



# **Workday Transcript Outbound Integration**

## **Edge Integration Guide**



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# Version history

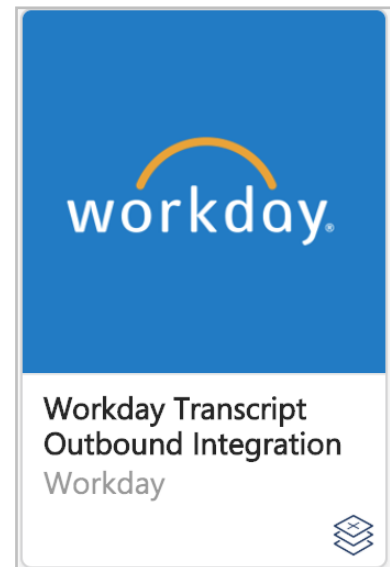
	DATE	DESCRIPTION
1.0	September 20, 2018	Document creation
2.0	October 25, 2018	Updated Workflow section
3.0	January 31, 2019	Elaborating on how to get Training Type IDs from Workday Updated FAQs
4.0	July 29, 2019	Version table > add version 4.0 Page 9
5.0	September 2, 2019	Updated sync time from 5:30 AM PT to 5:30 AM local time
6.0	January 12, 2021	Added "Considerations" section Updated Setup Instructions in Cornerstone > Learning Object Mapping and User Exclusion Criteria Updated Workflow section
7.0	April 2024	Updated Setup Instructions in Cornerstone > Notification Email

# Overview

The Workday Transcript Outbound integration enables organizations to transmit active user's completed transcript records from Cornerstone to Workday.

The following functionalities are included with the integration:

- Unidirectional transfer of completed transcript records of active employees and/or contingent workers
- Ability to include contingent workers through a custom organizational unit (OU)
- Ability to exclude users from the integration based on OU and/or user custom field value
- Ability to exclude transcripts of certain trainings based on a training custom field type checkbox
- Summary and log of synced transcripts via email notification
- Daily synchronization
- Ability to run the integration on-demand



## Considerations

- A Workday-certified administrator with appropriate permissions is required to configure the enablement in Workday. Cornerstone will not consult on Workday-related configuration.
- The integration supports synchronizing the following learning object (LO) types: online course, event, session, curriculum, test, external training, material, video.
- The integration does NOT support synchronizing historical completion data for a recurring LO.

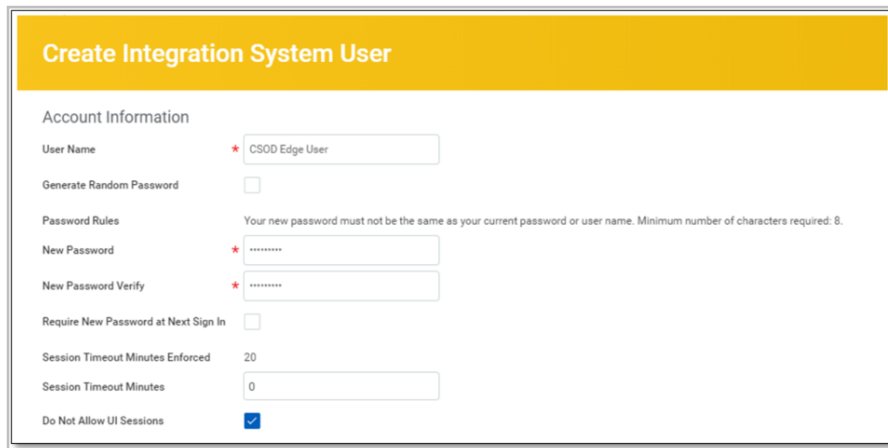
# Enablement

A Workday Administrator account with the appropriate permissions and active users (employee and/or contingent worker) with corresponding Workday user records are necessary.

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

## Prerequisite Setup in Workday

1. Log in to your Workday tenant.
2. Create an Integration System User (ISU) to be used for the integration.



**Create Integration System User**

Account Information

User Name \* CSOD Edge User

Generate Random Password

Password Rules Your new password must not be the same as your current password or user name. Minimum number of characters required: 8.

New Password \* .....

New Password Verify \* .....

