



## Workday Integration Setup

## Introduction:

It's now possible to sync user information displayed in Simpplr from Workday. Workday provides updated user information through rest api. Sample report format accepted by Simpplr is specified in Appendix A at the end of document.

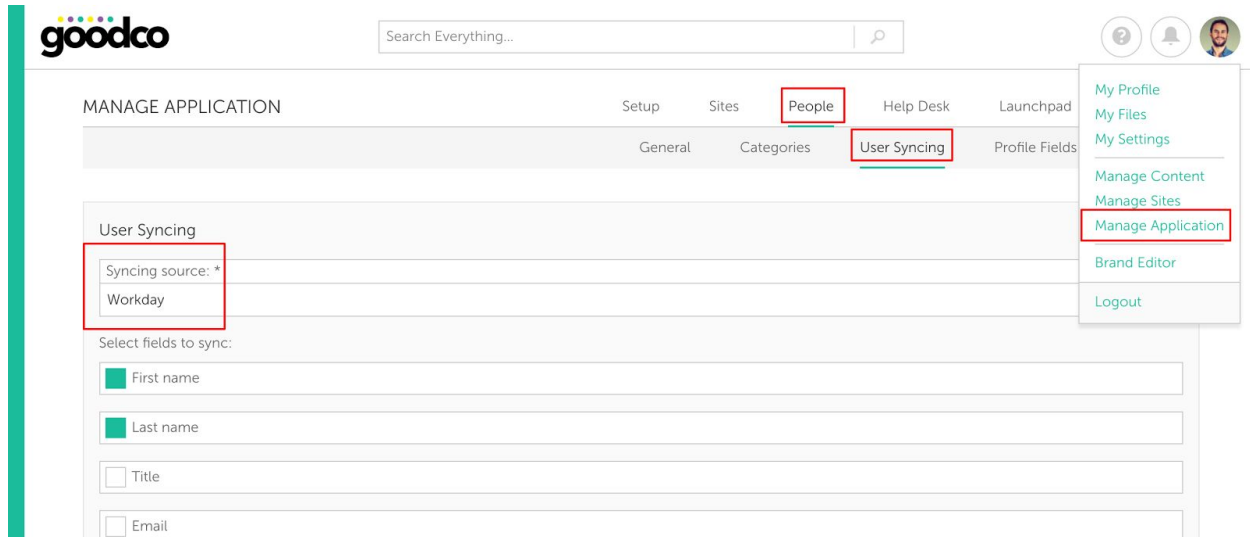
You will need to create the report in Workday, expose it as web service so Simpplr can retrieve it. In the process of creating the report, you will be asked to create a username and password. You will enter the credential in "Manage" > "Integrations".

## Steps to configure Workday integration

Step 1: Click on your avatar at the upper right hand corner, go to "Manage Application" > "Integrations". Select "Workday" and enter your Workday credentials. Click "Save" when you are done.

The screenshot displays the GoodCo user interface for managing applications. At the top, there is a search bar and navigation icons. The main header shows 'MANAGE APPLICATION' with tabs for Setup, Sites, People, Help Desk, Launchpad, and Integrations. The 'Integrations' tab is active and highlighted with a red box. Below this, a list of integrations is shown, each with a checkbox. The 'Workday' integration is selected, and its configuration form is expanded. This form includes fields for 'Workday username: \*', 'Workday password: \*', 'Workday confirm password: \*', and 'Workday endpoint URL: \*'. A 'Save' button is located at the bottom right of the form. The footer contains a feedback link, terms of service, privacy policy, and copyright information.

Step 2: Click on your avatar at the upper right hand corner, go to “Manage Application” > “People” > “User Syncing” tab. Select “Workday” in the “Syncing Source” field and select fields to sync with Workday. Click “Save”.



Step 3: Add Workday Endpoint URL added in Step 1 to “Remote Site settings” in Salesforce. Only base URL needs to be added.

E.g. If Workday Url is <https://simpplr.workday.com/api>, you will add <https://simpplr.workday.com> in remote site settings

To Add, Go Salesforce -> Setup -> Remote Site Settings, Click on Add, and add required details and click Save.

#### Remote Site Edit

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Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.

The screenshot shows the 'Remote Site Edit' form in Salesforce. At the top, there are buttons for 'Save', 'Save & New', and 'Cancel'. The form fields are: 'Remote Site Name' with the value 'WorkdayAPI', 'Remote Site URL' with the value 'https://simpplr.herokuapp.com', 'Disable Protocol Security' with a checked checkbox, and a 'Description' text area. At the bottom, there is an 'Active' checkbox which is also checked. At the very bottom, there are buttons for 'Save', 'Save & New', and 'Cancel'.

