



# JDXpert

## Integration with Workday Technical Overview

By Mitch Stephens, President, HRTMS

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## Summary

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- Workday clients can seamlessly integrate with JDXpert using a combination of Web Services and Secure File transfer.
- Job Profiles and Positions can be imported and exported using Workday Web Services. This allows for a real-time exchange of data.
- JDXpert can import Job Profiles and Positions from EIB Workbooks. This allows you to manually export data from Workday and import it into JDXpert.
- JDXpert can export Job Description data in EIB format and these XML workbooks can be imported into Workday manually or by defining a scheduled task.
- Reference Tables in Workday can be downloaded using Web Services and saved as JDXpert Choice Lists. These are essential for data exchange since much of the Workday content is based on Reference IDs.
- Supervisory Organizations and Compensation Grades/Grade Profiles can be downloaded from Workday and key values saved to an Excel Workbook, which can be used in the JDXpert form editor.
- Other objects such as Job Families and Job Classifications can also be downloaded and saved to Excel. These objects may contain more data than just the reference IDs.
- JDXpert can import data by executing Reports-as-a-Service. This allows for customer-defined data structures to be consumed by JDXpert.

## Workday Object Overview

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Workday Object	JDXpert Object
Job Profile	Job Description – usually corresponds to a Parent Job if Workday Position Management is used.
Position	Job Description – usually corresponds to a Child Job. Positions are only relevant when Position Management is used in Workday.
Reference IDs	System Choice Lists, with names matching the Reference Tables in Workday.
Job Family	Job Family
Compensation Group Profile (optional)	Excel Workbook (JD Form Vlookup table)
Compensation Grades (optional)	Excel Workbook (JD Form Vlookup table)
Employee	Employee

## Web API Calls In Use

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Web Service	Function	Usage Notes
Recruiting	Create_Position	Creates a Position in Workday from a Child Job Description in JDXpert. This transaction in Workday may require additional approval steps.
Recruiting	Get_Positions	Download Positions to JDXpert using transaction date range. Positions can be excluded using business rules. Generally, create child jobs from Workday Positions.

Staffing	Edit_Position_Restrictions	This is used to update Positions in Workday. Positions are typically mapped to child jobs in JDXpert and the Job Profiles are typically mapped to Parent Jobs.
Integrations	Get_References	This method is used to import Reference IDs into JDXpert from Workday. Only reference IDs related to Job Profiles and Positions are imported.
Compensation	Get_Compensation_Grades	Used to import Compensation Grades and Grade Profiles to an Excel Workbook structure in JDXpert. This workbook can be used in the JDX Form editor to get Min/Max ranges using Vlookups.
Human_Resources	Get_Job_Families	Used to Import Job Families into JDXpert.
Human_Resources	Get_Job_Classification_Groups	Used to import Job Classification objects into JDXpert. These are converted to an Excel file and used in the Job Description editor.
Human_Resources	Put_Job_Profile	Creates or Updates a Job Profile in Workday. The Job Profile can be based on a parent or independent job in JDXpert. Business rules can restrict this to Update only.
Human_Resources	Get_Job_Profiles	Downloads Job Profiles to JDXpert using date criteria. Job Profiles can be excluded using business rules.
RaaS (Custom Reports)	Varied	JDXpert can execute Reports-as-a-Service to import custom data structures.

## Workday Security Settings

JDXpert will require an 'integration' user account in Workday. This account must be granted a limited set of security rights to execute the Web Services. Below is an example of the security settings in Workday:

← View Integration System Security Group (Unconstrained)

**ISSG\_JDXpert\_JobProfile** (Actions)

Name: ISSG\_JDXpert\_JobProfile

Context Type: Unconstrained

Integration System Users: ISU\_JDXpert /

Domain Security Policy Permissions: 4 items

Operation	Domain Security Policy	Domain Security Policies Inheriting Permission	Functional Areas
Get and Put	Job Information		Jobs & Positions
Get and Put	Job Profile: View		Jobs & Positions
Get Only	Special OX Web Services		Implementation
Get Only	Integration Build		Integration