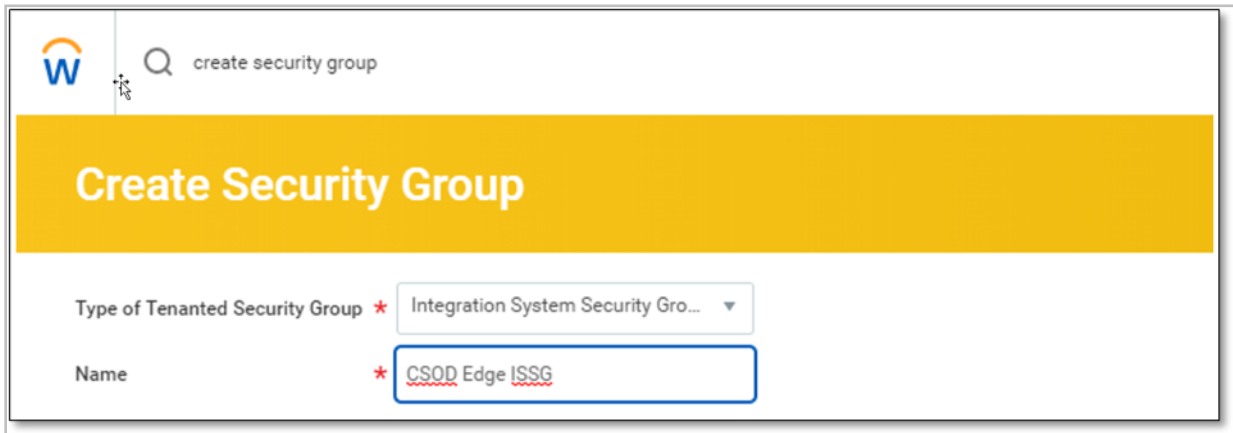
Require New Password at Next Sign In

Session Timeout Minutes Enforced 20

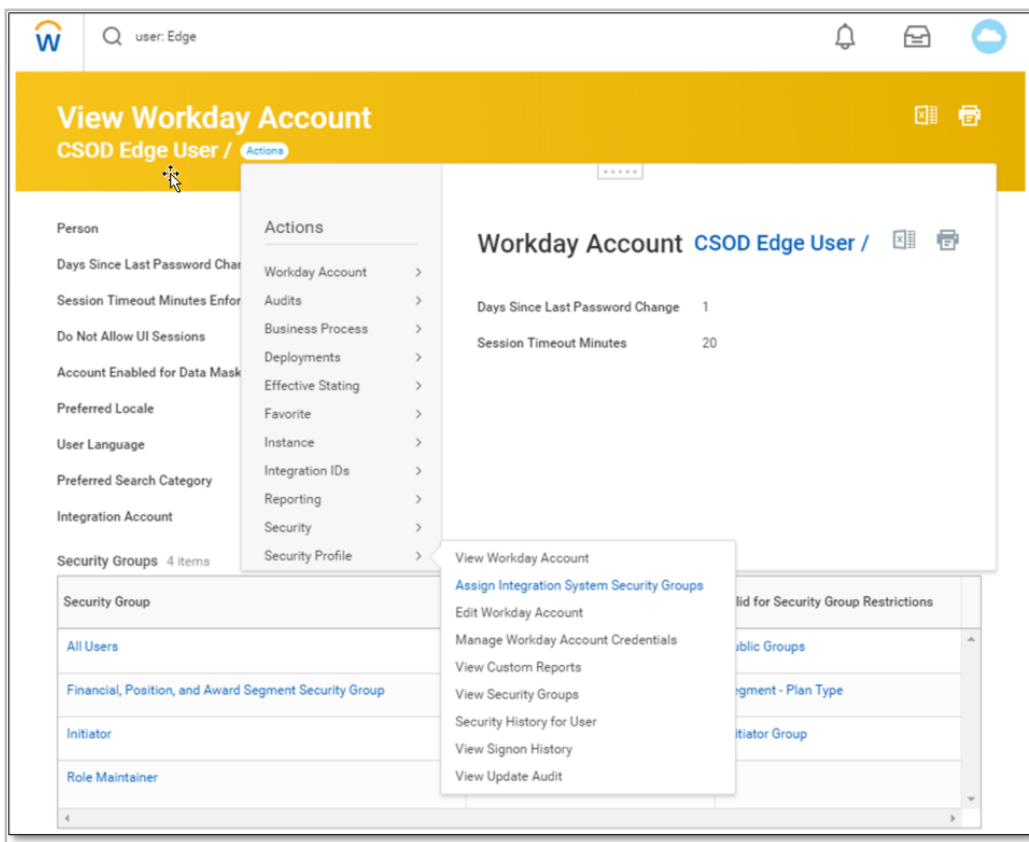
Session Timeout Minutes 0

Do Not Allow UI Sessions

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



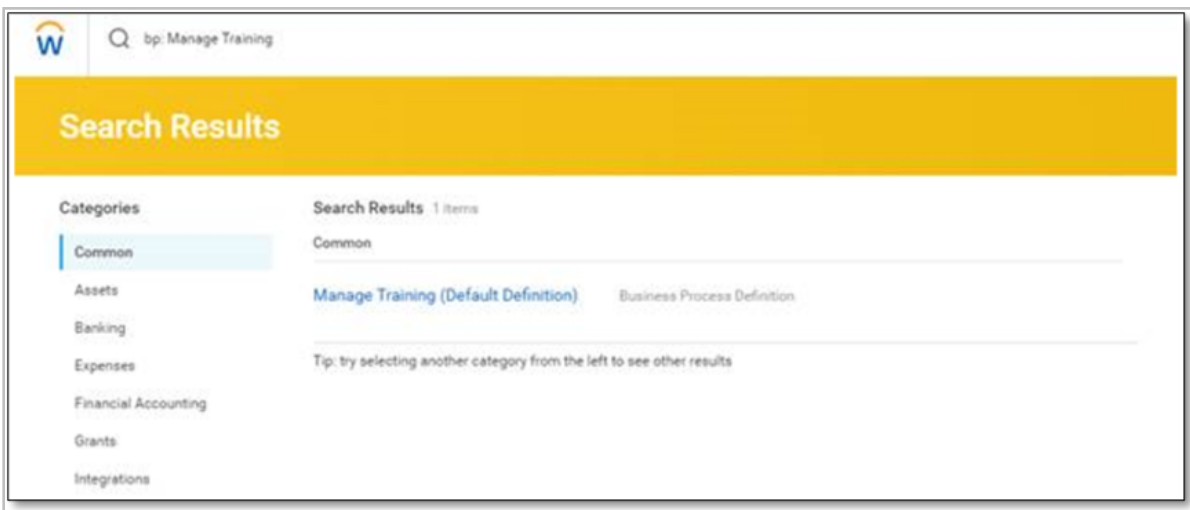
4. Add the ISU to the unconstrained security group.



