cornerstone

Workday Core Data Inbound Integration

Edge Integration Guide

Table of contents

Overview 3
Prerequisites 3
Considerations 4
Enablement 5
Enablement in Workday 5
Configuring field override service & eligibility criteria 10
Step 1: Creating Integration Field Override Service 10
Step 2: Creating Integration System 11
Enablement in Cornerstone 16
Modes of Synchronization 23
Scheduled Sync 23
On demand Sync 23
Delta sync 23
Full Sync 24
Organizational Unit Sync 24
User Sync 25
APPENDIX 27
Creating an Employee type Custom OU 27
Creating a Custom Field on a User Record 31
OU Mapping 32
Division & Grade & Cost Center OU 33
Position OU 33
Location OU 33
Custom OUs 34
USER MAPPING 34
FAQ 36
Support 37

Version history

	DATE	DESCRIPTION
1.0	Jun 11, 2018	Document creation (Closed Beta)
2.0	Aug 6, 2018	• Updating the User mapping fields • Updating Enablement In Workday information • Removing Pre-requisites and adding its content in Appendix
3.0	Sep 17, 2018	• Document creation (GA)
3.1	Sep 25, 2018	• Moved portions in the Appendix to Enablement
4.0	Dec 14, 2018	• Added Support details of Custom Text fields on a user record • Added Eligibility Criteria Support • Added more details on how to configure Employe Type Custom OU
5.0	March 11, 2019	• Enhancement details added to the CSOD Edge settings page. • Added steps to create a Custom short text field on a user record • Updated User Mapping fields
6.0	Sep 14, 2019	• Updates to Enablement in Cornerstone
7.0	April 12, 2020	• Updated the following sections: Consideration, Enablement in Cornerstone, Modes of Synchronization, User Mapping, FAQ
8.0	April 23, 2020	• Enablement in Cornerstone > New Hires Sync Time • Enablement in Cornerstone > Security Role • User Mapping > added comment in User ID
9.0	May 19, 2020	• Updated Considerations list > Added Legal Entity OU • Updated Enablement in Workday > Step #5 > Domain Security Policy > Removed Person Data: Ethnicity and Person Data: Gender
10.0	Jun 26, 2020	• Updated Considerations section
11.0	Oct 13, 2020	• Updated the following sections: – Enablement in Cornerstone > New Hires Sync Time – Enablement in Cornerstone > OU Mapping – Enablement in Cornerstone > Include in Sync – User Sync
12.0	Jan 28, 2020	• Updated the following sections: – Considerations – Modes of Synchronization
13.0	October 2023	– Updated Considerations list – Updated Enablement in Cornerstone

Overview

Cornerstone's Edge-ready Workday Core Data Inbound Integration creates and updates user and organizational unit (OU) records in Cornerstone. This is a one-way integration from Workday (via APIs v29.2) to Cornerstone. This integration will allow user and OU management to be centralized in Workday.

The integration supports the following functionalities:

- One-way transfer of OUs and users from Workday to Cornerstone
- Nightly synchronization of OU and user records
- Ability to trigger the integration on-demand
- Map Workday organization types to Cornerstone standard
- and custom OUs
- Define the hierarchy for standard OUs
- Provide integration summary and logs for user and OU syncs via email
- Cornerstone user custom fields
- Distinguish user record between a contingent worker and an employee via a custom OU
- Summary and log of synced OUs and users via email notification

Prerequisites

- Workday HR system
- Any Cornerstone Suite
- Workday-certified admin to configure the enablement in Workday. Cornerstone will not consult on Workday-related configuration.

Considerations

- The integration runs nightly at a pre-defined schedule for both OU and user sync. The schedule cannot be modified. See Modes of Synchronization section for details.
- The integration can only run once (scheduled or on-demand) within a 3-hour period AND if no other sync (user or OU) is currently running.
- The mapping of Location and Position OUs are predefined and built into the integration. These cannot be modified or deleted.
- The Position OU hierarchy is predefined and built into the integration. These cannot be modified or deleted.
- Workday standard or custom user/worker fields (e.g. Management Level, Compensation/Grade) cannot be mapped to OUs. Only Workday organization types can be mapped to Cornerstone OUs.
- User, OUs, and OU hierarchy (if applicable) will be brought over from Workday as configured in Workday. Workday is the source of record. Thus, manual changes to the user, OU, and/or hierarchy in Cornerstone will be overwritten as set in Workday after each sync.
- The integration does not support OU custom fields.
- The integration does not support setting hierarchy for custom OUs.
- The integration only supports user custom fields that are of short text box type.
- The integration does not support sending the user's Cornerstone-generated Global Unique Identifier (GUID) number to Workday. Special considerations should be given for Cornerstone Recruiting clients. Please consult with your Cornerstone Account Manager or Solution Architect.
- The integration does not support secure custom fields.
- The integration does not support Legal Entity OU.
- The integration does not support Termination-related fields.
- The integration does not support blank override.
- The integration does not support enhanced auditing (User Record Auditing) and is, therefore, not recommended for GxP customers.

Please consult with your Account Manager should you need a custom solution to meet your business requirements.

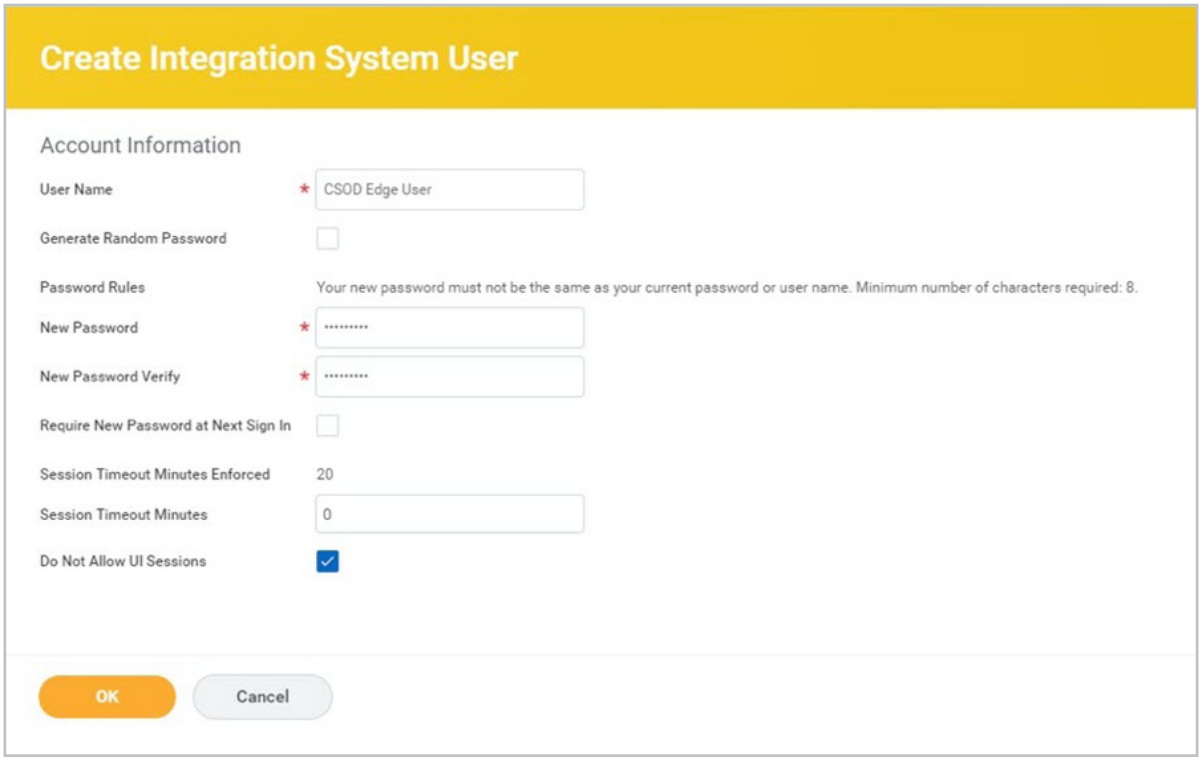
Enablement

A Workday Administrator account with the appropriate permissions is required to configure and enable the integration.

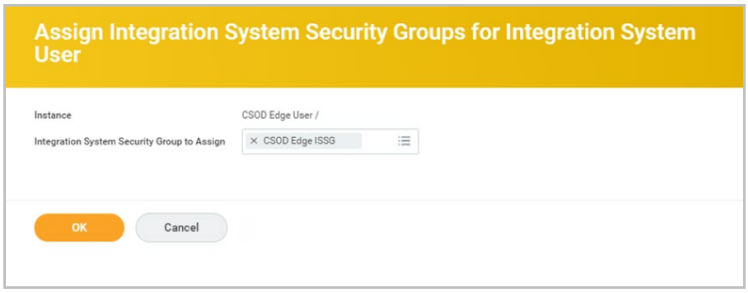
It is recommended to implement the integration on your test environment prior to production environment. Follow the steps below to configure and enable the integration.

Enablement in Workday

1. Log in to Workday.
2. Create an Integration System User (ISU) to be used for the integration.
   Note the User Name and Password values as these are required to set up the integration on the Edge Settings page in Cornerstone.

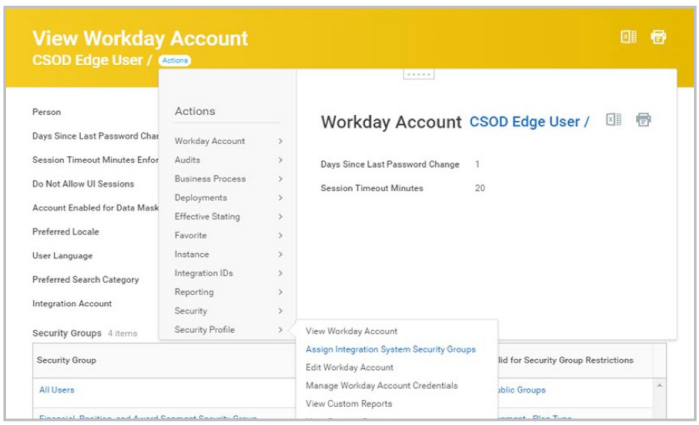


3. Create Integration System Security Group that will be used to manage the permissions needed for the integration.

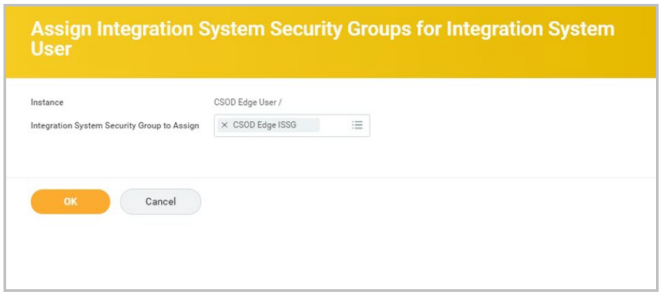


4. Add the integration system user to the security group by:

   a. Select Actions > Security Profile > Assign Integration System Security Group.



   b. Add ISU to System Security group.