Step 4: Go to Simpplr, go to “Manage Application” > “Setup” > “Schedulers” > “SchedulerUserDataSync”. Click on the drop down arrow and select “Run Now” to pull Workday user information immediately.

Click the "Schedule" button to schedule night job to pull information from Workday on daily basis.

The screenshot shows the Goodco application management interface. The top navigation bar includes 'MANAGE APPLICATION' with sub-tabs for 'Setup', 'Sites', 'People', 'Help Desk', 'Launchpad', and 'Integrations'. Below this, there are more sub-tabs: 'General', 'Governance', 'Dashboard', 'Navigation', 'Storage', 'Email', 'Analytics', 'Schedulers', and 'Troubleshooting'. The 'Schedulers' tab is active and highlighted. A table lists scheduled jobs with columns for 'NAME', 'LAST RUN', 'NEXT RUN', and 'OPTIONS'. The 'SchedulerUserDataSync' job is highlighted with a red box. A 'Run Now' button is visible next to it, also highlighted with a red box. The 'Run Now' button has a dropdown menu with 'Run Now' and 'Clear Schedule' options.

| NAME                                   | LAST RUN                | NEXT RUN                | OPTIONS   |
|--|-------------------------|-------------------------|---|
| SchedulerBatchAddUsersToMandatorySites | N/A                     | N/A                     | <input type="checkbox"/> <input type="checkbox"/> |
| SchedulerBatchInsertPeopleRecords      | Apr 8, 2016 at 12:05 AM | Apr 9, 2016 at 12:05 AM | <input type="checkbox"/> <input type="checkbox"/> |
| SchedulerUserDataSync                  | Apr 8, 2016 at 12:00 AM | Apr 9, 2016 at 12:00 AM | <input type="checkbox"/> <input type="checkbox"/> |

#### Notes:

1. If Employee Number fields is selected for sync, employee numbers will be updated for those users whose employee number is not yet set in Simpplr. Email address is used for matching corresponding user in Simpplr. If more than one users have same email address in Simpplr, all such records will be updated with employee number coming from Workday..
2. Simpplr uses Employee Number coming from Workday to find corresponding user in Simpplr. All fields selected for sync will be updated with corresponding values received from workday API.
3. All fields selected to sync from WorkDay will not be editable in Simpplr.

We log updated records in backend logs.

You can check the sync status of any particular day through developer console (under Salesforce Setup > Developer Console).

You can run the following query to determine to find which records are updated:

```
select id, simpplr__Log_Data__c, createddate from Simpplr__logs__c where simpplr__Log_Type__c='WORKDAY_SYNC' and createddate =today
```

| Query Results - Total Rows: 8 |   |                              |
|-------------------------------|---|------------------------------|
| Id                            | Simplr_Log_Data__c  | CreatedDate                  |
| a0263000000HyvqEAC            | Successfully updated EmployeeNumber for userId - 00563000000IcmwAAC | 2016-08-03T12:30:30.000+0000 |
| a0263000000HyvrEAC            | Successfully updated EmployeeNumber for userId - 00563000000KOF7AA4 | 2016-08-03T12:30:30.000+0000 |
| a0263000000HyvsEAC            | Successfully updated EmployeeNumber for userId - 00563000000K0J6AA0 | 2016-08-03T12:30:30.000+0000 |
| a0263000000HyvtEAC            | Successfully updated EmployeeNumber for userId - 00563000000KQwAAG  | 2016-08-03T12:30:30.000+0000 |
| a0263000000HyvuEAC            | Successfully updated EmployeeNumber for userId - 00563000000Kfn8AAC | 2016-08-03T12:30:30.000+0000 |
| a0263000000HyvvEAC            | Successfully updated People__c for userId - 00563000000Kfn8AAC      | 2016-08-03T12:30:30.000+0000 |
| a0263000000I0zoEAC            | No Employee Number found to be updated in People__c.                | 2016-08-03T17:14:50.000+0000 |
| a0263000000I0zpEAC            | No records found to be updated in People__c.                        | 2016-08-03T17:14:50.000+0000 |

After initial Employee Number sync on day 1, we are not expecting employee number getting changed for users.

Records are updated in 2 steps, so you will find 2 type of logs.

1. Records whose Employee numbers are updated (If email address matches, employee number updated in database)
2. Records whose Information is updated (If Employee number matches).