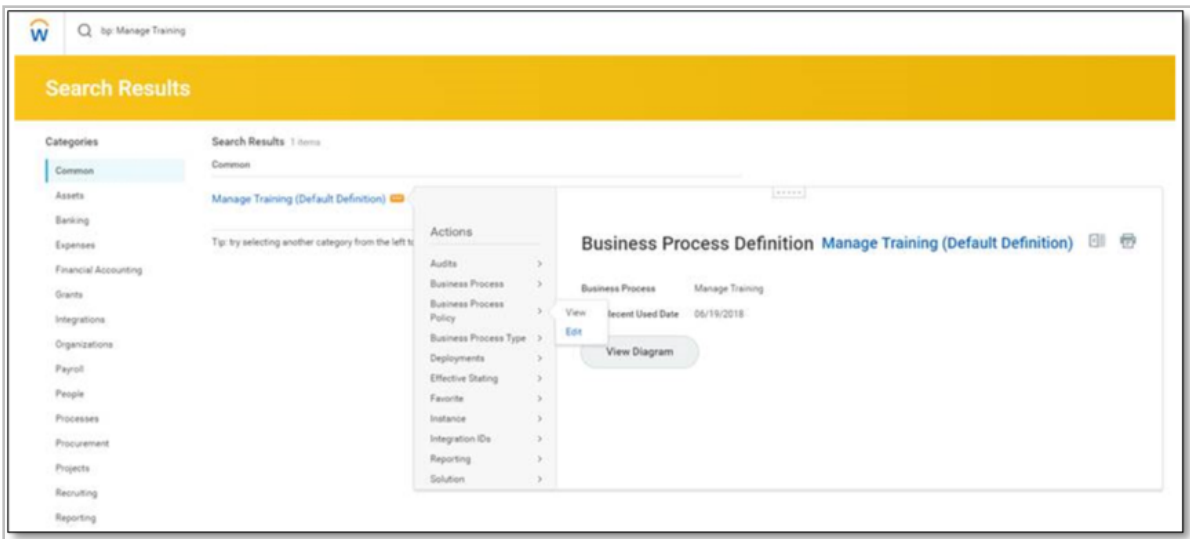
5. Add the business process security policy permission noted in the table to the security group.
  - a. Enter “BP: Manage Training” in the search bar.

Business Process Security Policy Permissions		
Operation	Business Process Type	Functional Area
Initiate (Manage Training (Web Service))	Manage Training	Talent Core

- b. Use the related action and go to “Business Process Policy > Edit”.



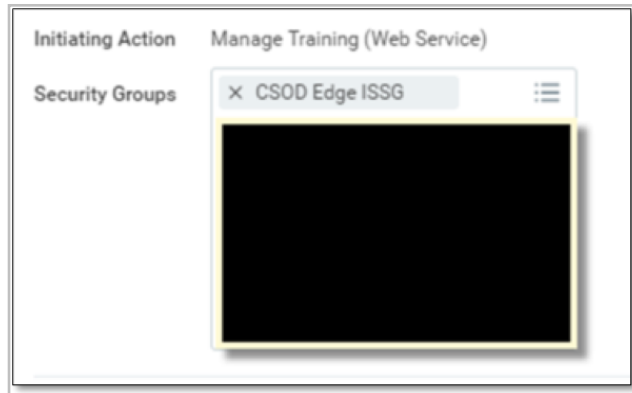
- c. Scroll down to the “Manage Training (Web Service))” initiating action and make sure the ISU group that you created for the integration is added.



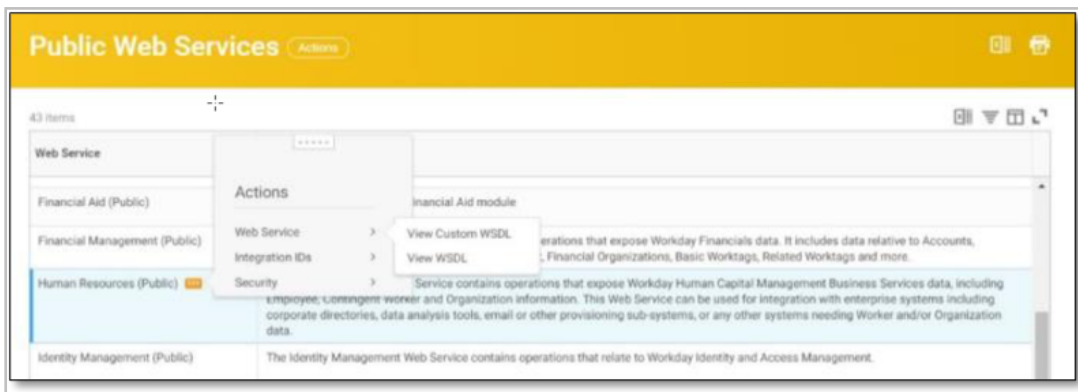
6. Retrieve your Workday tenant endpoint URL.

a. Steps to identify your tenant URL:

- i. On your Workday Community portal, search for Public Web Services.