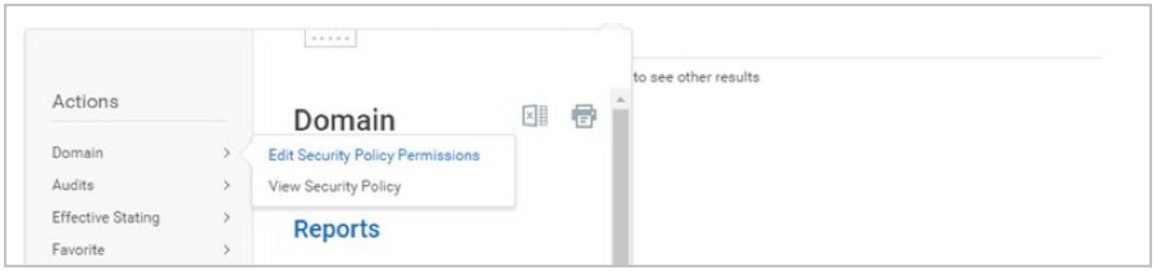
5. Add permission for the security group in the following Domain Security Policy Permissions:

OPERATION	DOMAIN SECURITY POLICY	INHERITING PERMISSION	FUNCTIONAL AREAS
Get Only	Manage: Location	Location: View	Organizations and Roles
Get Only	Manage: Organization Integration		Organizations and Roles
Get Only	Job Information		Jobs & Positions
Get Only	Worker Data: Public Worker		Staffing
Get Only	Worker Data: Current Staffing		Staffing
Get Only	Worker Data: Current Job Profile Information		Staffing
Get Only	Worker Data: Current Management Level Information		Staffing

This can be done by the following steps:

a. Search for each of the required security domains.

b. Select Actions > Domain > Edit Security Policy Permission.



c. Add the permissions for the security group as shown below:

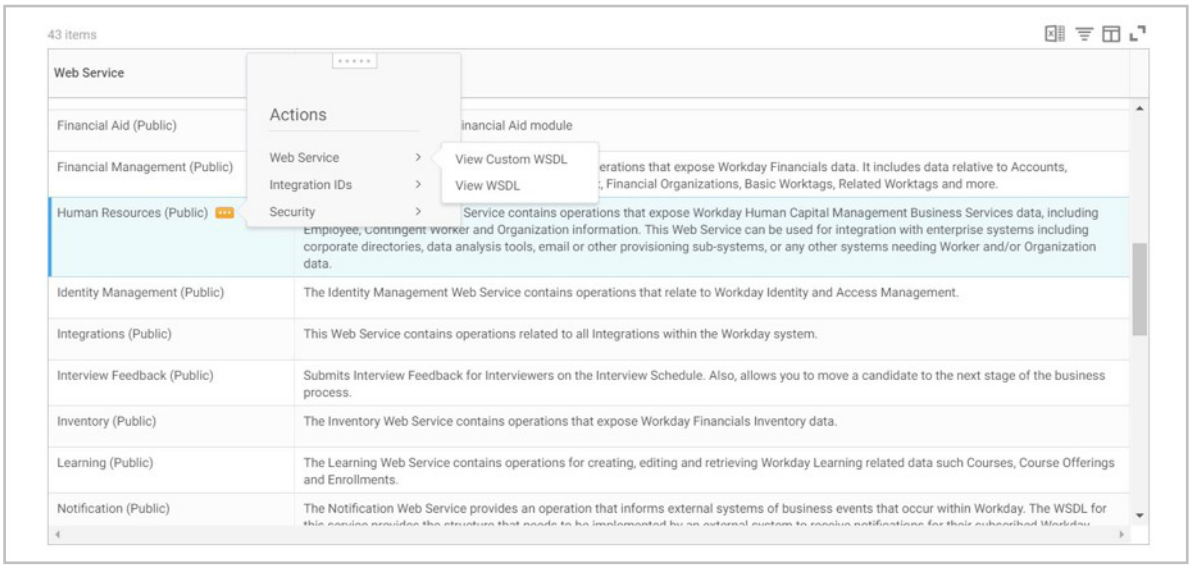
6. Activate your security changes.
7. Identify Workday's Tenant URL by following the below steps:

    a. Log in to Workday.

    b. Search for Public Web Services.

    c. Select Public Web Services.

    d. Select "View WSDL" under Human resources (Public) > Actions > Web Service.



    e. Search for "address location".

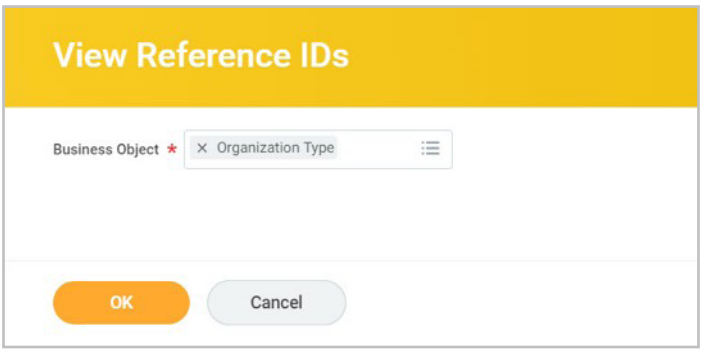
f. Note the tenant URL highlighted above in the "soapbind" tag. It should be in the following format: *https://<DataCenter>.workday.com/ccx/services/<tenant_portal_name>*. You will need this URL when setting up the integration in Cornerstone on the Edge Settings page.

Note: You may have multiple Workday tenant environments (sandbox, implementation and/or production).

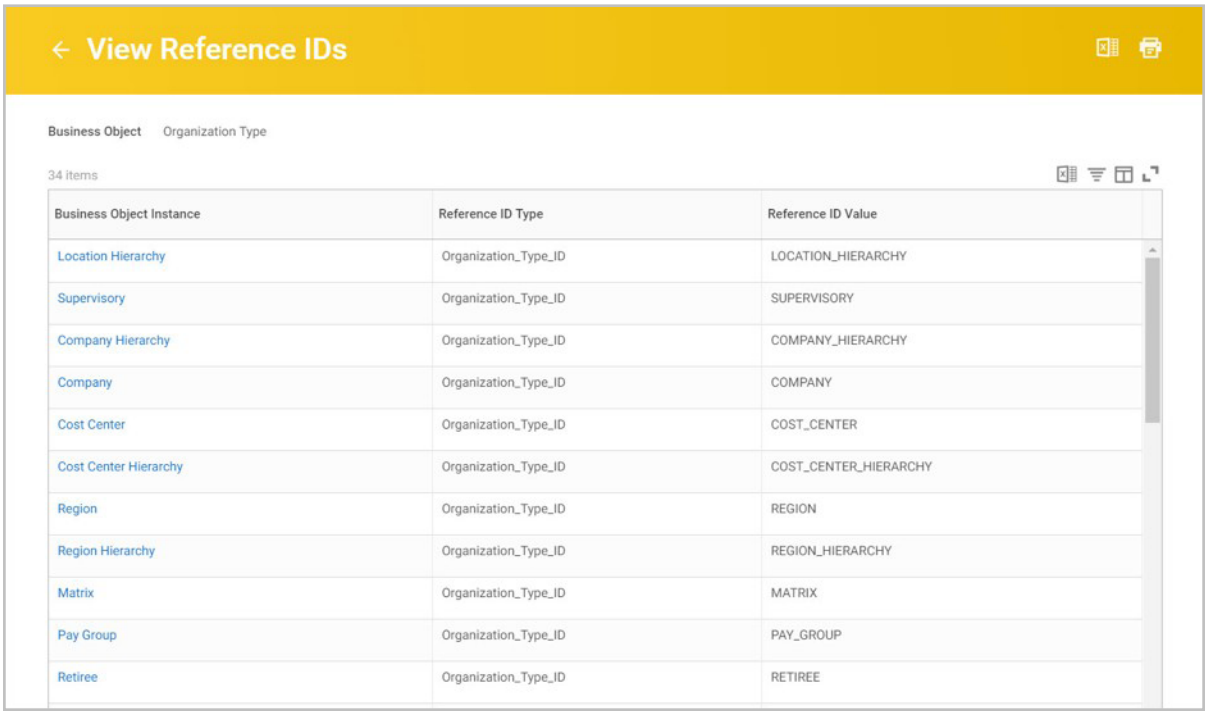
8. Identify the Organization Types you want transferred to from Workday to Cornerstone.
9. Obtain the corresponding Reference ID Value for the identified Organization Types. This can be done by the following steps:

    a. Search for View Reference IDs.

    b. Set Organization Type as the Business Object.



    c. Select OK to display the Organization Types and their Reference ID Value.



Business Object Instance	Reference ID Type	Reference ID Value
Location Hierarchy	Organization_Type_ID	LOCATION_HIERARCHY
Supervisory	Organization_Type_ID	SUPERVISORY
Company Hierarchy	Organization_Type_ID	COMPANY_HIERARCHY
Company	Organization_Type_ID	COMPANY
Cost Center	Organization_Type_ID	COST_CENTER
Cost Center Hierarchy	Organization_Type_ID	COST_CENTER_HIERARCHY
Region	Organization_Type_ID	REGION
Region Hierarchy	Organization_Type_ID	REGION_HIERARCHY
Matrix	Organization_Type_ID	MATRIX
Pay Group	Organization_Type_ID	PAY_GROUP
Retiree	Organization_Type_ID	RETIREE

    d. Note the organization type Reference ID values for OUs that will be synced in Cornerstone. You will enter these Reference IDs when setting up the integration in Cornerstone on the Edge Settings page. The followiong table shows examples of organization type Reference IDs from the screenshot above.

Workday Org. Type	Workday Org. Type Ref ID Value
Cost Center Hierarchy	COST_CENTER_HIERARCHY
Supervisory	SUPERVISORY
Cost Center	COST_CENTER

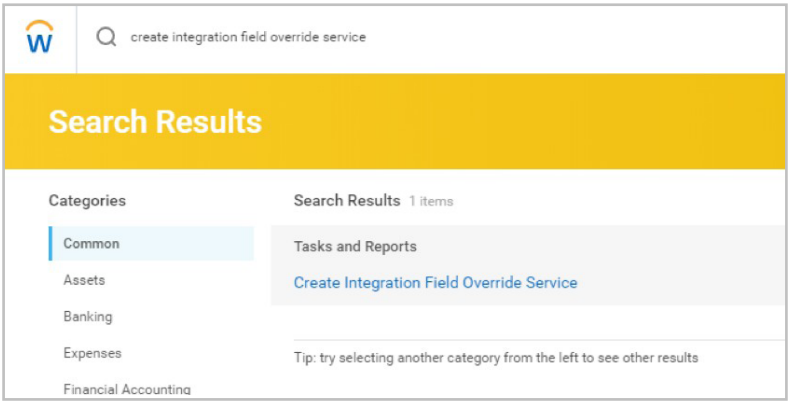
Configuring field override service & eligibility criteria

This configuration is required to support any of the following use cases:

- Limit the user population that is transferred from Workday to Cornerstone
- Assign an approver to users in Cornerstone
- Capture the tussenvoegsel portion of a user's name in Cornerstone
- Capture a user's non-English (e.g. Chinese) name when a user has both English and non-English names
- Map Workday fields to Cornerstone user custom fields

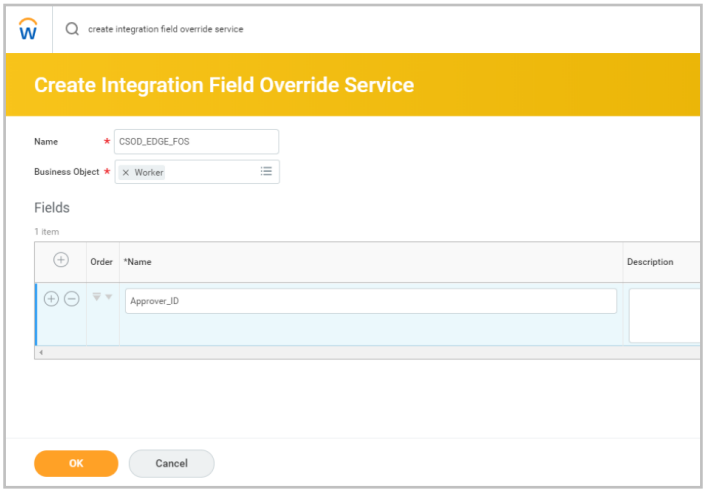
Step 1: Creating Integration Field Override Service

1. In Workday, search for Create integration field override service and select it from the search results.



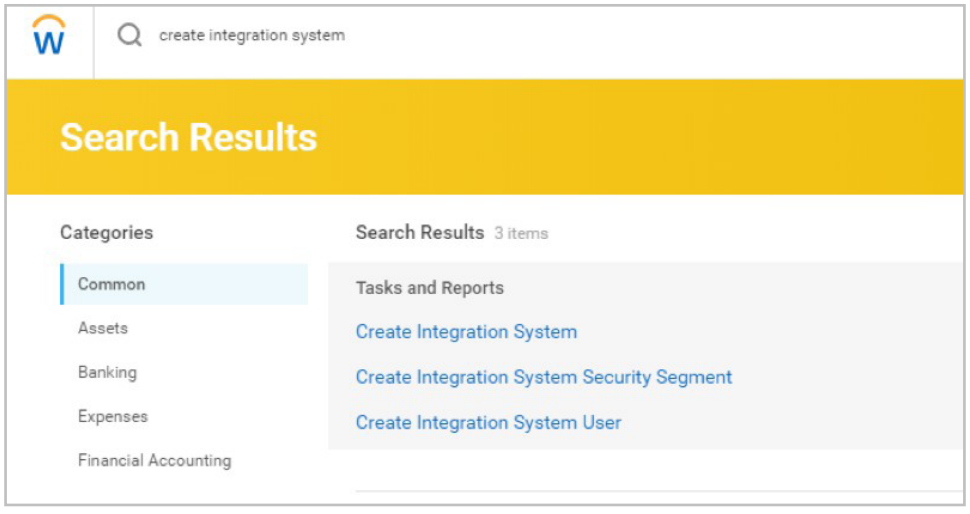
2. Populate the Name and set the Business Object to Worker.