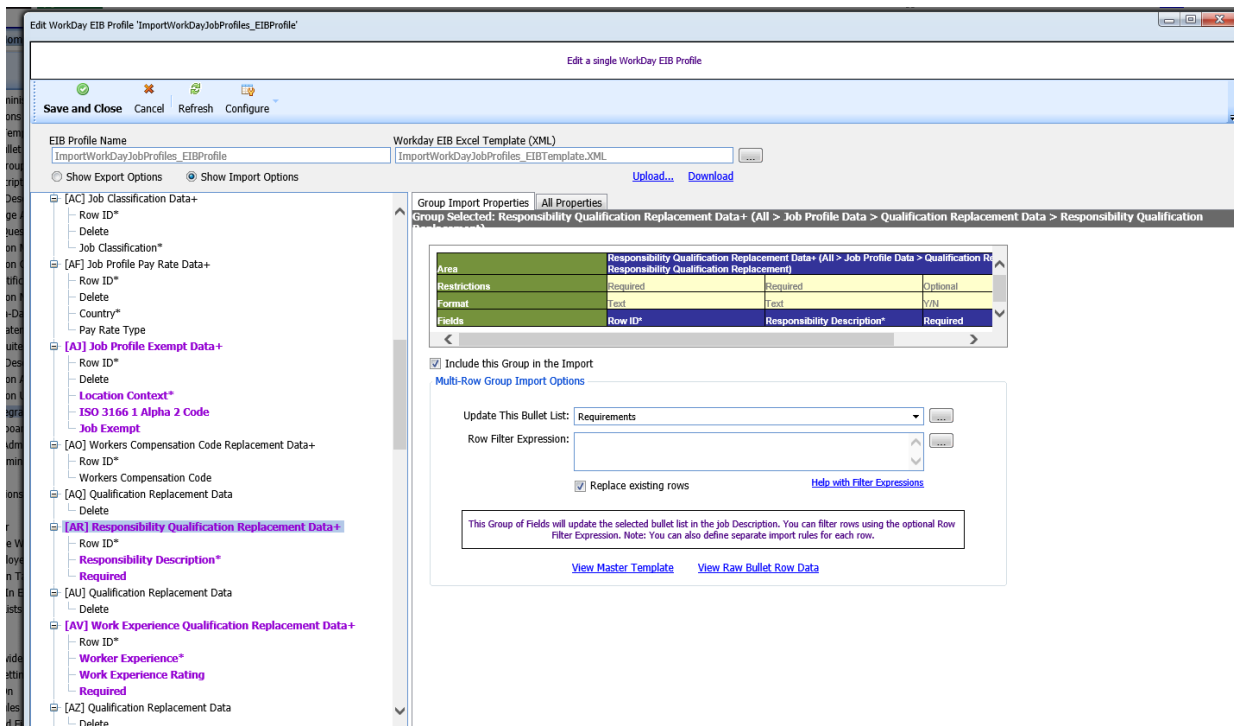
# Recommended Workday Security Settings

Operations	Domain Security	Functional Areas
Get and Put	Job Information	Jobs and Positions
Get and Put	Job Profile View	Jobs and Positions
Get Only	Special OX Web Services	Implementations
Get Only	Integration Build	Integration

## EIB Support

The Workday Enterprise Interface Builder (EIB) tool provides a simple-to-utilize graphical and guided interface to characterize inbound and outbound integrations without requiring any programming. The EIB format is XML that can be viewed and edited using Excel.

JDXpert can export and import EIB-format XML files. JDXpert provides a visual configuration tool to map data elements from JDXpert to the group/field structures in the EIB files. Below is a screenshot of the tool:



Groups of fields in the EIB workbook are displayed in the tree structure on the left of the screen. Groups can be included or excluded from the import or export. The field-level settings allow for complex expressions to convert data to/from JDXpert. For example, you can transform a single-value field such as Job Family, to the multi-value format in the EIB file.

The EIB definitions are also used to map data to the web services.

# Job Profile Download

The Job Profile download tool allows you to import Workday Job Profiles based on a date range. The tool will display the Job Profiles and any matching Job Descriptions:

Job Code	Workday Title	Workday Job Profile Summary	Workday Basic Data	Matching Job Description Name	Job Desc Basic Data
25538	Administrative Aide	Retrieves electronic and paper-based patient records; maintains patient records according to established filing system. Assisting with answering telephones, filing, photocopying, faxing, sorting mail, distributing reports, etc. Working with computer-based document retrieval system of a healthcare facility to locate, print and deliver document and images as requested. Performing clerical and secretarial duties and adhering to file management policies and procedures of the healthcare facility.	Management Level: Individual Contributor Job Level: Intermediate Job Family: Administrative Generalist Compensation Grade: 102	N/A	
26137	Applications Support Analyst	Have an extensive knowledge in a Sanford assigned application. Have a basic knowledge of other Sanford applications. Expected to use analytical skills and experiences to investigate or escalate support issues. Incorporate appropriate presentation techniques to support and/or lead training sessions. Assist in the creation and maintenance of training documentation. Research, analyze and make recommendations for application work flow improvements. Create and analyze reports created using mult.	Management Level: Individual Contributor Job Level: Intermediate Job Family: Applications Programming Compensation Grade: 111	N/A	
25503	LPN Ambulatory	The Licensed Practical Nurse (LPN) will participate in the implementation and evaluation of patient care, under the supervision of a registered nurse, advanced practice provider, or physician. Ensures the health, comfort and safety of patients. Documents a thorough medical history from patient. Contributes to the assessment of patients and administers medications or treatments as ordered. Provides technical support to healthcare professionals as needed. Counseling patients and family members.	Management Level: Individual Contributor Job Level: LPN Job Family: Licensed Practical Nursing Compensation Grade: N104	LPN Ambulatory (25503)	
25501	RN Ambulatory	The Registered Nurse (RN) is responsible for utilizing the nursing process (assessment, diagnosis, outcomes/planning, implementation and evaluation) to provide individualized nursing care to patients. Responsible for the coordination of care, patient assessment, patient education, triage, and various other nursing interventions. Collaborates with other inter-professional colleagues, including physicians, to plan, implement and evaluate care. Demonstrates competency and practices within the full	Management Level: Individual Contributor Job Level: RN Job Family: Registered Nurse Compensation Grade: N107	N/A	
26097	Supervisor, Compensation Admin	Manages a compensation department. Plans, develops and implements or enhances compensation programs, policies and procedures to support organization's goals and competitive practices in healthcare facilities. Advising senior management on pay decisions, policies and processes, and implementing appropriate solutions to specific comp-related programs. Monitoring and optimizing effectiveness of existing compensation practices to ensure they are in line with organizational objectives. Developing	Management Level: Supervisor Job Level: Leadership Job Family: Compensation Compensation Grade: 113	N/A	
42432	Trained Medication Aide, SL2 - AF	To administer and document inhalers, eye drops, ear drops, oral, rectal, and topical medications under the supervision and guidelines of the Charge Nurse. Assist in providing for the residents' physical, mental, spiritual,	Management Level: Individual Contributor Job Level: Patient Support	N/A	

You can preview the Workday Profile:

Workday Job Profile	
<b>Job Code:</b>	25503
<b>Job Title:</b>	LPN Ambulatory
<b>Job Summary:</b>	The Licensed Practical Nurse (LPN) will participate in the implementation and evaluation of patient care, under the supervision of a registered nurse, advanced practice provider, or physician. Ensures the health, comfort and safety of patients. Documents a thorough medical history from patient. Contributes to the assessment of patients and administers medications or treatments as ordered. Provides technical support to healthcare professionals as needed. Counseling patients and family members, under the direction of a registered nurse, on prevention and treatment plans. The LPN demonstrates competency and practices within the full scope of nursing expertise/knowledge and utilizes appropriate age and population specific standards as designated in their assigned clinical setting.
<b>Job Description:</b>	<p>Adheres to legal regulations and organizational policies when discussing patient health information. Communicate relevant information with patients and health team members to ensure quality and continuity of care. Contribute to the evaluation of the plan of care by gathering, observing, recording and communication patient responses to nursing interventions. Establishes and maintains productive working relationships within and outside of own area. Follows safety measures to ensure proper use of equipment and supplies. Implement interventions that are assigned, ordered or prescribed by licensed practitioner or registered nurse. Observe patients, document and report changes in patient condition, such as adverse reactions to medication or treatment, and take any necessary action. Participate and be part of a healthcare team to conduct focused nursing assessments and contribute to the plan of care. Participate in health teaching developed by a licensed practitioner or registered nurse. Promote a safe and therapeutic environment by providing appropriate monitoring and surveillance of the care environment. Responsible for promoting a safe environment for patients, families, staff, residents, and visitors and working collaboratively with the multi-disciplinary health care team to provide the best outcomes for patients.</p>
<b>Management Level:</b>	Individual Contributor
<b>Job Level:</b>	LPN
<b>Job Family:</b>	Licensed Practical Nursing
<b>Compensation Grade:</b>	N104
<b>Job Classification(s):</b>	SWJ3A

You can import the Job Profiles:

Download Workday Job Profiles by date range and advanced filters. You can refresh the JDXpert Job Descriptions from the downloaded profiles

2. Import Job Profiles Configure

Page Range (500 Profiles)  
1 to 25

Show New Profiles  Show Matched Profiles  Use Filters

[View Job Profile](#) [View EIB Workbook](#)

Import Job Profiles

Run Import Profile

Import 88 Workday Job Profiles into JDXpert. This will replace 86 and create 2 new Job Descriptions.