- ii. Select View WSDL.



- iii. Search for “address location”.

- iv. Copy the URL (e.g. see the URL in the red box below).

```
<soapbind:body use="literal"/>
<soapbind:header message="wd-wsdl:Workday_Common_HeaderMsg" part="header" use="literal"/>
</wsdl:input>
<wsdl:output name="Import_Universal_IdentifierOutput">
  <soapbind:body use="literal"/>
</wsdl:output>
<wsdl:fault name="Processing_Fault">
  <soapbind:fault name="Processing_Fault" use="literal"/>
</wsdl:fault>
<wsdl:fault name="Validation_Fault">
  <soapbind:fault name="Validation_fault" use="literal"/>
</wsdl:fault>
</wsdl:operation>
</wsdl:binding>
<wsdl:service name="Human_ResourcesService">
  <wsdl:port name="Human_Resources" binding="wd-wsdl:Human_ResourcesBinding">
    <soapbind:address location="https://wd2-impl-services1.workday.com/ccx/service/tenant_portal/Human_Resources/v30.1"/>
  </wsdl:port>
</wsdl:service>
</wsdl:definitions>
```

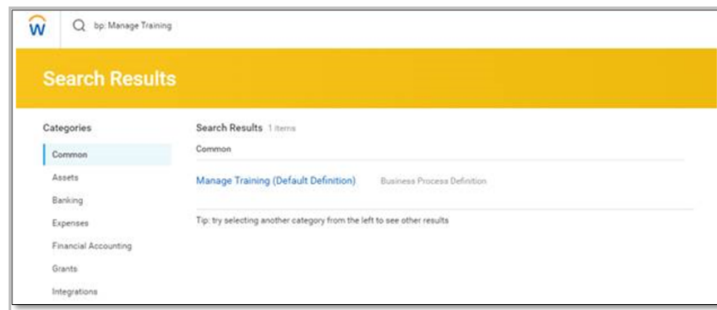


b. Note the following items:

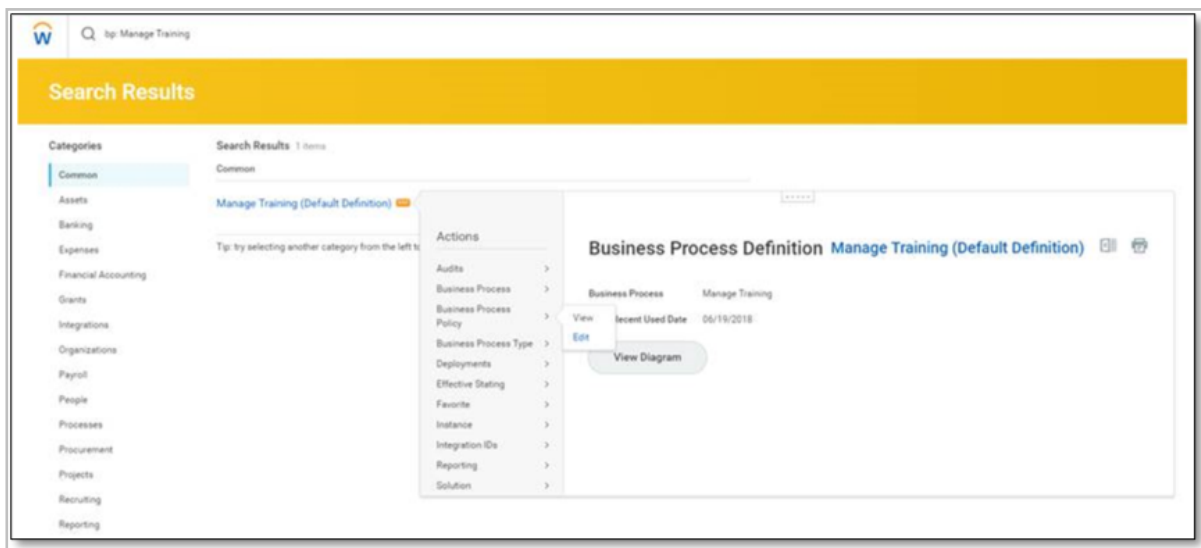
- i. You may have multiple Workday tenant environments (sandbox/implementation and/or production). Please copy the appropriate endpoint URL.
- ii. An example of a Workday tenant URL for a company that belongs to the production data center in Portland is <https://wd5-services1.myworkday.com/ccx/service/ACMECompany/>. “ACMECompany” is your company’s Workday tenant name. Please make sure to enter the entire URL including the “/” after “ACMECompany”.