3. Add the Fields and select OK. For illustration purposes, we will use the Approver use case. In this example, “Approver_ID” has been added. Note this value as you will enter it in Cornerstone when setting up the Override Field Mapping section on the Edge Settings page.



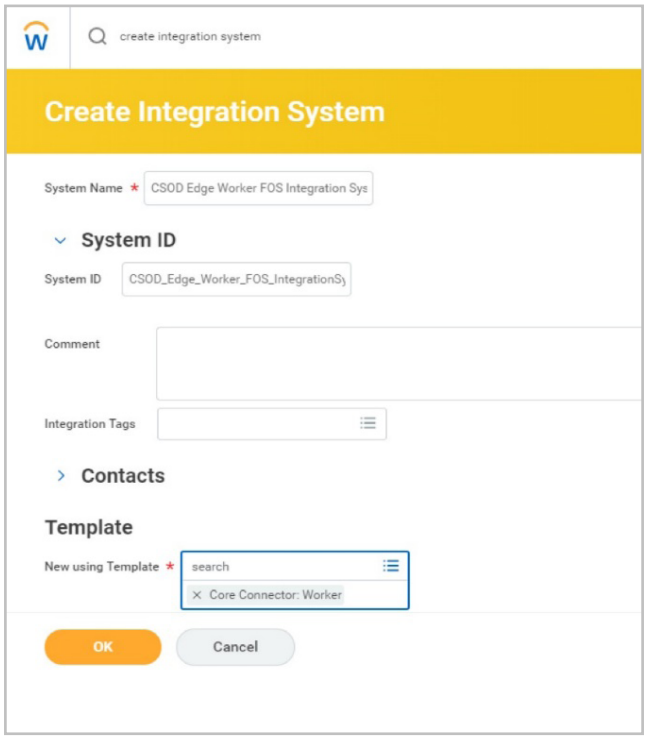
Step 2: Creating Integration System

1. Search for “Create Integration System” and select it from the search results.



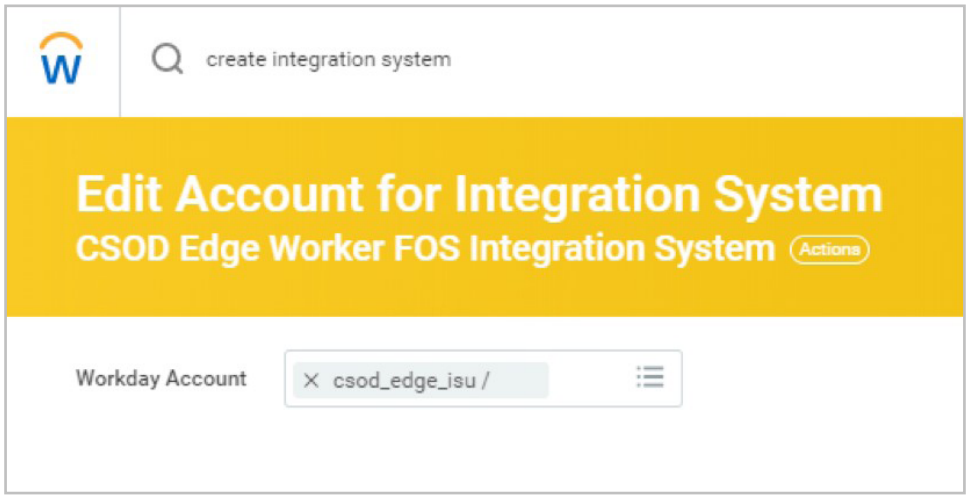
Note: Although the integration system will use the Core Connector: Worker template, the integration itself will never be executed. All non-essential integration services will be disabled and the field override service will be added as a custom service.

2. Enter values in System Name, System ID and set New using Template to “Core Connector: Worker”.

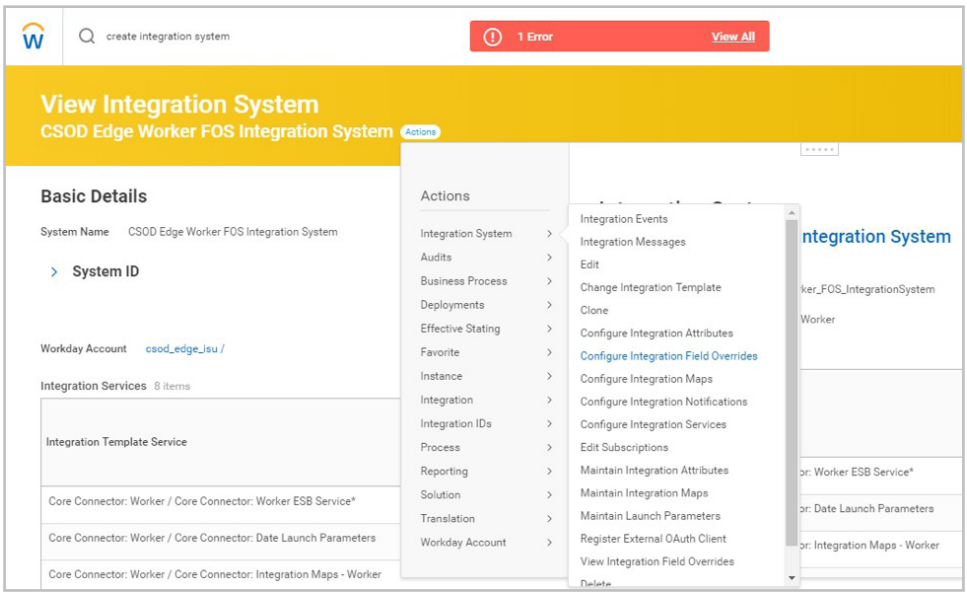


It is recommended to use the same System ID if you are setting up for multiple field overrides.

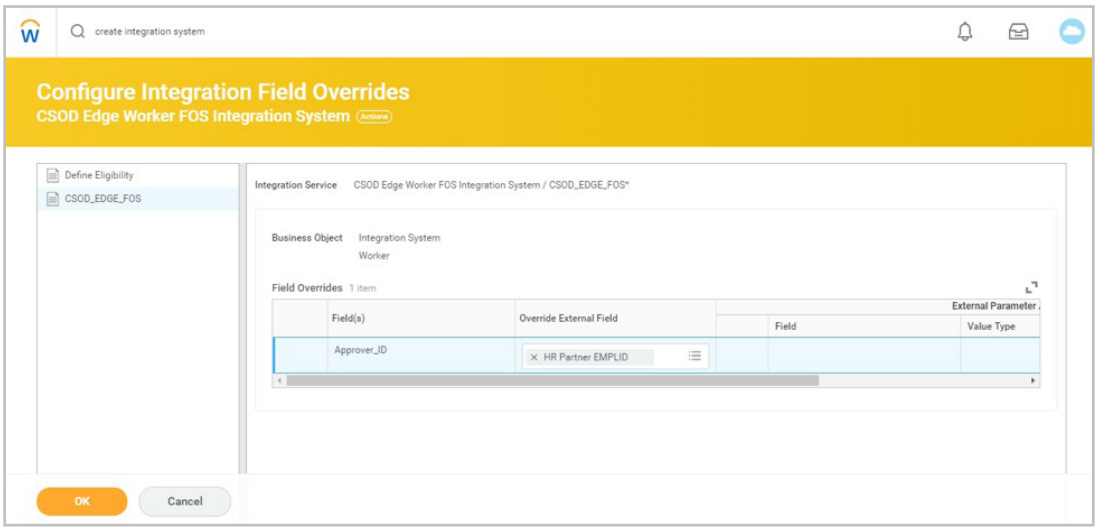
3. Add the Edge Integration System user as the Workday Account for the Integration System.



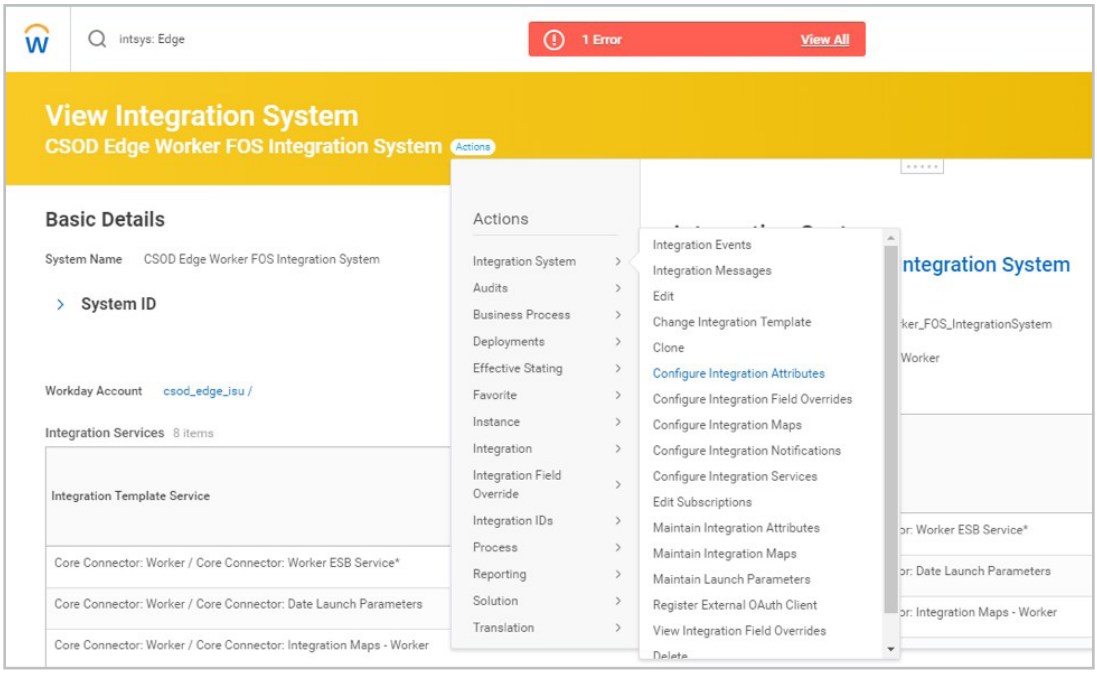
4. Navigate to the related Actions menu > Integration System > Configure Integration Field Overrides.



