

# Workday Customer Configuration

Steps:

1. Search for “Create Integration System User”
2. Fill out the appropriate information
3. Set the Password and add the ISU to the section of: System Users exempt from password expiration
4. Search “Create Security Group”
5. Select “Security Group Type”
6. Name the Security Group
7. Associate the user ISU\_Gathid and select the location to constrain access to only that area
8. View Security Group and pull up the group (eg, ISSG\_Gathid\_Constrained)
9. Add the following security domains to the Integrations Permissions under Domain Security Policies permitting Get access
10. Search for “Activate Pending Security Policy Changes”
11. Create Custom Report
12. Add the fields that are needed on the report sample below.
13. Provide custom report web service URL to GathID by viewing the report definition and selecting related actions > Web Service> View URLs

## 1. Search for “Create Integration System User”

Search Results 1 items

Tasks and Reports

Create Integration System User

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Tip: try selecting another category from the left to see other results

## 2. Fill out the appropriate information

eg, User Name: ISU\_Gathid

Create Integration System User 

**Account Information**

User Name

Generate Random Password

New Password

Password Rules Your new password must not be the same as your current password or user name. Minimum number of characters required: 15. The following character types must be represented: alphabetic characters, uppercase characters, lowercase characters, Arabic numerals 0 - 9. The password must not have been used within the following number of days: 1. The password must not have been used within the following number of last passwords: 12.

New Password Verify

Require New Password at Next Sign In

Session Timeout Minutes Enforced 60

Session Timeout Minutes

Do Not Allow UI Sessions

## 3. Set the Password and add the ISU to the section of: System Users exempt from password expiration

## 4. Search “Create Security Group”

Search Results 1 items

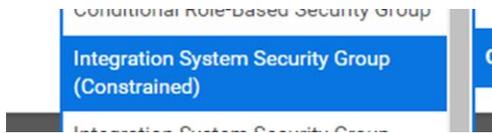
Tasks and Reports

Create Security Group

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Tip: try selecting another category from the left to see other results

## 5. Select “Security Group Type”



## 6. Name the Security Group

eg, ISSG\_Gathid\_Constrained

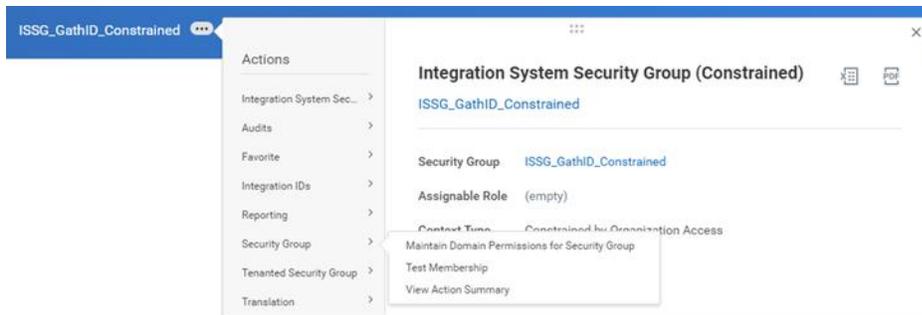
A screenshot of a 'Create Security Group' dialog box. The title bar says 'Create Security Group' with a close button (X). The form has two main fields: 'Type of Tenanted Security Group' with a dropdown menu showing 'Integration System Security Group (C...' and 'Name' with a text input field containing 'ISSG\_GathID\_Constrain'. At the bottom, there are two buttons: 'Cancel' and 'OK'.

## 7. Associate the user ISU\_Gathid and select the location to constrain access to only that area

A screenshot of the 'Edit Integration System Security Group (Constrained)' configuration page. The title bar shows the group name and ID. The form includes: 'Name' field with 'ISSG\_GathID\_Constrain'; 'Comment' field; 'Context Type' set to 'Constrained by Organization Access'; 'Inactive' checkbox; 'Group Criteria' section with 'Integration System Users' containing 'ISU\_GathID' and 'Organizations' containing 'PRA United States of America'; and 'Access Rights to Organizations' section with two radio buttons: 'Applies to Current Organization Only' (unselected) and 'Applies to Current Organization And All Subordinates' (selected).

## 8. View Security Group and pull up the group (eg, ISSG\_Gathid\_Constrained)

- Click the related actions and highlight Security
- Select Maintain Domain Permissions for Security group



## 9. Add the following security domains to the Integrations Permissions under Domain Security Policies permitting Get access

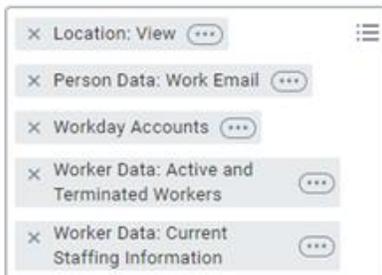
- Ensure any custom domains are added (eg, Location as per below)  
 Person Data: Work Email  
 Workday Accounts  
 Worker Data: Active and Terminated Workers  
 Worker Data: Current Staffing Information  
 Location: View

### Integration Permissions

Domain Security Policies permitting Put access



Domain Security Policies permitting Get access



## 10. Search for “Activate Pending Security Policy Changes”

Search Results 1 items

Tasks and Reports

[Activate Pending Security Policy Changes](#)

Tip: try selecting another category from the left to see other results

## 11. Create Custom Report

- Name the Report

- Report type of Advanced
- Check the Enable as a Web Service
- Select the Data Source : Workers for HCM Reporting

### Create Custom Report

Report Name \*

#### Report Details

Report Type \*

Temporary Report

Enable As Web Service

#### Data Source

Optimized for Performance

Data Source \*

Showing only Indexed Data Sources. You can unselect option "Optimized for Performance" to show all data sources.

## 12. Add the fields that are needed on the report sample below.

- Column Heading Override XML Alias is the name that will be provided from the Web Service
- Update the sharing of the report to include the Security group created (eg, ISSG\_Gathid\_Constained)
- Fields listed below are standard Workday fields with the exception of Short Description which is a company specific field that is custom
- Filter the report as needed for the group that needs to be provided

Columns			
Business Object	Field	Column Heading Override XML Alias	Format
Worker	Employee ID	Employee_ID	
Worker	Worker	worker	
Worker	Legal Full Name	fullLegalName	
Worker	Legal First Name	firstLegalName	
Worker	Legal Last Name	lastLegalName	
Worker	Preferred Full Name	fullPrefName	
Worker	Preferred First Name	firstPrefName	
Worker	Preferred Last Name	lastPrefName	
Worker	User Name	userName	
Worker	Active Status	activeStatus	
Worker	Termination Date - All	termDate	
Worker	Manager - Level 01	manager	
Worker	Job Title	title	
Worker	Job Code	jobCode	
Worker	Email - Primary Work	emailWork	
Location	Location Name	locName	
Location	Short Description	shortDesc	
Worker	Division	department	
Worker	Worker Type	workerType	

Group Column Headings	
Business Object	Group Column Heading XML Alias
Location	location

**13. Provide custom report web service URL to GathID by viewing the report definition and selecting related actions > Web Service> View URLs**

The screenshot shows the 'Custom Report' configuration interface in GathID. On the left, a navigation menu is visible with 'Report' selected. The main content area displays the following details for the 'GathID' report:

- Brief Description:** (empty)
- Data Source:** Workers for HCM Reporting
- Primary Business Object:** Worker