7. Retrieve your Training Type IDs. This can be done by following the below steps:

- a. Search for Training Types.
- b. Select Actions > Integration IDs > View IDs to display the Organization Types and their Reference ID Value.



c. The ID column holds the corresponding value for a Workday Training Type ID.

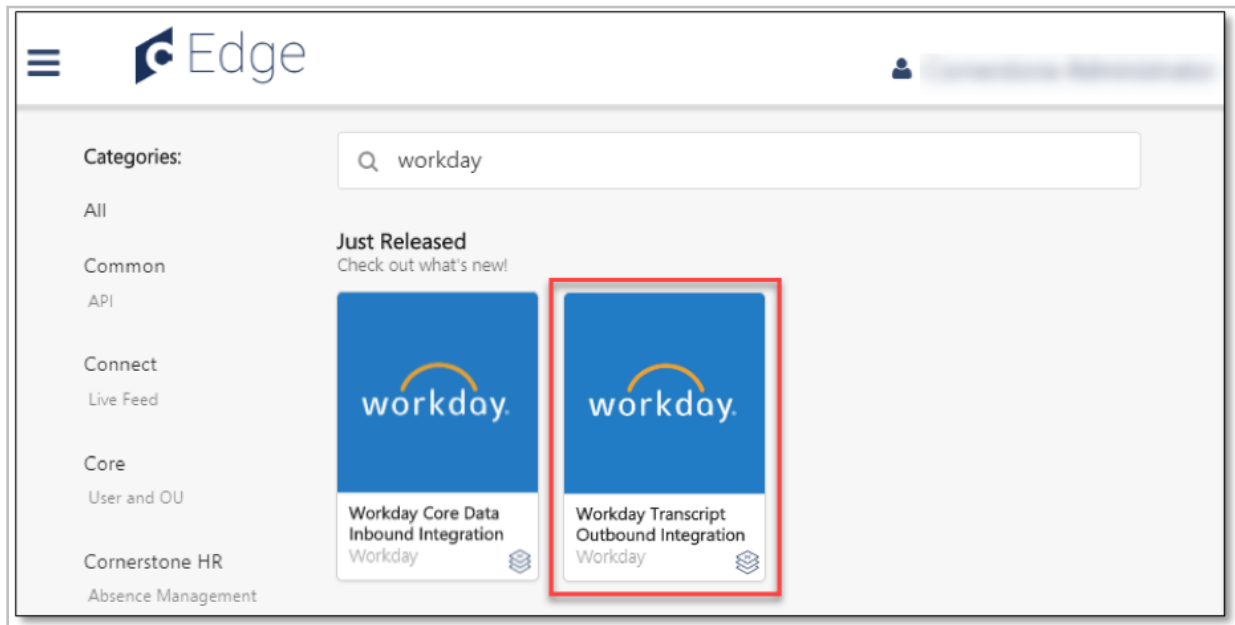


# Setup Instructions In Cornerstone

The 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.

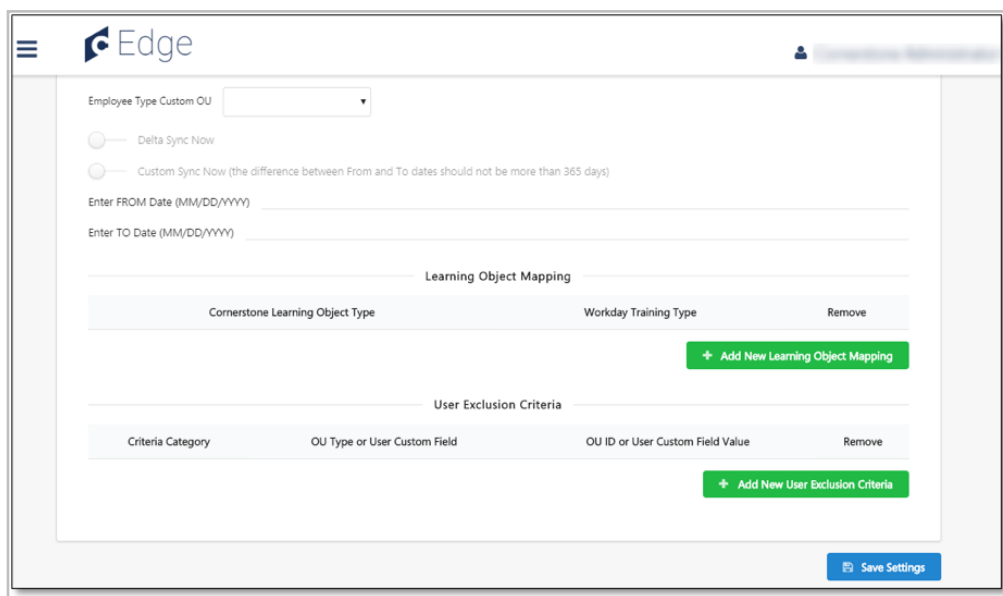
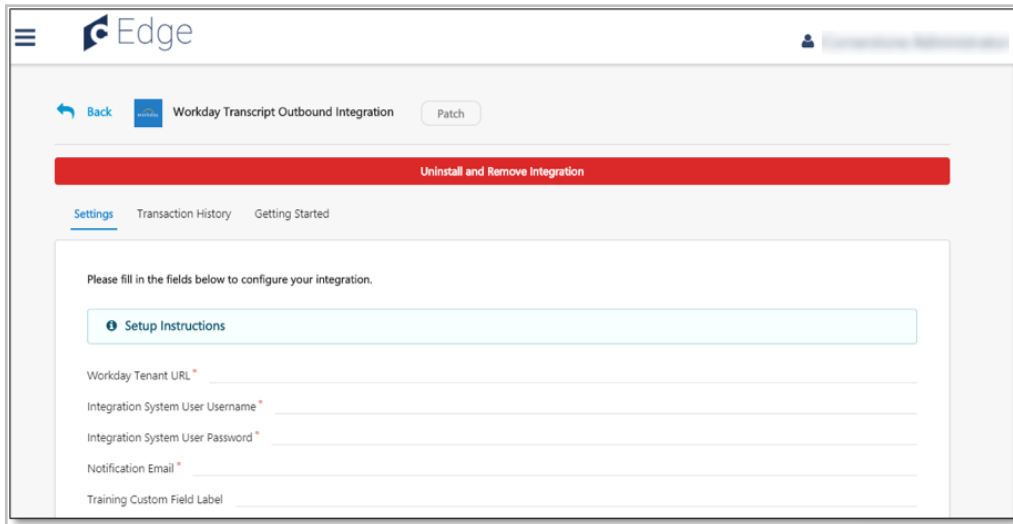
Once enabled in production, start at Step 7 after navigating to Admin Tools > Edge > Integrations and selecting the Workday Transcript Outbound Integration's Configuration button.