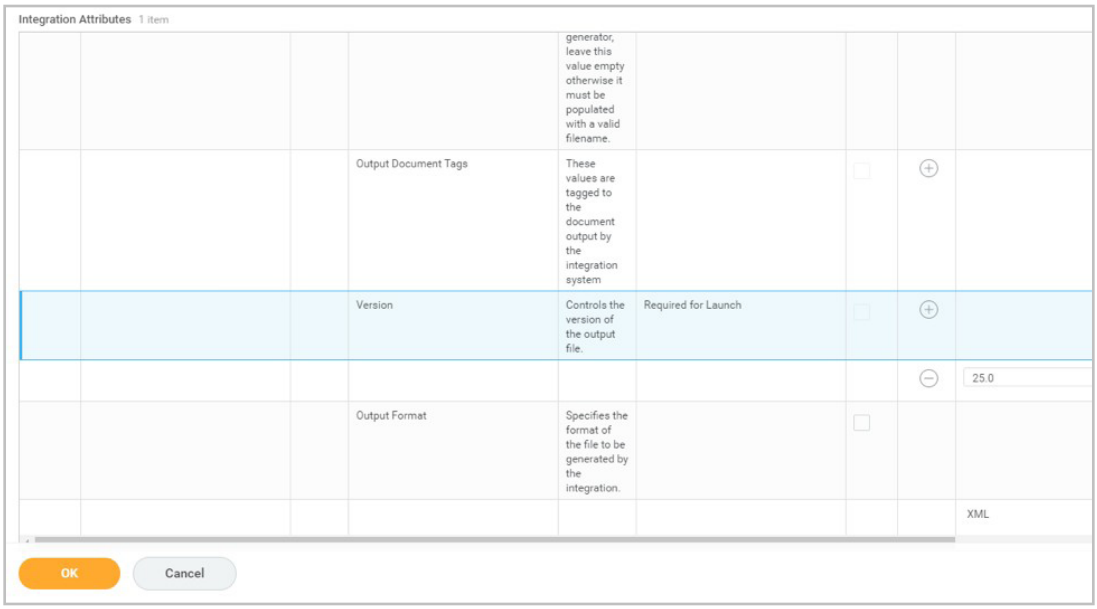
5. Setup the value mapping for the Field Overrides.



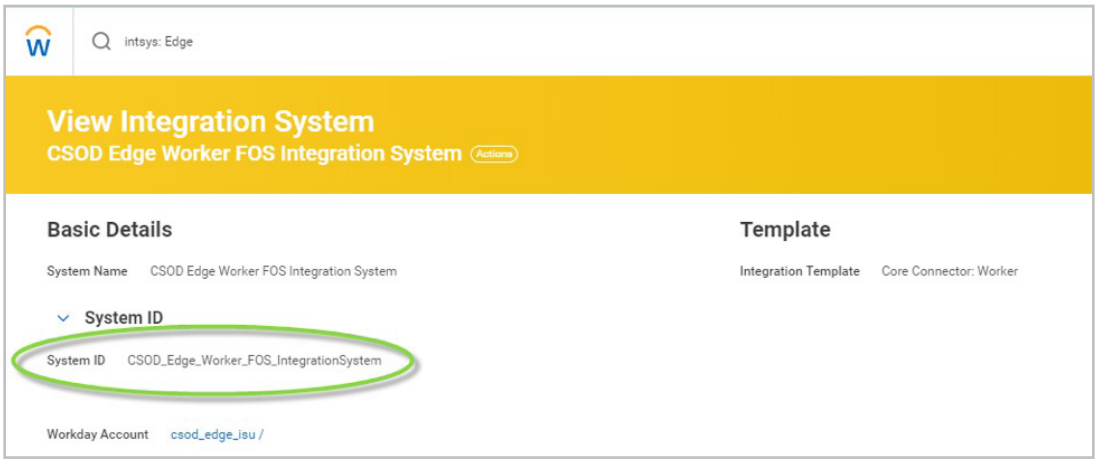
6. To clear the error on the integration system, go to the related action then Integration System > Configure Integration Attributes.



7. The “Version” attribute is the only field that is required to clear the error. The value that you choose for this field has no impact on the integration processing.



8. Note the Integration System ID and Integration Field Name values. These are required to configure the Override Field Mapping and Custom Field Mapping sections on the Edge Settings page in Cornerstone.
    - Using the Approver use case as an example, the values that will be entered in Cornerstone to set-up the Approver override is as follows:
        - System ID: CSOD_Edge_Worker_FOS_IntegrationSystem
        - Field Override Field Name: Approver_ID



To set-up the Eligibility Criteria feature in Cornerstone, note the values for the following fields:

- System ID
- Field Override Service Name
- Field Override Field Name

Refer to the screenshot and field values below for an example:

- System ID: CSOD_Edge_Worker_FOS_IntegrationSystem
- Field Override Service Name: CSOD_EDGE_FOS
- Field Override Field Name: CSOD_Worker_Eligibility Picture71

Enablement in Cornerstone

Using the following steps, this integration can be self-installed in your CSX Stage or Pilot to support your testing exercise. When ready to move to Production, please reach out to your Cornerstone Client Executive to have the integration installed in your CSX Production portal.

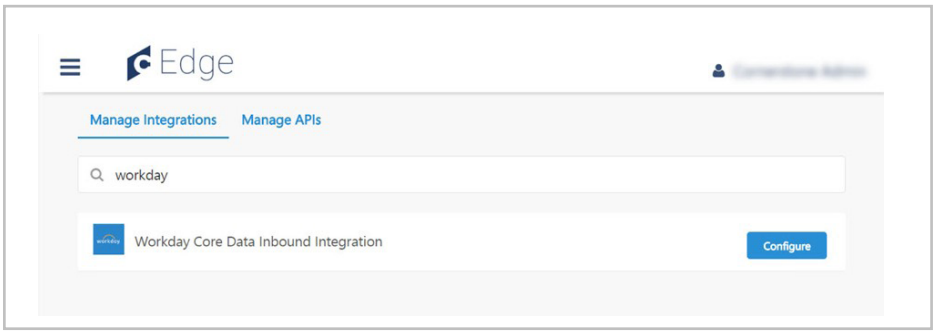
1. Log in to your Cornerstone stage or pilot portal.
2. Navigate to Admin > Tools > Edge > Marketplace.
3. Search for Workday Core Data Inbound Integration.
4. Install the integration then review and accept the Terms and Conditions.
   The Install button is only available in your Stage or Pilot environments. The Install button is not available in your Production portal.
5. Select Configure Now to be navigated to the settings page.

   Note: If you choose to configure later, you can access the integration by following the steps below.

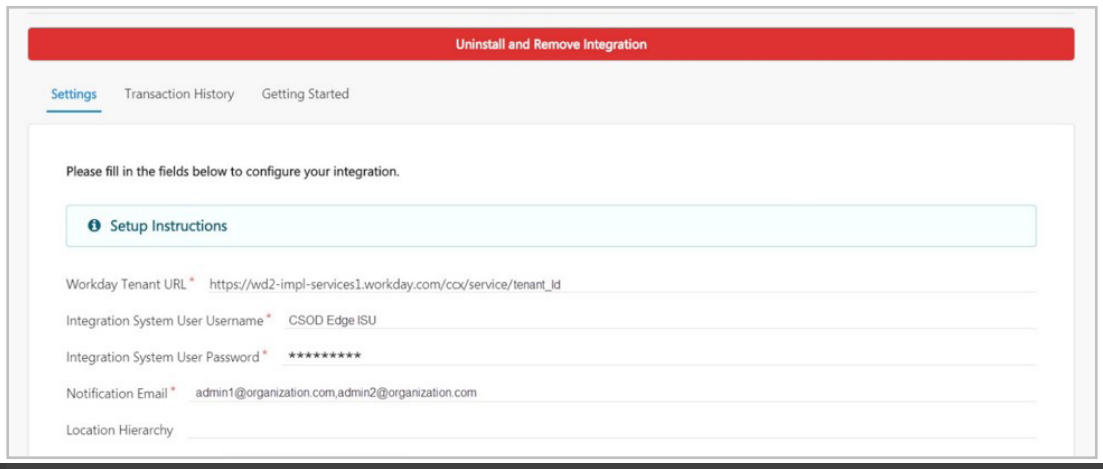
   a. Navigating to Admin > Tools > Edge > Integrations.

   b. Searching for “Workday”.

   c. Selecting Configure.



6. Configure the Settings page.

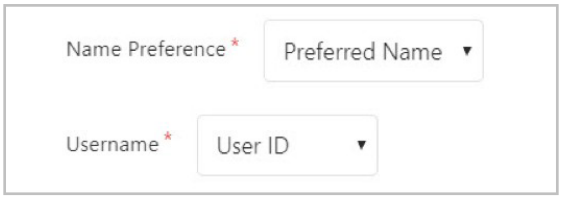


- **Workday Tenant URL** - This is your organization's unique endpoint identifier for the API calls. Make sure “Human_Resources/v....” is not part of the tenant URL. The tenant URL should be in the format below. The field is required to save the page.

  https://<DataCenter>.workday.com/ccx/services/<tenant_portal_name>

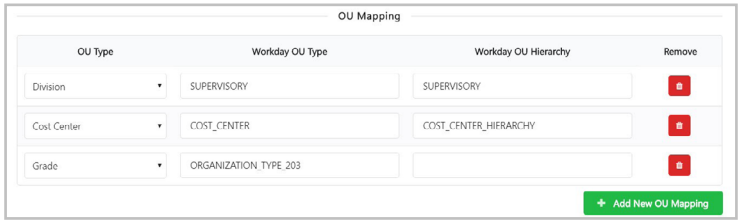
- **Integration System User Username and Password** - These are the ISU credentials created in Workday with the appropriate permissions to call Workday’s APIs. The fields are required to save the page.
- **Notification Email** - An audit log is generated each time the integration runs and will be delivered to the specified email(s). If entering multiple email addresses, separate each with a comma (,). You will receive an email notification when the integration starts and when it completes. The field is required to save the page.
- **Location Hierarchy** - This field allows you to create a parent-child relationship for Location OUs in Cornerstone. Enter your Workday Location Hierarchy Reference ID value to establish a hierarchical structure for your Location OUs. This is an optional field.
- **Employee Type Custom OU** - This dropdown field holds a list of custom OU types in your Cornerstone portal. The selected OU type will be used to indicate whether the user is an employee or a contingent worker in Workday. The OU type selected for this setting must include the options "Employee" and "Contingent Worker". This is an optional field. See Appendix Creating a Custom OU Type for details on how to create a custom OU type.
  Note the following:
  1. If the user's worker reference is marked as an "employee" in Workday, then Cornerstone will set the selected OU type as "Employee" on the user's User Record page.
  2. If the user's worker reference is marked as a "contingent worker" in Workday, then Cornerstone will set the selected OU type as "Contingent Worker" on the user's User Record page.
  3. If no value is selected in Employee Type Custom OU field on the Settings page, then no value will be set on the user's User Record page.
- **Eligibility Criteria** - This setting allows you to limit the user population synced from Workday to Cornerstone. This feature is enabled by turning on the “Enable Eligibility Criteria Data” toggle switch and entering values for the fields below. Refer to Configuring Field Override Service and Eligibility Criteria for additional details. This section is not required to save the page.
  1. Eligibility Criteria System ID
  2. Eligibility Criteria Field Override Service Name
  3. Eligibility Criteria Field Name

- **Name Preference** - This dropdown is used to specify whether to pull a user's legal name or preferred name from Workday. The selection will be loaded in Cornerstone as the user's first and last name. This field is required to save the page.
- **Username** – This dropdown defines which Workday field is mapped to Cornerstone's username. It can be configured to either the Workday User ID, Worker ID, or Work Email Address (must be public and primary). This field is required to save the page.
  Note: Typically, Workday contingent workers have a Worker ID but not a user ID. If your organization has contingent workers who should be synced into Cornerstone, then the recommended mapping for the Username field is to be mapped to Worker ID in the dropdown.



