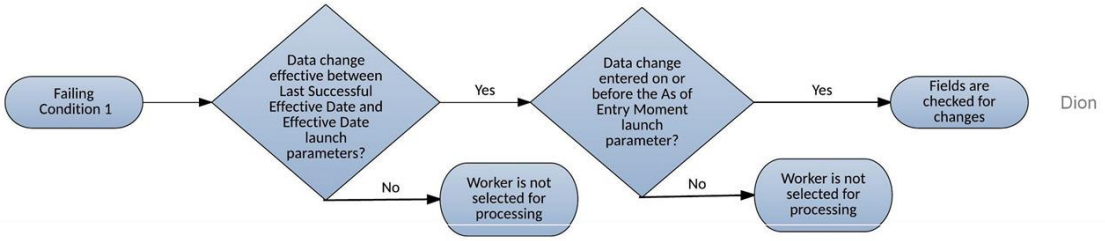
As Of Entry Moment	Day 2 12:30:00
Effective Date	Day 2
Last Successful AOEM	Day 1 (prev. day) 12:30:00
Last Successful Effective Date	Day 1

Change Detection Condition 1 Flowchart – Day 2
24 Hours later the run happens again…..

Disposition of each instance:
All instances still meet the Eligibility Criterion (EC) of “IsTrue”.

Jackie - meets 1st test – EC & Tx. Log Hire Event. Is entry date between AOEM & Last Successful AOEM? No. (the entry was on Day 1), so test in Condition Two.
Andrew - meets 1st test – EC & Tx. Log Hire Event. Is entry date between AOEM & Last Successful AOEM? No. (the entry was on Day 1), so test in Condition Two.
Dion - meets 1st test - – EC & Tx. Log Hire Event. Is entry date between AOEM & Last Successful AOEM? No. (the entry was on Day 1), so test in Condition Two.
Barry - meets 1st test - – EC & Tx. Log Hire Event. Is entry date between AOEM & Last Successful AOEM? No. (the entry was on Day 1), so test in Condition Two.
Neil - meets EC test, but does NOT have the Tx. Log hire event since he’s a contingent worker – not included in output as on Day 1.

Change Detection Condition 2 Flowchart – Day 2



Worker	Entered	Effective	Eligibility	Event
Jackie	Day 1 12:01	Day 1	IsTrue	Hire
Andrew	Day 1 12:02	-6 mos.	IsTrue	Hire
Dion	Day 1 12:03	Day 2	IsTrue	Hire
Barry	Day 1 12:04	Day 3	IsTrue	Hire
Neil	Day 1 12:05	Day 1	IsTrue	Conting.

As Of Entry Moment	Day 2 12:30:00
Effective Date	Day 2
Last Successful AOEM	Day 1 (prev. day) 12:30:00
Last Successful Effective Date	Day 1

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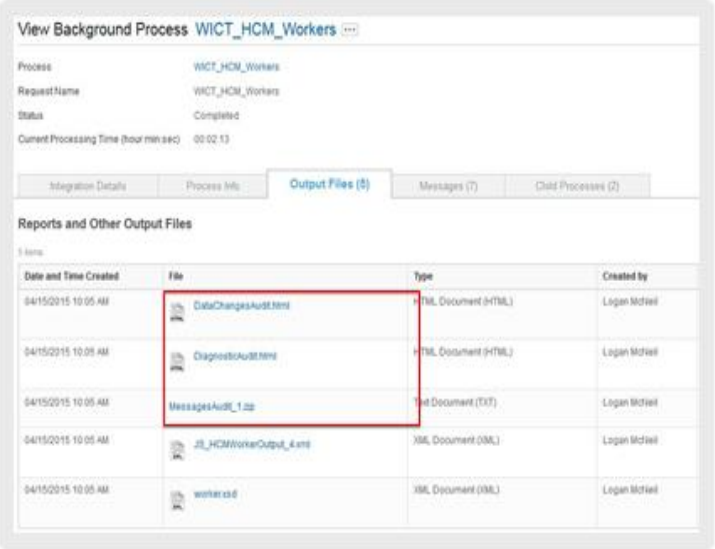
Change Detection Condition 2 Flowchart – Day 2
Disposition of each instance:
All instances still meet the Eligibility Criterion (EC) of “IsTrue”.