1. Log in to your Cornerstone portal.
2. Navigate to the **Edge Marketplace** (Admin > Tools > Edge > Marketplace) and search for **Workday**.
3. Click on the **Workday Transcript Outbound Integration** tile.
4. Click on the **Install** button.



5. Review the terms and conditions then select the checkbox **I have read, understand, and agree to the above terms and conditions**. Click on **Install**.
6. Click on **Configure Now**. You will then be directed to the **Settings** page.

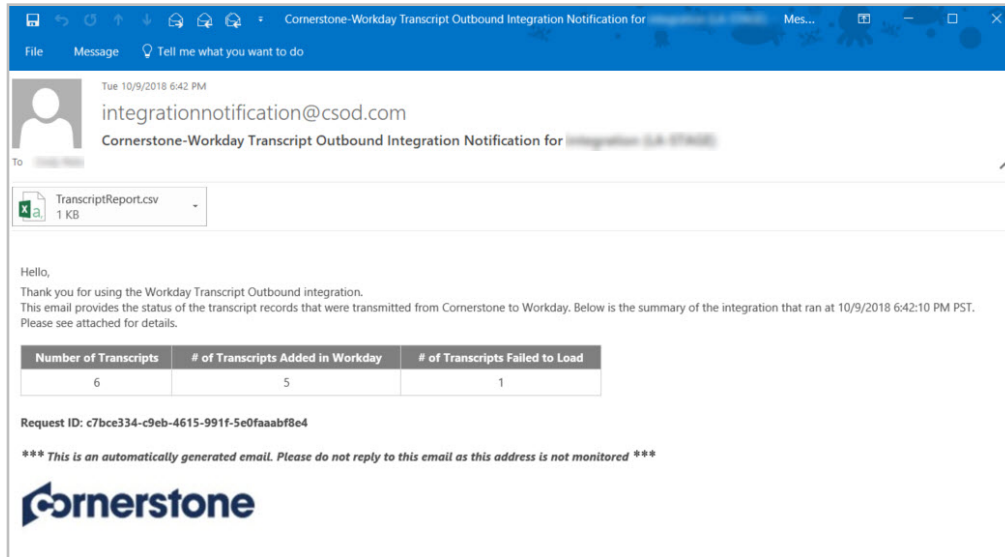
7. Configure the integration on the **Settings** page.



- a. **Workday Tenant URL:** This is your organization’s unique Workday endpoint for the API call and will be retrieved from your Workday tenant. This will be specific to your Workday tenant and environment. This is a required field. [See Step 6 under Prerequisite Step in Workday.](#)
- b. **Integration System User and Password:** These credentials are created in your Workday tenant and must have the appropriate permissions. These are used to authorize Cornerstone to connect to Workday’s Manage Training API. The ISU password is a masked field, i.e. entered value will not appear in plain text. These are required fields. [See Steps 2-5 under Prerequisite Step in Workday.](#)

c. **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 (,). This is a required field.