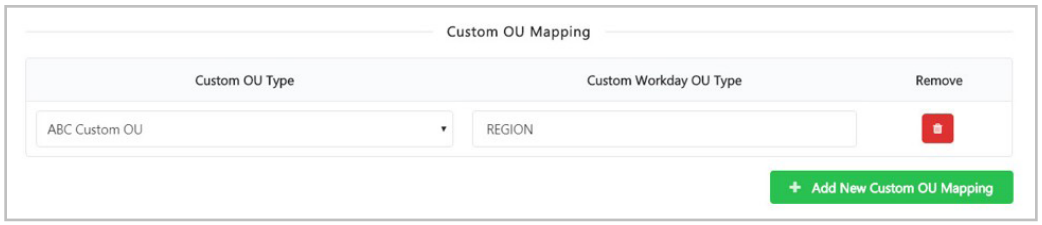
- **New Hire Sync Time** - This dropdown defines when new hire records (worker and/or contingent worker) will be created in Cornerstone. New hire records can be created in Cornerstone on either their effective hire date or a week prior to their effective hire date. Time is based on your data center local time. This field is required to save the page.
  If selecting "1 Week Prior Hire Date", note the following:
  1. When a new hire record is created one week prior to hire date, only the following fields are synced in Cornerstone: First Name, Last Name, User ID, Username, Email Address, Phone Number, Hire Date, standard OUs.
  2. The following fields will be updated in Cornerstone on hire date: Manager, Address, user custom fields, custom OUs.
- **Full and Delta Sync Now** - This allows you to sync the integration on-demand. See the Mode of Synchronization section for additional details.
- **Include in Sync** - This specifies what data type is included in each sync. The integration has the option to either sync user only, OU only, or both user and OU data. This field is required to save the page.
  - Only active users in Workday will be created/updated in Cornerstone. Changes to an inactive employee record in Workday will not be reflected in Cornerstone. In this case, the record will be flagged in the notification log as "Skipped".
  - Example: An inactive employee's email address is updated in Workday. Since the change is to an inactive employee's record in Workday, the integration will not update the inactive employee's email address in Cornerstone. This inactive user record will be flagged in the notification log as "Skipped".

- **OU Mapping** - This table enables you to specify the mapping between the Cornerstone standard OU types Division, Grade, and Cost Center and Workday organization types. Please refer to the screenshot below for an example.

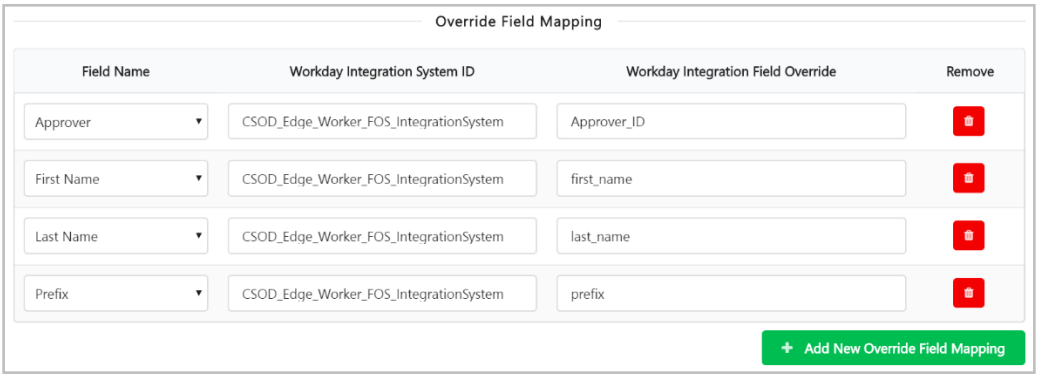


  - To configure the mapping:
    1. Click on the "+ Add New OU Mapping" button.
    2. Select an OU type from the dropdown field under OU Type.
    3. For the selected OU type, enter its corresponding:
       a. Workday OU type Reference ID value in the text box under the Workday OU Type column
       b. Workday OU Hierarchy Reference ID value in the text box under the Workday OU Hierarchy column.
          - This is an optional field that allows you to set up OUs in a parent-child relationship. If no value is provided, then the OUs will be loaded in a flat structure (i.e. no parent).
    4. Press "+ Add New OU Mapping" button if additional OUs need to be mapped.
  - Note the following:
    - Mapping of the OU types Location and Position are pre-defined and built into the integration.
      - » Workday's organization Locations are created as Cornerstone Location OUs.
        - The hierarchy for Location OU can be defined in the Location Hierarchy field on the Edge Settings page.
      - » Workday Job Profiles and Job Families are created as Cornerstone Positions.
        - The Position OU ID loaded in Cornerstone is in the following format: [Job Family ID]#[Job Profile ID].
        - The hierarchy for Position OU is pre-defined and built into the integration.
          - In Cornerstone, Job Profile is loaded as the child OU of Job Family (i.e. Job Family is the parent OU).
        - If Job Family Group API is not used in Workday, then the following logic will apply:
          - If the parent OU has at least one active child OU in its structure, then keep the parent OU active.
          - If the parent OU does not have any active child OUs (i.e. all child OUs are inactive), then inactivate the parent OU.

    - User record constraints that are implemented on the UI also apply to this integration. For example, if the Division OU is a required field on the User Profile page, then the Division OU must be mapped on the Settings page. If a user comes through the integration without a Division OU value, then the user will not be created/modified in Cornerstone.
    - Workday configurations for how Supervisory data are displayed will be followed in Cornerstone. For example, if Supervisory is configured in Workday to display both OU Code and Manager ID, then the OU in Cornerstone will be loaded in the following format: <OU Code> <OU Name> (<Supervisory Manager ID>). In the example "10000419 Personal Health APAC Marketing (21325717)", "10000419" is the OU code, "Personal Health APAC Marketing" is the OU name, and "(21325717)" is the supervisory's manager ID.
- **Custom OU Mapping** - This table enables you to specify the mapping between Cornerstone custom OU types and Workday organization types.



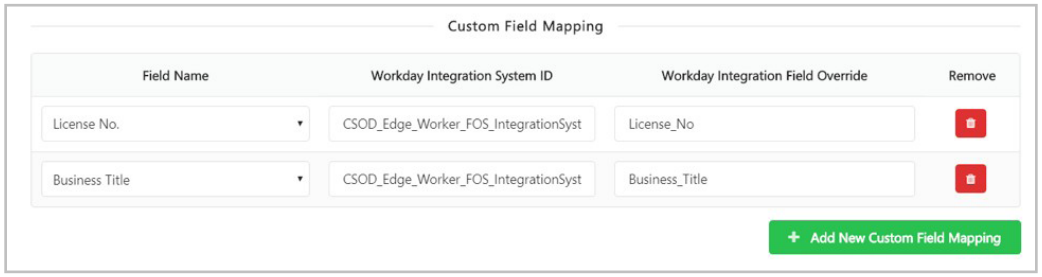
  - To configure the mapping:
    1. Click on the "+ Add New Custom OU Mapping" button.
    2. Select a custom OU type from the dropdown field under OU Type.
    3. Enter its corresponding Workday organization type Reference ID value in the textbox under the Custom Workday OU Type column.
    4. Press "+ Add New Custom OU Mapping" button if additional custom OUs need to be mapped.
  - Note the following:
    - Custom OUs are created without hierarchy in Cornerstone (i.e. no parent-child relationship)
    - User record constraints that are implemented on the UI also apply to this integration. For example, if a custom OU is a required field on the User Profile page, then the custom OU must be mapped on the Settings page. If a user comes through the integration without the custom OU value, then the user will not be created/modified in Cornerstone.
- **Override Field Mapping** - This table allows you to override the default mapping of the user fields "Approver", "First Name", "Last Name", and "Prefix". To override the default mappings, the Field Override Service needs to be configured in Workday. Refer to Configuring Field Override Service and Eligibility Criteria for additional details. This section is not required to save the page.



- To configure the mapping:
  1. Click on the "+ Add New Override Field Mapping" button.
  2. Select an option in the Field Name dropdown field.
  3. Enter the System ID value under the Workday Integration System ID column.
  4. Enter the Field Override Field Name under the Workday Integration Field Override column.
  5. Press "+ Add New Override Field Mapping" button if additional field overrides need to be mapped.
- Note the following:
  - To capture the tussenvoegsel portion of a user's name in Cornerstone, you may choose to override the default field mapping with either the Field Type "First Name" and/or "Last Name".
  - For users with both English and non-English names (e.g. Chinese), you may choose to map the non-English name by overriding the "Prefix" field.
  - To configure Approver, enter the Integration Field Override Service field name value

- **Custom Field Mapping** - This table allows you to map Workday worker fields to Cornerstone user custom fields. Refer to Configuring Field Override Service and Eligibility Criteria for additional details. This section is not required to save the page.
  - To configure the mapping:
    1. Click on the "+ Add New Custom Field Mapping" button.
    2. Select an option under the Field Name column.
    3. Populating the Workday Integration System ID.
    4. Populating the Workday Integration Field Override.

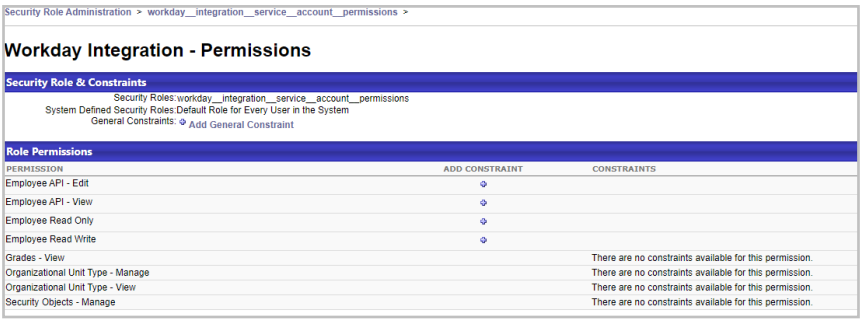
- Note that the integration only supports user custom fields of type short text box.



7. Click on Save Settings which will then take to the Manage Integrations page.
8. Search for Workday Core Data Inbound Integration and enable the integration by turning on the toggle switch.

   NOTE: A security role is automatically created when the integration runs for the first time. This is specific to the Workday Core Data Inbound integration and should not be deleted or altered. Any modification to this security role will cause the integration to fail. Please see details below.

   - Security Role Name: workday__integration__service__account__permissions
   - User associated with the security role: Integration, Workday
   - Role Permissions:



Modes of Synchronization

Scheduled Sync

The integration is scheduled to run nightly at 4:00 AM (based on local time of the data center your portal resides in) starting with the OU sync followed by the user sync. If the integration is configured to sync users only, then the user sync will start at 4:00 AM. Note that the time the sync completes will vary as this depends on the processing queue and the total number of records to be synchronized.

The nightly OU sync runs on full mode while the nightly user sync runs on delta mode. The nightly user sync searches for previous successful syncs that occurred within the past 7 days. If a sync did not run successfully in the past 7 days, then the integration will pull all user records that have been created and/or modified in Workday within the past 7 days. If a sync occurred successfully within the past 7 days, then the integration will pull all user records that have been created and/or modified in Workday from the last successful user sync.

On demand Sync

The integration can be triggered on-demand from the Edge Settings page using the Sync Now toggle switches. You can choose to run a delta or full sync.

Delta sync

To run a delta sync on-demand, turn on the Delta Sync Now toggle switch then click on the Save Settings page. The delta sync will pull all OUs and/or users that were created and/or modified in Workday since the last successful delta sync (scheduled or on-demand) within the past 7-day period.

Note the following:

- The toggle switch is turned off once the integration is triggered.
- The integration can only run once (scheduled or on-demand) within a 3-hour period AND if no other sync (user or OU) is currently running.