Information is updated only when the information in Simplr is different, so logging is done only for those records whose information is different, otherwise, logs will tell no information updated for these 2 type of logs.

In the log:

1. List of users whose employee numbers get updated are listed first, followed by list of users whose information is updated.
2. If everything was already in sync, no information was updated.

## Appendix A:

Sample JSON response accepted by Simpplr is as follows:

```
{
  "Report_Entry": [
    {
      "EmployeeID": "100",
      "FirstName": "Ryan",
      "LastName": "Taylor",
      "Role": "CEO",
      "HireDate": "2011-06-06",
      "AboutMe": "Nice bio coming soon.",
      "BirthDate": "1978-08-12",
      "BusinessTitle": "CEO",
      "ManagerID": "",
      "Manager": "",
      "Department": "Corporate",
      "Division": "Corporate",
      "WorkAddressFormattedLine1": "1650 Castro Street",
      "WorkAddressFormattedLine2": "Suite 221",
      "WorkAddressCity": "Mountain View",
      "WorkAddressStateProvince": "California",
      "WorkAddressPostalCode": "94041",
      "WorkAddressCountry": "United States of America",
      "PrimaryWorkEmail": "simpplr.dev+ryan.taylor@gmail.com",
      "PublicWorkPhones": "9565550401",
      "PublicWorkMobilePhones": "9565550501",
      "NickName": "rtaylor",
      "CompanyName": "GoodCo Inc.",
      "Extension": "101",
      "Fax": "8765550700",
      "CurrentMomentDateTime": "2015-08-12T19:56:54.871-07:00"
    },
    {
      "EmployeeID": "105",
      "FirstName": "Jennifer",
      "LastName": "Whitman",
      "Role": "Director",
      "HireDate": "2012-07-07",
      "AboutMe": "Nice bio for Jennifer Whitman coming soon.",
      "BirthDate": "1980-06-10",
      "BusinessTitle": "Director, Human Resources",
      "ManagerID": "100",
      "Manager": "Ryan Taylor",
      "Department": "Human Resources",
      "Division": "Corporate",
    }
  ]
}
```

```
"WorkAddressFormattedLine1": "1650 Castro Street",
"WorkAddressFormattedLine2": "Suite 221",
"WorkAddressCity": "Mountain View",
"WorkAddressStateProvince": "California",
"WorkAddressPostalCode": "94041",
"WorkAddressCountry": "United States of America",
"PrimaryWorkEmail": "simpplr.dev+jennifer.whitman@gmail.com",
"PublicWorkPhones": "9565550402",
"PublicWorkMobilePhones": "9565550502",
"NickName": "jwhitman",
"CompanyName": "GoodCo Inc.",
"Extension": "102",
"Fax": "8765550701",
"CurrentMomentDateTime": "2015-08-12T19:56:54.871-07:00"
},
{
  "EmployeeID": "110",
  "FirstName": "Troy",
  "LastName": "Miller",
  "Role": "Employee Communications Manager",
  "HireDate": "2013-08-08",
  "AboutMe": "The master of all things sales, marketing, HR and ops at Goodco. Interests: Boating,
cats",
  "BirthDate": "1984-03-04",
  "BusinessTitle": "Employee Communications Manager",
  "ManagerID": "105",
  "Manager": "Jennifer Whitman",
  "Department": "Human Resources",
  "Division": "Corporate",
  "WorkAddressFormattedLine1": "1650 Castro Street",
  "WorkAddressFormattedLine2": "Suite 221",
  "WorkAddressCity": "Mountain View",
  "WorkAddressStateProvince": "California",
  "WorkAddressPostalCode": "94041",
  "WorkAddressCountry": "United States of America",
  "PrimaryWorkEmail": "simpplr.dev+troy.miller@gmail.com",
  "PublicWorkPhones": "9565550403",
  "PublicWorkMobilePhones": "9565550503",
  "NickName": "tmiller",
  "CompanyName": "GoodCo Inc.",
  "Extension": "103",
  "Fax": "8765550702",
  "CurrentMomentDateTime": "2015-08-12T19:56:54.871-07:00"
},
{
  "EmployeeID": "112",
  "FirstName": "Nicole",
  "LastName": "Kramer",