- NOTE: Attachment logs that are bigger than 20MB will be attached as a zip file.
- Below is an example of the email notification and log sent to the recipient



A	B	C	D	E
User ID	Learning Object ID	Learning Object Title	Status	Error Message
31527	7af16b11-bf82-4eba-8ba4-29ccc1773dbd	1001 Ways to Reward Employees	Success	
21501	e924a992-8da3-4547-b33a-8b587c586307	1001 Ways to Take Initiative at Work	Success	
21501	1436b06c-1ff4-48d1-9c5e-fe6fc32597c	Demo Material 1	Success	
21504	e924a992-8da3-4547-b33a-8b587c586307	1001 Ways to Take Initiative at Work	Success	
121	e924a992-8da3-4547-b33a-8b587c586307	1001 Ways to Take Initiative at Work	Success	
164313	d5d45c73-d00c-5b5a-a73c-4e4dd7170871	Where to Focus: Weaknesses or Strengths?	Error	Validation error occurred. Invalid ID value. 'abc000044' is not a valid ID value for type = 'Employee_ID'

d. **Training Custom Field Label:** This is a training custom field in your Cornerstone portal that allows you to sync transcripts for only specified trainings. This feature supports training custom field type checkbox only. The training custom checkbox field will appear on the training’s Course Details page. This is an optional field.

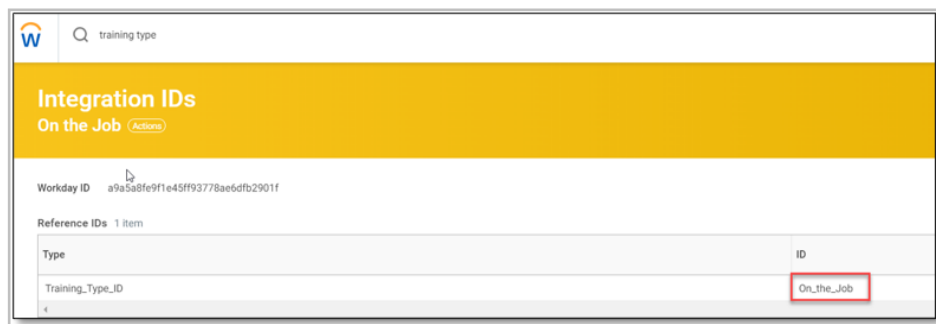
- If a field label is provided on the Settings page and the checkbox is selected for a training on the Course Detail page, then only completed transcripts for this specific training will be included in the synchronization.
- If a field label is provided on the Settings page and the checkbox is not selected for a training on the Course Detail page, then completed transcripts for this specific training will NOT be included in the synchronization.
- If a field label is not provided on the Settings page, then all completed transcripts that fall under the criteria specified on the Settings page will be included in the synchronization.

- The integration will only check the training custom field on the Course Details page (i.e. not on the Transcript page or anywhere else the field is available or editable in the system).
  - ▶ For example, let's say that the training custom field is configured to be editable on the Transcript page by either the admin or user. If the training custom field is selected for a course on the Course Details page but an admin or user unselected the field on the Transcript page, the integration will ignore the setting on the Transcript page and will send the completed transcript record to Workday..
- e. **Employee Type Custom OU:** This is a custom Organizational Unit (OU) in your Cornerstone portal which will be used to determine whether a transcript record will be loaded as an employee or contingent worker in Workday. The dropdown list contains all active custom OU types available in your portal. The selected custom OU type (ex: Workday Employee Type) must include the options "Employee" and "Contingent Worker". This is an optional field.
  - If the user has the Workday Employee Type value as "Employee", then Cornerstone will load the transcript record for this user as an Employee type.
  - If the user has the Workday Employee Type value as "Contingent Worker", then Cornerstone will load the transcript record for this user as an Contingent Worker type.
  - If no value is selected in Employee Type Custom OU field, then the transcript record will be loaded as an employee type.
- f. **Sync Toggle Switches.**
  - Delta Sync Now.
    - ▶ To run a delta sync on-demand, turn on the toggle switch then click on the **Save Settings** button.
    - ▶ The delta sync will pull all completed transcripts that occurred from the last delta integration sync (scheduled or on-demand) AND that fall under the criteria specified on the Settings page.
    - ▶ Note the following:
      - If the delta sync is enabled prior to the initial scheduled run, the integration will pull all completed transcripts that occurred within the last 24 hours AND fall under the criteria specified on the Settings page.
    - ▶ This is an optional field.
  - Custom Sync Now.
    - ▶ To run a custom sync on-demand, perform the following actions:

- Turn on the toggle switch.
- Enter a value in **Enter FROM Date (MM/DD/YYYY)**.
- Enter a value in **Enter TO Date (MM/DD/YYYY)**.
- Click on the **Save Settings** button.
- ▶ The custom sync will pull all completed transcripts that occurred between the From and To dates from 12:00:00 am to 11:59:59pm UTC AND fall under the criteria specified on the Settings page.
- ▶ Note the following:
  - The custom sync will not run if the difference between the “From” and “To” dates exceed 365 days. If syncing data for multiple years, you may run the Custom Sync multiple times.
  - The custom sync will not run if no date is entered in either field.
- ▶ This is an optional field.

g. **Learning Object Mapping:** This table enables you to specify which Cornerstone learning object (LO) type maps to its corresponding Workday learning type.

- To add an LO mapping, click on the **+ Add Learning Object Type** button.
- Under Cornerstone Learning Object Type, select an LO type. Then, enter its corresponding Workday Training Type ID. Refer to the PREREQUISITE SETUP IN WORKDAY for more details on how to get the Training Type ID.