Full Sync

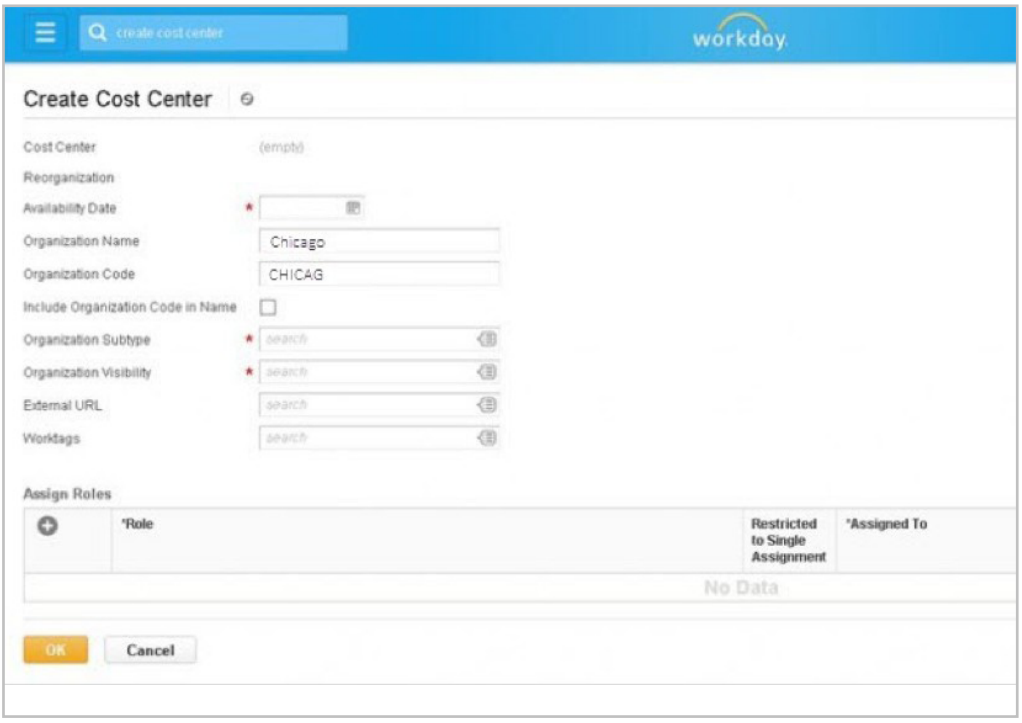
To run a full sync on-demand, turn on the Full Sync Now toggle switch then click on the Save Settings page. The full sync will pull all OUs and/or users from Workday.

Note the following:

- The toggle switch is turned off once the integration is triggered.
- The integration can only run once (scheduled or on-demand) within a 3-hour period AND if no other sync (user or OU) is currently running.

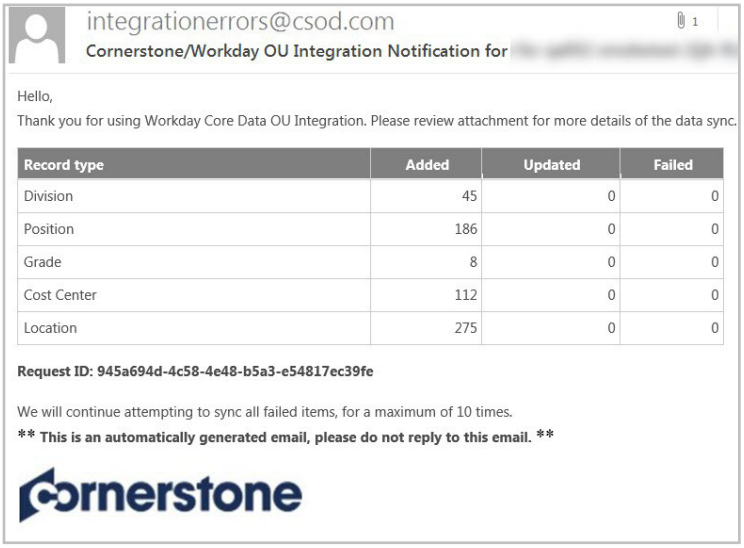
Organizational Unit Sync

1. Create and/or update an organization type in Workday.



Note: Organization Types refers to Workday's Cost Center, Job Profile, Location, etc

2. Once the synchronization process is complete, a summary and an audit log are delivered to the email addresses defined on the Edge Settings page. The summary and log will indicate the OUs created and/or modified via the OU sync.



integrationerrors@csod.com

Cornerstone/Workday OU Integration Notification for

Hello,

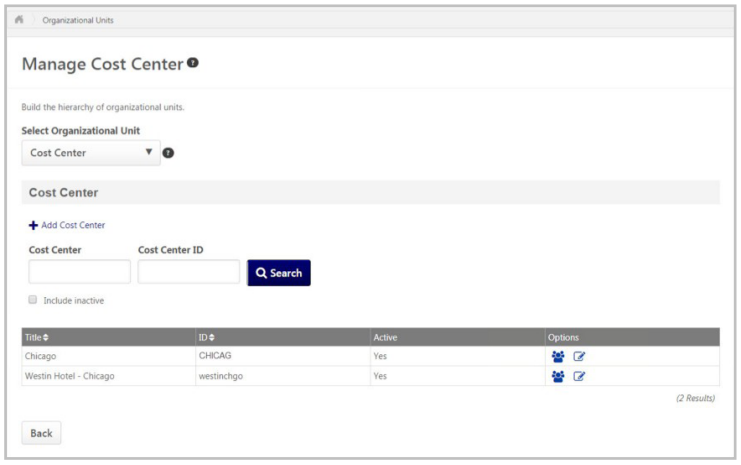
Thank you for using Workday Core Data OU Integration. Please review attachment for more details of the data sync.

Record type	Added	Updated	Failed
Division	45	0	0
Position	186	0	0
Grade	8	0	0
Cost Center	112	0	0
Location	275	0	0

Request ID: 945a694d-4c58-4e48-b5a3-e54817ec39fe

We will continue attempting to sync all failed items, for a maximum of 10 times.

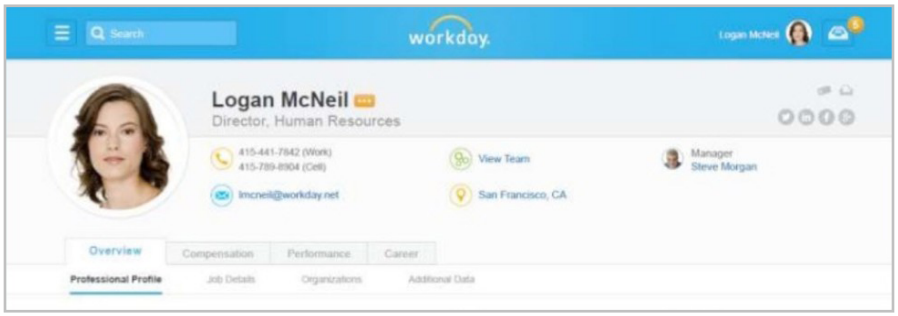
**** This is an automatically generated email, please do not reply to this email. ****



Note: Workday Job Profiles and Job Families are created as Cornerstone Positions. Job Profile is loaded as the child OU of Job Family (i.e. Job Family is the parent OU).

User Sync

1. Create and/or modify a worker record in Workday.



2. Once the synchronization process is complete, a summary and an audit log are delivered to the email addresses defined on the Edge Settings page. The summary and log will indicate the users created, modified, skipped, failed, and/or retried

FW: Cornerstone/Workday User Integration Notification for

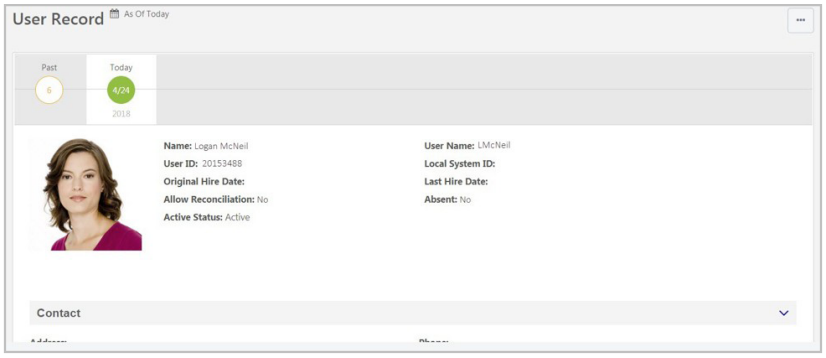
integrationerrors@csod.com

Hello,

Thank you for using Workday Core Data User Integration.

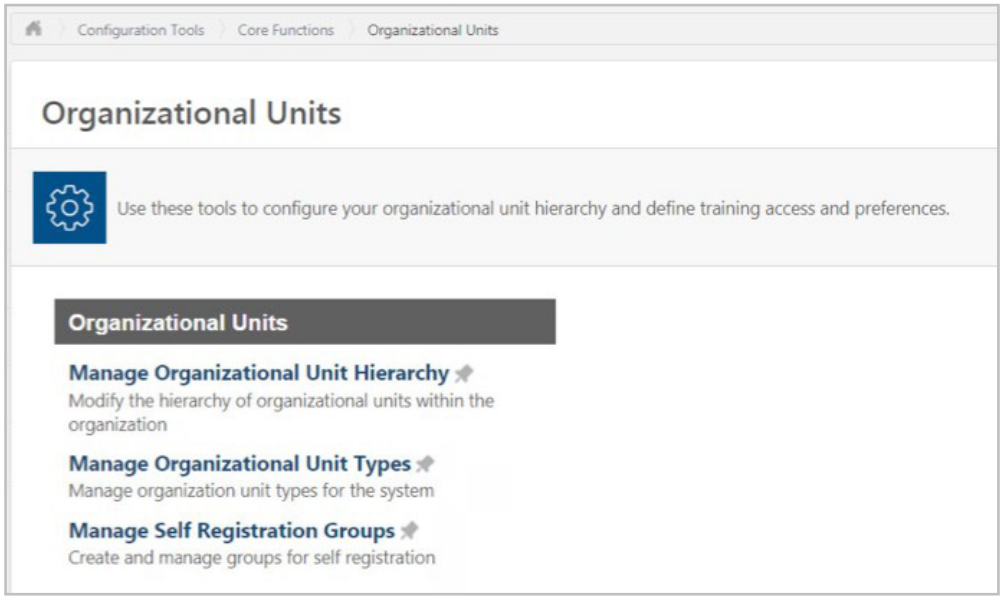
Please refer to the attached file (if exists) for more details.

Record type	Added	Updated	Skipped	Failed
User	4	9495	170	9

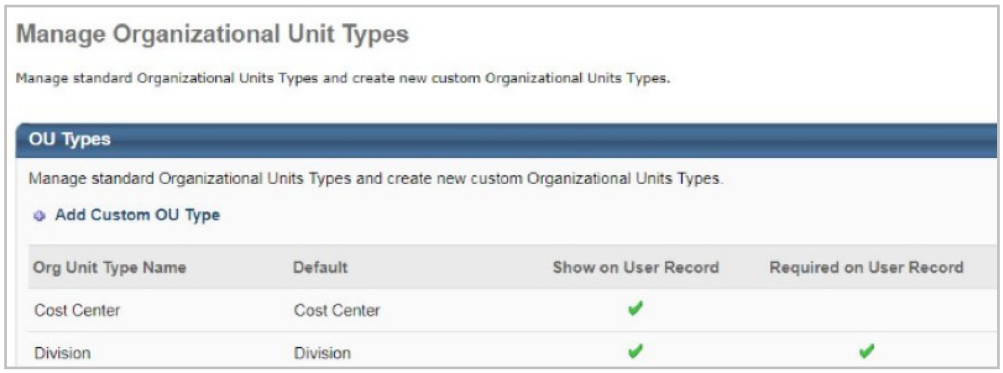

User Record
As Of Today
Past
6
Today
4/24
2018
Name: Logan McNeil
User ID: 20153488
Original Hire Date:
Allow Reconciliation: No
Active Status: Active
User Name: LMcNeil
Local System ID:
Last Hire Date:
Absent: No
Contact