Jackie - Is the instance Effective Date on or after the “Last Successful Effective Date” parm but not after the “Effective Date” parm? Yes, but “No relevant changes in the worker's information were detected and so the worker has not been included in the output document” as the DiagnosticAudit file says, so not in the final output.
Andrew - Is the instance Effective Date on or after the “Last Successful Effective Date” parm but not after the “Effective Date” parm? No. The effective date is long past.
Dion - Is the instance Effective Date on or after the “Last Successful Effective Date” parm but not after the “Effective Date” parm? Yes. Is the instance entry date <= AOEM parm? Yes! - Included in output
Barry - Is the instance Effective Date on or after the “Last Successful Effective Date” parm but not after the “Effective Date” parm? No (not yet selected - will become effective on Day 3)
Neil – not tested here

How do we troubleshoot Core Connector Worker?

- ✓ Data Changes Audit
- ✓ Diagnostic Audit
- ✓ Messages Audit



Key Resources and Links

Learn On-Demand (Security)

Search for the course names in the Learning Center
- Configurable Security Overview (2 minute overview)
- Integration Security Overview (10 minutes)
- Application Security Training (7 course series)

Workday Community (Security)

Security-related Presentations from Workday's annual Professional Services conference, Altitude (recordings):
- Introduction to Configurable Security - https://community.workday.com/node/43538
- Integration Security Deep Dive - https://community.workday.com/node/62925
- Integration Security References on Community:
  - Workday Documentation: Security for Integrations - https://community.workday.com/doc/itadmin/dan1370797425079_sh-13_sh-13
  - Integration Security Cheat Sheet - https://community.workday.com/services/tools/61938
  - Integration Security – Basic https://community.workday.com/services/tools/62595
  - How to exempt ISUs from password expiration https://community.workday.com/services/tools/60494

Workday Community (General Links)

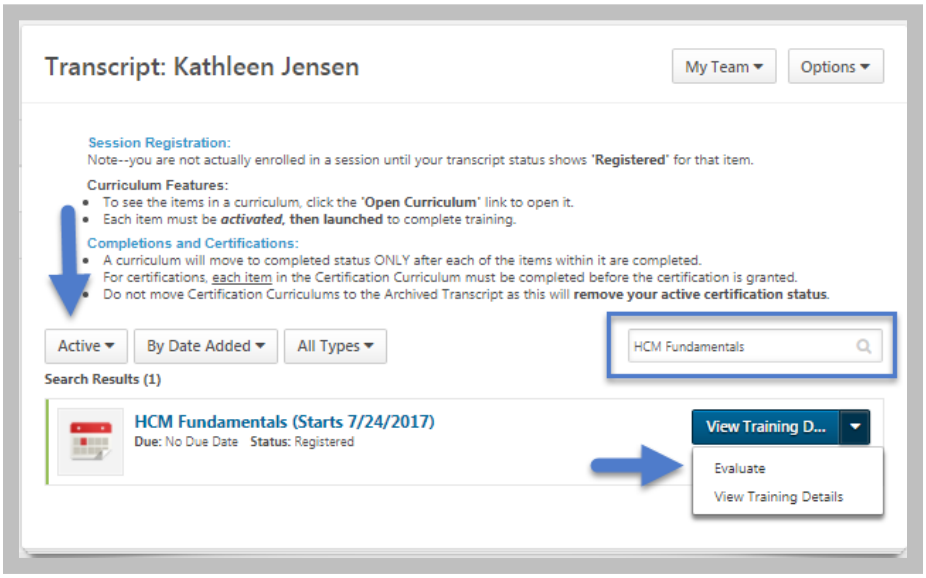
- Deployment Guide: https://community.workday.com/private/pro-services/Default.htm
- Delivery Assurance Integration Approach Review Workbook: https://community.workday.com/services/tools/85402
- Integration Approach FAQ: https://community.workday.com/services/tools/84051
- Delivery Assurance Integration Build Template: https://community.workday.com/services/tools/60055
- Glossary of Terms Acronyms for Integration Consultants: https://community.workday.com/services/tools/109469
- Issue Resolution Guide: https://community.workday.com/services/tools/88553

An Overview of Workday's Architecture:
"Exploring Workday's Architecture – Workday Engineering" at: https://medium.com/workday-engineering/exploring-workdays-architecture-73c5dbbffc35

CLASS EVALUATIONS

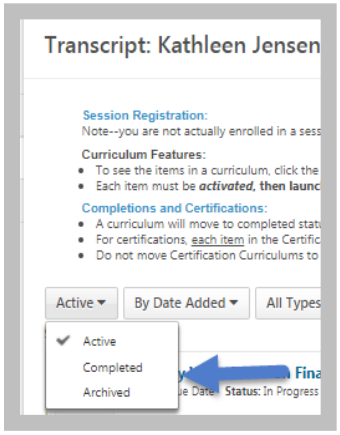
AVAILABLE AT THE START OF THE LAST DAY OF CLASS (AFTER LAST LECTURE DAY)

1. Log in to the Learning Center: https://workday.csod.com
2. Select **View Transcript**.
3. Locate the training session in your **Active** tab. (Use the search field to quickly find your training session.)
4. Click the **View Training Details** pull-down menu and select **Evaluate**.