- To delete an LO mapping, click on the trash icon.
- Note the following:
  - ▶ At least one LO type must be mapped to save the Settings page.
  - ▶ One Cornerstone LO type can be mapped to multiple Workday learning types.
  - ▶ One Workday learning type can be mapped to multiple Cornerstone LO types.

h. **User Exclusion Criteria:** This table allows you to specify users that should be excluded from the integration based on OU ID and/or user custom field value. This is an optional field.

- To add an exclusion criteria, click on **+ Add Learning Object Type** button.
- Under the Criteria Category column, select “OU Type” or “User Custom Field”.
- Under OU Type or User Custom Field column, enter the OU Type name or user custom field label.
- Under the OU ID or User Custom Field Value, enter the OU ID or user custom field value. Any user that belongs to either OU ID and/or custom field value will be excluded from the integration.
- Note that users in child OUs do not get automatically included in the Exclusion Criteria when the parent OU is specified as an exclusion criteria. To exclude users that belong to child OUs, each child OU must be specified in the User Exclusion Criteria mapping table.

8. Click on **Save Settings** which will then take you to the **Manage Integrations** page.

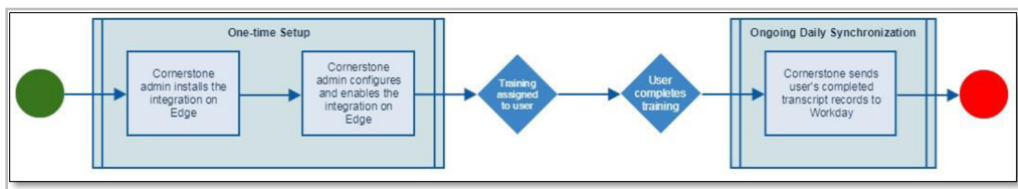
9. Search for **Workday Transcript Outbound** integration and enable the integration by turning on the toggle switch. Upon enablement, the transcript sync will run daily.

a. Note the following:

- First integration sync: all completed transcripts that occurred within the last 24-hour period AND fall under the criteria specified on the Settings page will be included in the sync.
- Subsequent integration sync: all completed transcripts that occurred from the last integration sync (scheduled or on-demand) AND fall under the criteria specified on the Settings page will be included in the sync.

# Workflow

Once enabled in Cornerstone, the integration will run daily at 5:30 AM (based on local time of the data center your portal resides in). The integration will pull all active users' transcript records that were completed within the last 24 hours, apart from those configured to be excluded on the Settings page.



In Workday, the synchronized transcript records are displayed in the worker's profile under View Training.

**View Training**  
Logan McNeil [Actions](#)

Training: HR Fundamentals  
Training Type: Web-based  
Description: (empty)  
Completed On: 04/30/2007  
Training Duration: (empty)  
Entered by: Logan McNeil  
Entered On: 06/05/2007  
Source: Self  
ID: TRAINING-4-5

History 1 item

Date	Action	Training	Training Type	Description	Completed On	Training Duration	Entered by	Source	Status
06/05/2007	Add	HR Fundamentals	Web-based		04/30/2007		Logan McNeil	Self	Successfully Completed



# Appendix

## Field Mapping

ITEM #	WORKDAY FIELD LABEL	CORNERSTONE FIELD LABEL	CORNERSTONE FIELD DESCRIPTION	ADDITIONAL NOTES
1	Employee ID (aka Worker ID) Contingent Worker ID	User ID	User's unique identifier on User Record page.	
2	Training ID	User ID:LOID	LOID = system-generated learning object (LO) identifier	Compound key created in the format <User ID>:<LOID>
3	Training	Title	Title of training user completed	
4	Description	Description	Description of training user completed	
5	Training Type	Learning object type	Learning object type of completed training	Supported LO types: online course, event, session, curriculum, test, external training, material, video
6	Completed On	Completion date	Date and timestamp when user completed the learning object  Time format is extracted in UTC	
7	Duration	Training hours	Training hours of completed training	For duration in decimal form, if GREATER than 30 min, then round up to the nearest hour  For duration in decimal form, if LESS than 30 min, then round down to the nearest hour

# Security Permissions

Permission Name	Permission Description
Edge Marketplace - Manage	Grants access to the Marketplace service for Edge Integrate where the administrator can browse and purchase third-party integrations that can be used to extend the Cornerstone system. This permission cannot be constrained. This is an administrator permission.
Edge Integrations - Manage	Grants access to the Integrations service for Edge Integrate where the administrator can configure, enable, and disable their third-party integrations that are used within the Cornerstone system. This permission cannot be constrained. This is an administrator permission.

## Frequently asked questions

**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: The course description in Cornerstone contains HTML formatting. How will this be loaded in Workday?**

A: The HTML tags in the course description will be sent to Workday. If Workday supports HTML formatting, then the text will be displayed properly. Otherwise, the tags will be displayed in coded format.

**Q: Does the integration handle revoked completed transcripts?**

A: The integration does not support this feature. You can continue to use the existing process by revoking a completed transcript, running a CSOD report to obtain revoked transcripts, EIB into Worday to remove these transcripts.

## Support

- For Cornerstone-related questions or to report issues, please submit a Global Customer Support (GCS) ticket through the Client Success Center.
- For Workday-related questions or to report issues, please submit a ticket with Workday.