APPENDIX
Creating an Employee type Custom OU

1. Navigate to Admin > Core Functions > Organization Units

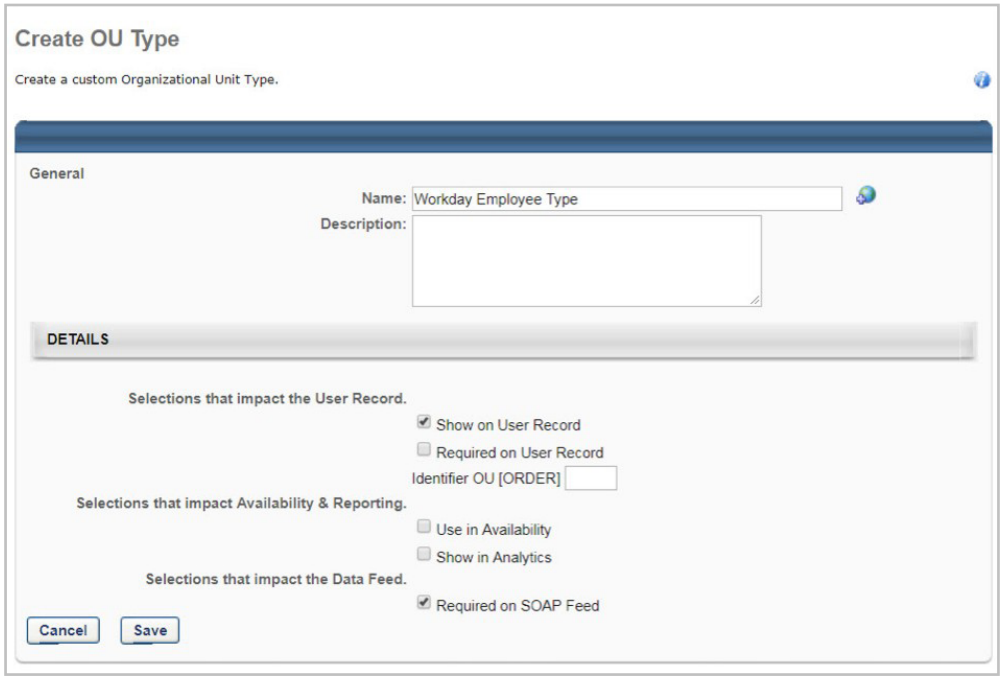


2. Select Manage Organization Unit Types

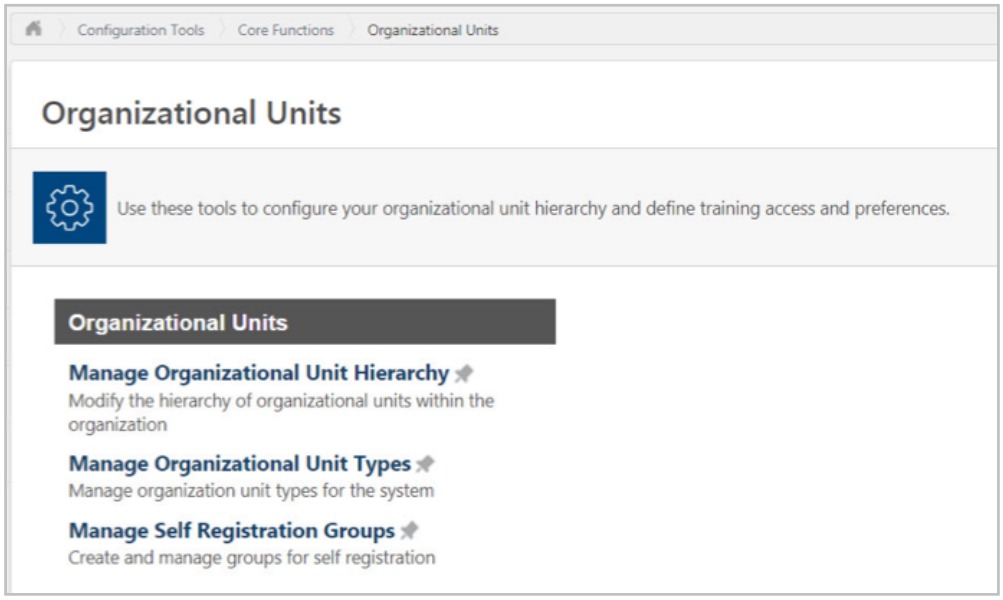


Note: If you do not have access to this page, please contact your CSM, Implementation partner/ consultant to assist with adding a custom OU type.

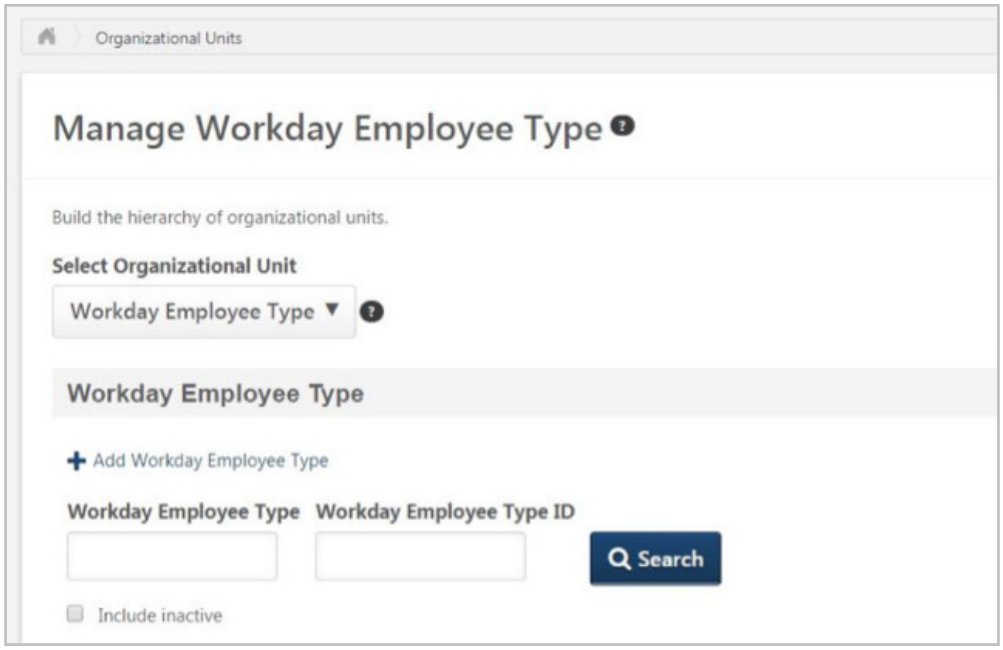
3. Select “Add Custom OU Type” then
    a. define its Name
    b. Set “Show on User Record”
    c. Set “Required on SOAP Feed”



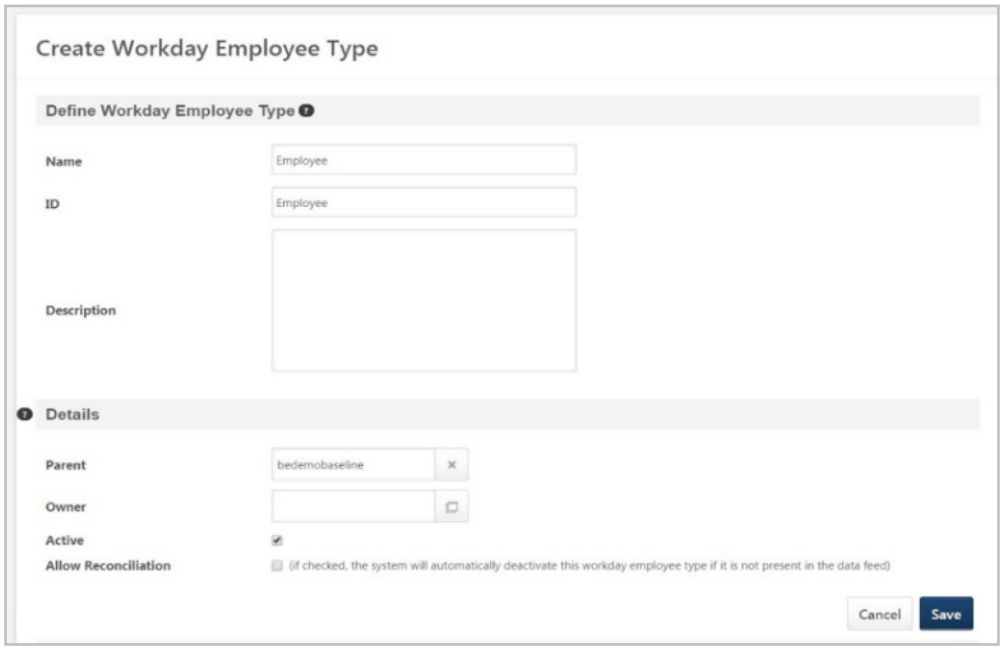
4. Save the new OU Type (ex: Workday Employee Type) and navigate back to Organization Units



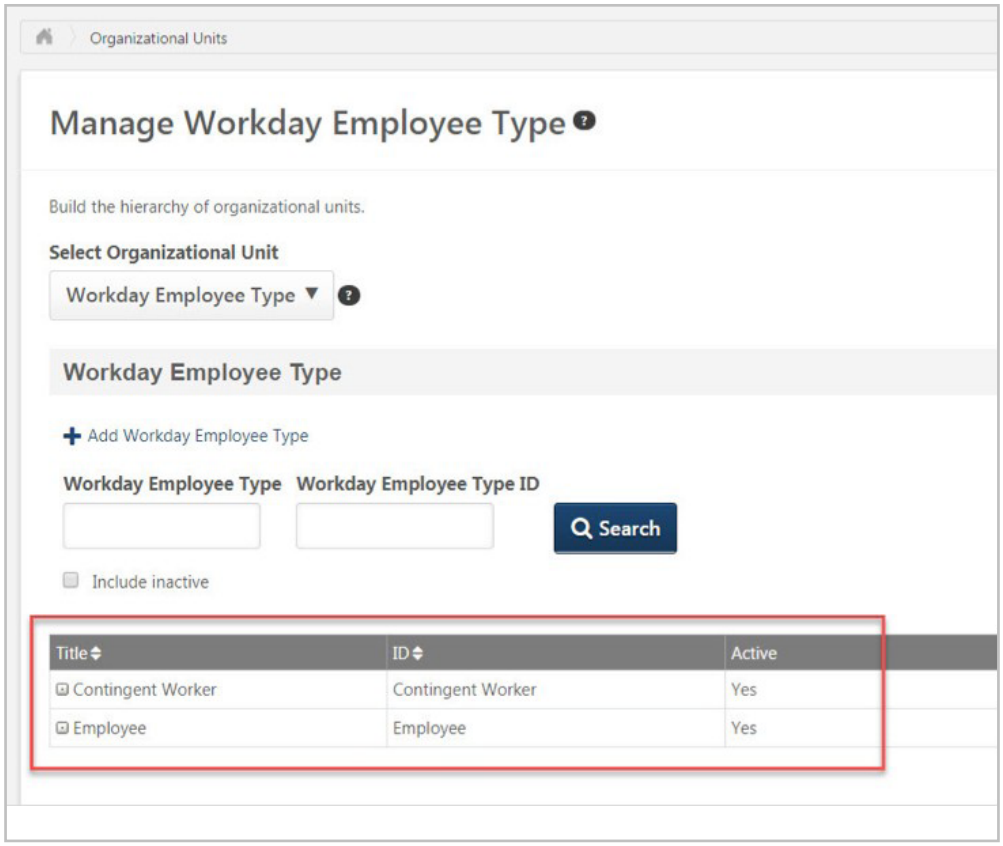
5. Select Manage Organization Unit Hierarchy
6. Select the OU type created in Step 3 from the Select Organizational Unit dropdown. Then, add an OU by clicking on the "+ Add [OU] Type" link.