Close Form

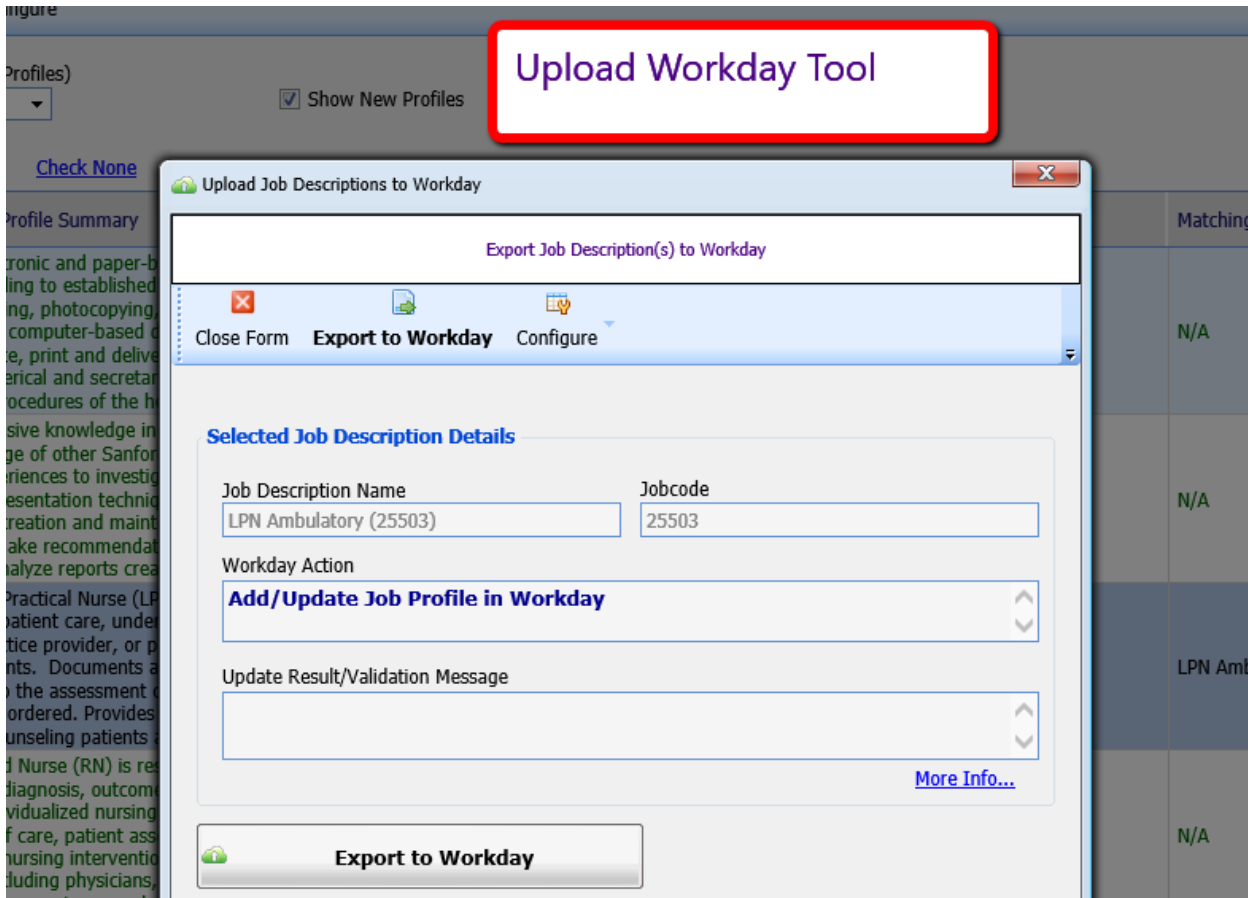
Type of Import:

Select Import Profile:

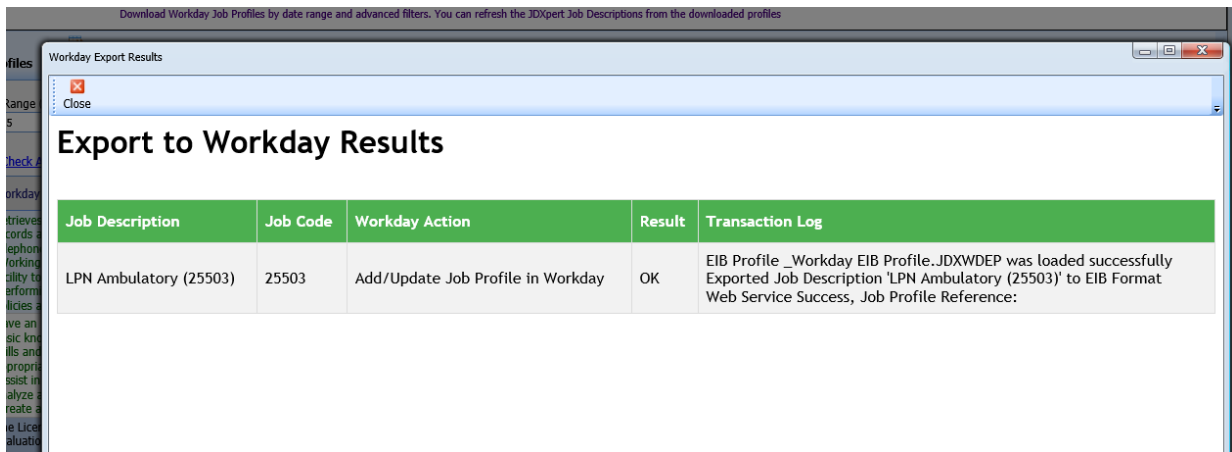
Select Source Workbook: [Upload Excel File](#)

If Position Management is used in Workday, the Job Profiles will generally be downloaded as Parent Job Descriptions in JDXpert. If Position Management is not used, then Job Profiles may be downloaded as independent Job Descriptions or as Parent Jobs, depending on the business requirements. Clients can define which data elements are imported into JDXpert.

You can also export data from JDXpert to Workday Job Profiles and/or Positions:



This tool will also use the EIB profiles to determine how to convert data from JDXpert to Workday structures. Export results are displayed, including any validation errors:





These results are stored in the system as log files and can be viewed using the Workday Log screen:

Workday Web Service Logs

Audit ID	Job Description	Job Code	Audit Type	Action Date	In Error?	Result
25893	LPN Ambulatory (25503)	25503	WEB_SERVICE_WORKDAY	6/29/2018 8:27:52 AM	False	OK
25888	WebAPI Test Job	1200	WEB_SERVICE_WORKDAY	6/28/2018 3:19:27 PM	False	OK
25886	WebAPI Test Job	1200	WEB_SERVICE_WORKDAY	6/28/2018 3:17:46 PM	True	Validation error occurred. Invalid Rich Text internal syntax: Expecting quote at 353
25821	WebAPI Test Job	1200	WEB_SERVICE_WORKDAY	6/27/2018 2:19:51 PM	False	OK

## Batch Operations

The import and export functions described above can be run in batch mode using JDXpert Remote Tasks:

Running Workday Import using JDXpert Remote Tasks

Task Name: Import WorkDay EIB Workbook

Start on: 12:00:00 AM

Server time: 8:31:08 AM

Note: tasks are executed based on server time and not your local time!

Run Once (selected) / Repeat Task

Clear task log before each run (checked) / Save log to a system file

Number of log instances to keep: 30

#	Step Name	Action Type	Enabled	Continue On Error
1	Download from Workday	CustomScript	Yes	No
2	Import To JDX	Importer	Yes	No

Step Options

Step Name: Download from Workday

Step Type: CustomScript

Step Settings

This step will execute a custom script (must be installed by the system administrator).