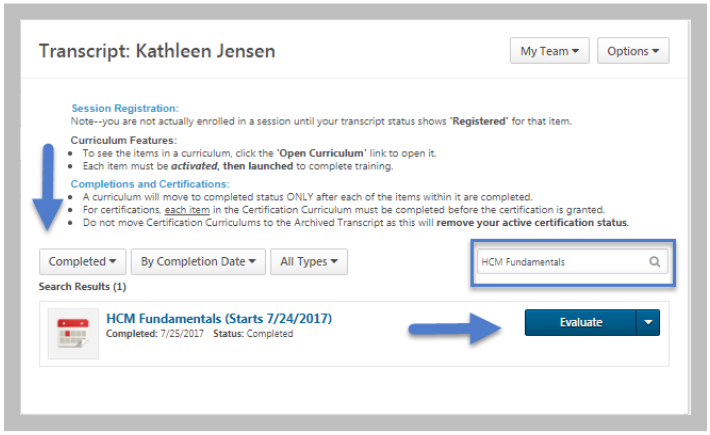
AVAILABLE AFTER CLASS ENDS AND ROSTER SUBMITTED

1. Log in to the Learning Center: https://workday.csod.com
2. Select **View Transcript**.
3. Select the **Active** tab to toggle to your **Completed** training.



4. Locate and select the completed training session. (Use the search field to quickly find your training session.)

5. Click **Evaluate**.



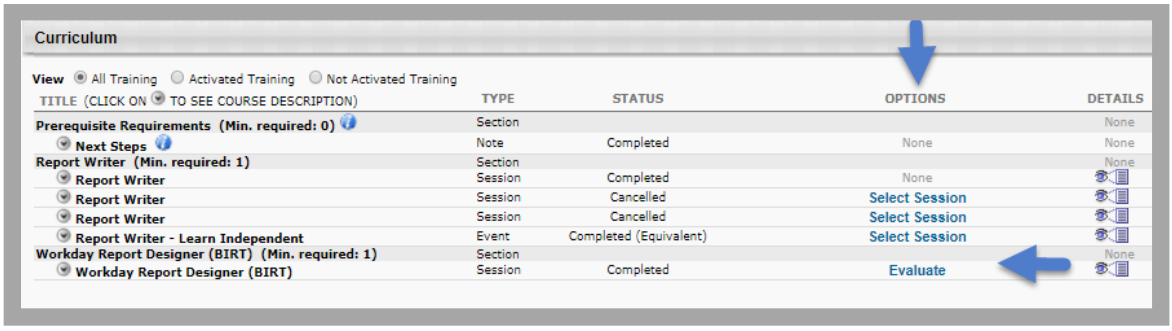
CLASS EVALUATION (SESSION WITHIN A CURRICULUM): AVAILABLE AT THE START OF THE LAST DAY OF CLASS

1. Log in to the Learning Center: https://workday.csod.com

2. Select **View Transcript**.

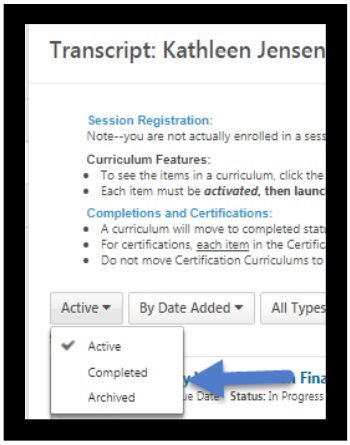
3. Locate the training session within the curriculum in your Active tab. (Use the search field to quickly find your training session and select the Curriculum Training Tile link to open the curriculum.)

4. Select **Evaluate** under the Options column.



CLASS EVALUATION (WITHIN A CURRICULUM): AVAILABLE AFTER CLASS ENDS AND ROSTER SUBMITTED

1. Log in to the Learning Center: https://workday.csod.com
2. Select **View Transcript**.
3. Select the **Active** tab to toggle to your **Completed** training.



Note: If the curriculum is still Active, meaning the curriculum requirements have not been met, the curriculum will remain on the Active tab.

4. Locate and select the completed training curriculum. Select the Training Title link to open the curriculum and locate the session. (Use the search field to quickly find your training session.)
5. Click **Evaluate**.