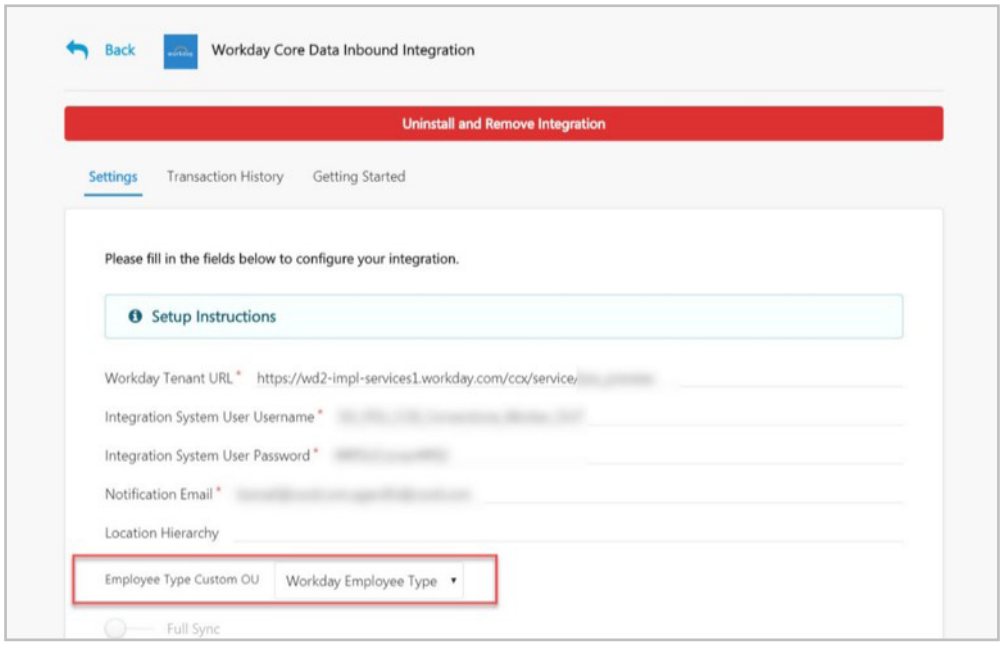
7. Populate the Name, ID, and select the Active checkbox.



For the Employee Type Custom OU, two OUs are needed: “Employee” and “Contingent Worker” as shown below

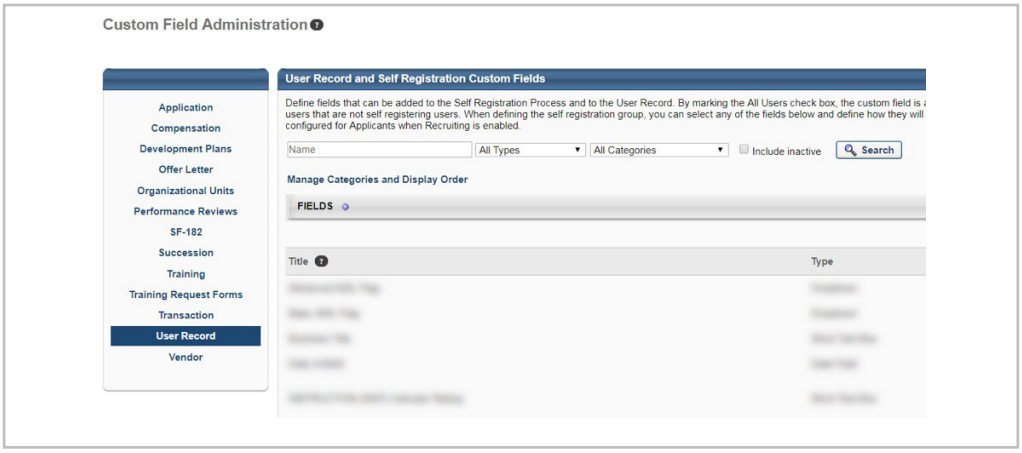


8. On the Edge Settings page, select this OU type from the Employee Type Custom OU dropdown.



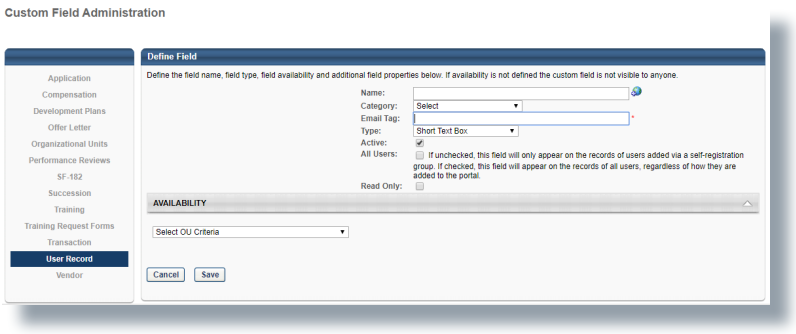
Creating a Custom Field on a User Record

1. Navigate to Admin > Core Functions > Custom Field Administration > User Record



2. Select + button next to FIELDS to add a new field and populate the following

- Name, Category and Email Tag
- Type: Short Text Box
- Active: select checkbox
- All users: select checkbox
- Availability



Note: To limit the availability to a certain population, select your availability criteria and add to it the following users:

- Admin, Cornerstone (cesadmin)
- Integration, Workday (workday_integration_user)

OU Mapping

Below is the overall mapping summary for Cornerstone OUs and Workday Organization Types.

#	CORNERSTONE ORGANIZATIONAL UNIT	WORKDAY ORGANIZATION TYPE	WORKDAY ORGANIZATION TYPE HIERARCHY	COMMENT
1	Division	Configurable	Configurable	e.g.: SUPERVISORY
2	Cost Center			e.g.: COST_CENTER and COST_ CENTER_HEIRARCHY
3	Grade			• The Grade OU can only be mapped to a Workday organization type. This cannot be mapped to a Workday user field (e.g. Compensation Grade)
4	Position	Job Profiles	Job Family	• Job Families are parents to Job Profiles • Mapping of Position OU and its hierarchy are pre-defined and built into the integration. These cannot be changed. • Position OU ID loaded in Cornerstone is in the following format: [Job Family ID]#[Job Profile ID]
5	Location	Locations	Configurable	• Mapping of Location OU is pre-defined and is built in the integration. This cannot be changed. • Mapping of Location OU hierarchy can be defined on the Edge Settings page. • Integration pulls the most recent business address fields from Workday
6	Custom OUs	Configurable	Not Applicable	

Note: Configuring Workday Organization Type Hierarchy allows the integration to identify OU parents and build a hierarchy in Cornerstone identical to that in Workday

Division & Grade & Cost Center OU

#	CORNERSTONE ORGANIZATIONAL UNIT	WORKDAY ORGANIZATION TYPE
1	ID	Organization Code
2	Name	Organization Name
3	Active	Active
4	Parent	Configurable Hierarchy

Position OU

#	CORNERSTONE ORGANIZATIONAL UNIT	WORKDAY ORGANIZATION TYPE
1	ID	Compound key Job Family ID # Job Profile ID
2	Name	Organization Name
3	Active	Active
4	Parent	Job Family

Location

#	CORNERSTONE ORGANIZATIONAL UNIT	WORKDAY ORGANIZATION TYPE
1	ID	Organization Code
2	Name	Organization Name
3	Active	Active
4	Parent	Configurable Hierarchy
5	Country	Country
6	Line 1	Line 1
7	Line 2	Line 2
8	City	City
9	State	State
10	Postal Code	Postal Code

Custom OUs

#	CORNERSTONE ORGANIZATIONAL UNIT	WORKDAY ORGANIZATION TYPE
1	ID	Organization Code
2	Name	Organization Name
3	Active	Active

USER MAPPING

Below is the overall field mapping for Cornerstone user and Workday user. Configurable fields are the ones that can be configured if needed.

#	CORNERSTONE FIELD	WORKDAY FIELD	COMMENT
1	User ID	WD Employee ID (aka Worker ID)	• Used as a unique identifier to determine whether a new user record will be created or updated in Cornerstone • Required field
2	Username	Configurable: • User ID • Worker ID • Work Email (Primary & Public)	• Required field
3	Active / In-Active Status	Terminated = In-Active Otherwise = Active	• Required field
4	Absent	True if Workday worker is active and on leave. Otherwise False	• Required field
5	Prefix	Configurable: • Populated based on Name Preference (Legal or Preferred), or • Overridden by mapping it to a Workday field override service	
6	First Name	Configurable: • Populated based on Name Preference (Legal or Preferred), or • Overridden by mapping it to a Workday field override service	• Required field
7	Middle Name	Configurable: • Populated based on Name Preference (Legal or Preferred), or	

8	Last Name	Configurable: • Populated based on Name Preference (Legal or Preferred), or • Overridden by mapping it to a Workday field override service	• Required field
9	Suffix	Configurable: • Populated based on Name Preference (Legal or Preferred)	
10	Primary Email	Work Email Address	• Public & primary work email
11	Work Phone	Work Phone Number	• Public & primary phone
12	Fax	Fax Number	
13	Country Code	Country	
14	Line1	Address Line 1	• Public & primary address line 1
15	Line2	Address Line 2	• Public & primary address line 2
16	City	City	• Public & primary address City
17	State/Province	State	• Public & primary address State
18	Postal Code	Postal Code	• Public & primary address postal code
19	Division	Configurable	• Populated by Organization Type Reference ID in WD.
20	Grade		
21	Cost Center		
22	Location	Location	
23	Position	Compound Key Job_Family_ID # Job_Profile_ID	• If a worker has more than one position, the primary Job Profile is selected
24	Custom OUs	Configurable	
25	Last Hire Date	Hire Date	• Required field
26	Original Hire Date	Original Hire Date	• Required field
27	Required Approvals	Defaults to 1 Defaults to 2 if Approver is configured	
28	Approver ID	Configurable: Approver	• Document Field Override via Integration System
29	Manager	Manager Employee	
30	Termination Date	Termination Date	
31	Custom short text box fields	Configurable	• Document Field Override via Integration System

FAQ

Q: Can the scheduled run time be modified?

A: No, the integration run time is currently not configurable.

Q: I don't have access to create an ISU, security group, and/or access Workday Community. Where can I get assistance?

A: Please work with your organization's Workday Administrator and/or Workday project team.

Q: Does the integration pull the hierarchy of Workday Organization Types?

A: Yes. The integration allows the hierarchy to be defined for Standard OUs. This can be done by mapping Cornerstone's OUs to Workday Organization Types and defining their Hierarchy

Q: Can the integration differentiate between Workday user types?

A: Yes, the integration has the ability to specify in Cornerstone whether a user is an employee or a contingent worker in Workday. Please see "Employee Type Custom OU" on page 17.

Q: Do I get a notification when the integration runs?

A: Yes. The integration sends a notification email to a configurable subscription list. The emails will have an audit log with all OUs and users that were synchronized.

Q: Do user profile pictures for employees get transfered from Workday to Cornerstone?

A: No. The integration does not synchronize user profile pictures

Q: How long does the initial sync run for?

A: Sync run times can vary depending on the volume of data in your portal. Large clients have reported 20+ hours to receive the log email and smaller clients have reported 8+ plus hours. Ongoing delta syncs should run much quicker after the initial larger sync. See below for additional details.

The total synchronization duration is a combination of multiple factors: time required to fetch data from Workday using Workday API, saving data to Cornerstone systems using Employee service API, and number of syncs running at any given point of time on the Workday integration service.

There are multiple reasons for this.

- In the case where a full sync has never run in a portal, the sync duration is always set to the past seven days from the current sync time. This causes increased number of records to be fetched from Workday. If a full sync ran successfully before the current sync, then the sync duration would be from last successful sync to the current sync time -1 hour.
- Integrations where eligibility criteria (EC) is enabled on the Settings page will experience a longer sync time compared to those without EC enabled.
- Since all daily scheduled Workday integrations on a data center are triggered at the same time, there is an increased load the services used to save the date in Cornerstone.

Q: Can the integration filter on various Contingent Worker types?

A: The current integration does not filter on Contingent Worker Types. This may be added as an enhancement in the future. This topic has also been covered under the Workday Community on Success Center.

Q: When a contingent worker becomes an employee, what is the best workaround to avoid the error related to non-unique username (Error: Username- The value provided for this field must be unique across the system)?

A: The error comes up when a contingent worker is converted to an employee in Workday and the worker is given a new user ID but the username stays the same. In order to create a new record, the recommendation is to update both the user ID and username when converting a contingent worker to an employee.

Q: Are there any Workday outages that will impact the user/OU sync?

A: Please also be aware of Workday initiated downtimes that may impact your scheduled Edge Workday syncs. Should your sync be impacted, any missed data would be synced when the next delta runs again. Please reach out to Workday for maintenance calendar updates.

Support

For Cornerstone-related questions or to report issues, please submit a Global Product Support (GPS) case through Success Center. Preface the subject line with "Workday Core".