```

```
"Role": "Senior HR Manager",
"HireDate": "2013-08-08",
>AboutMe": "Nice bio about Nicole Kramer coming soon.",
"BirthDate": "1981-11-21",
"BusinessTitle": "Senior HR Manager",
"ManagerID": "105",
"Manager": "Jennifer Whitman",
"Department": "Human Resources",
"Division": "Corporate",
"WorkAddressFormattedLine1": "1650 Castro Street",
"WorkAddressFormattedLine2": "Suite 221",
"WorkAddressCity": "Mountain View",
"WorkAddressStateProvince": "California",
"WorkAddressPostalCode": "94041",
"WorkAddressCountry": "United States of America",
"PrimaryWorkEmail": "simpplr.dev+nicole.kramer@gmail.com",
"PublicWorkPhones": "9565550404",
"PublicWorkMobilePhones": "9565550504",
"NickName": "nkramer",
"CompanyName": "GoodCo Inc.",
"Extension": "104",
"Fax": "8765550703",
"CurrentMomentDateTime": "2015-08-12T19:56:54.871-07:00"
},
{
"EmployeeID": "114",
"FirstName": "Erika",
"LastName": "Kane",
"Role": "VP",
"HireDate": "2014-03-01",
>AboutMe": "Nice bio for Jennifer Whitman coming soon.",
"BirthDate": "1980-02-09",
"BusinessTitle": "VP, Customer Success",
"ManagerID": "100",
"Manager": "Ryan Taylor",
"Department": "Customer Success",
"Division": "Corporate",
"WorkAddressFormattedLine1": "1650 Castro Street",
"WorkAddressFormattedLine2": "Suite 221",
"WorkAddressCity": "Mountain View",
"WorkAddressStateProvince": "California",
"WorkAddressPostalCode": "94041",
"WorkAddressCountry": "United States of America",
"PrimaryWorkEmail": "simpplr.dev+eikra.kane@gmail.com",
"PublicWorkPhones": "9565550405",
"PublicWorkMobilePhones": "9565550505",
"NickName": "ekane",
"CompanyName": "GoodCo Inc.",
```



```
"Extension": "105",
"Fax": "8765550704",
"CurrentMomentDateTime": "2015-08-12T19:56:54.871-07:00"
},
{
  "EmployeeID": "115",
  "FirstName": "Sydnee",
  "LastName": "Walker",
  "Role": "Manager",
  "HireDate": "2012-07-17",
  "AboutMe": "Nice bio for Sydnee Walker coming soon.",
  "BirthDate": "1980-02-09",
  "BusinessTitle": "Manager, Customer Success",
  "ManagerID": "114",
  "Manager": "Erika Kane",
  "Department": "Customer Success",
  "Division": "Corporate",
  "WorkAddressFormattedLine1": "1650 Castro Street",
  "WorkAddressFormattedLine2": "Suite 221",
  "WorkAddressCity": "Mountain View",
  "WorkAddressStateProvince": "California",
  "WorkAddressPostalCode": "94041",
  "WorkAddressCountry": "United States of America",
  "PrimaryWorkEmail": "simpplr.dev+sydnee.walker@gmail.com",
  "PublicWorkPhones": "9565550406",
  "PublicWorkMobilePhones": "9565550506",
  "NickName": "swalker",
  "CompanyName": "GoodCo Inc.",
  "Extension": "106",
  "Fax": "8765550705",
  "CurrentMomentDateTime": "2015-08-12T19:56:54.871-07:00"
},
{
  "EmployeeID": "116",
  "FirstName": "Robert",
  "LastName": "Hawkins",
  "Role": "Manager",
  "HireDate": "2012-05-07",
  "AboutMe": "Nice bio for Robert Hawkins coming soon.",
  "BirthDate": "1983-12-19",
  "BusinessTitle": "Tech Support Specialist",
  "ManagerID": "115",
  "Manager": "Sydnee Walker",
  "Department": "Customer Success",
  "Division": "Corporate",
  "WorkAddressFormattedLine1": "1650 Castro Street",
  "WorkAddressFormattedLine2": "Suite 221",
  "WorkAddressCity": "Mountain View",
```

```
"WorkAddressStateProvince": "California",
"WorkAddressPostalCode": "94041",
"WorkAddressCountry": "United States of America",
"PrimaryWorkEmail": "simpplr.dev+robert.hawkins@gmail.com",
"PublicWorkPhones": "9565550407",
"PublicWorkMobilePhones": "9565550507",
"NickName": "swalker",
"CompanyName": "GoodCo Inc.",
"Extension": "107",
"Fax": "8765550706",
"CurrentMomentDateTime": "2015-08-12T19:56:54.871-07:00"
}
]
}
```