Custom Script Parameters

Key	Value
NUM_DAYS_START	60
NUM_DAYS_END	0
OUTPUT_FILE	ImportWorkdayJobProfiles.xlsx

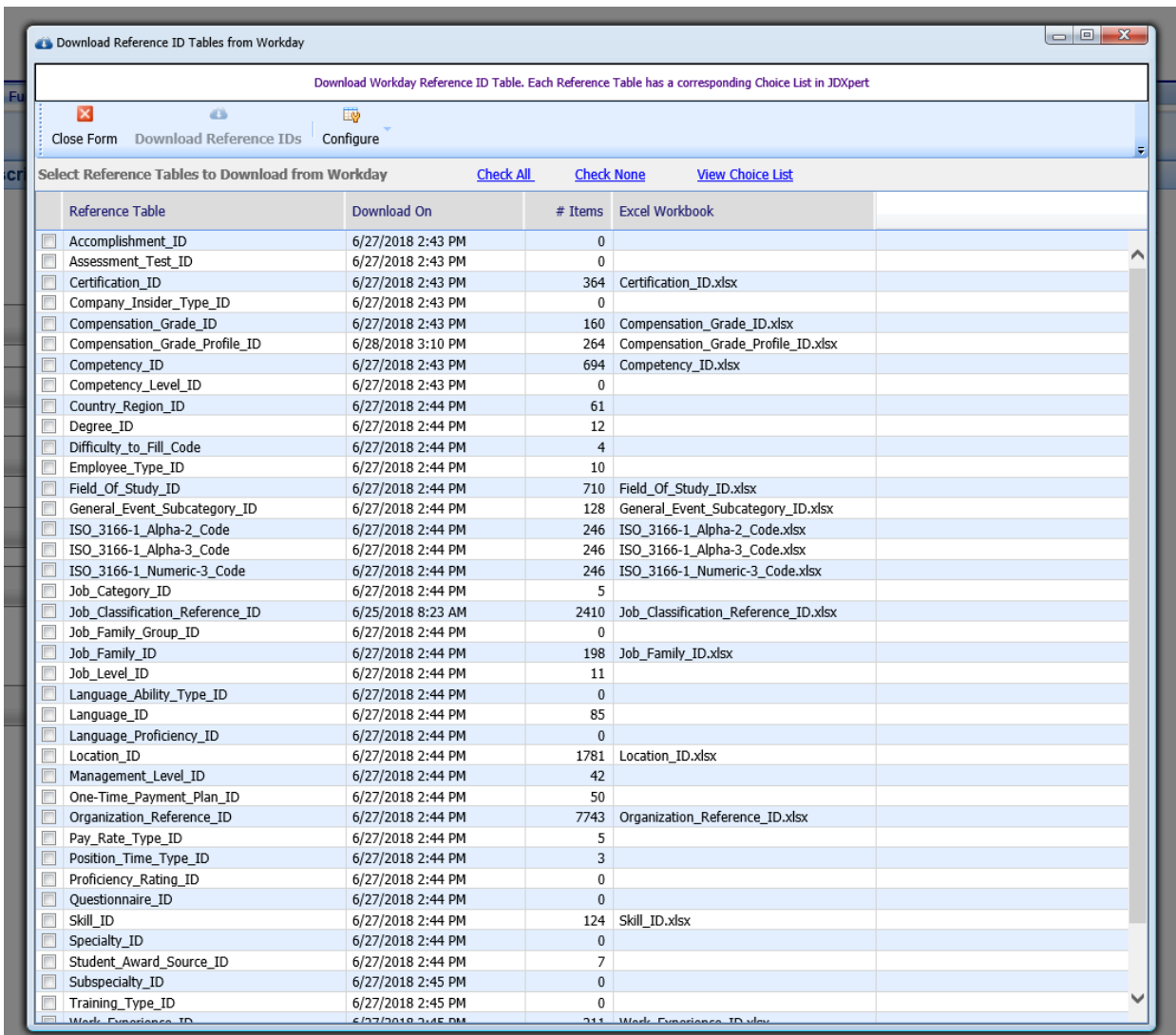
The Web Services step pulls data from Workday and saves it into an Excel Workbook. This workbook is then imported using a standard import profile.

All data are stored for future reference.

## Reference Tables

Since much of the data in Workday is based on Reference IDs, it is important to have matching Choice Lists in JDXpert. This ensures that all data uploaded to Workday will pass validation.

There is an administration tool that lets you re-synch the Reference IDs and create/update system choices lists:



**Note:** The names of the Choice Lists match the names of the Reference Tables in Workday.

If the Reference table has more than 100 records, the system will automatically save the values to an Excel Workbook.

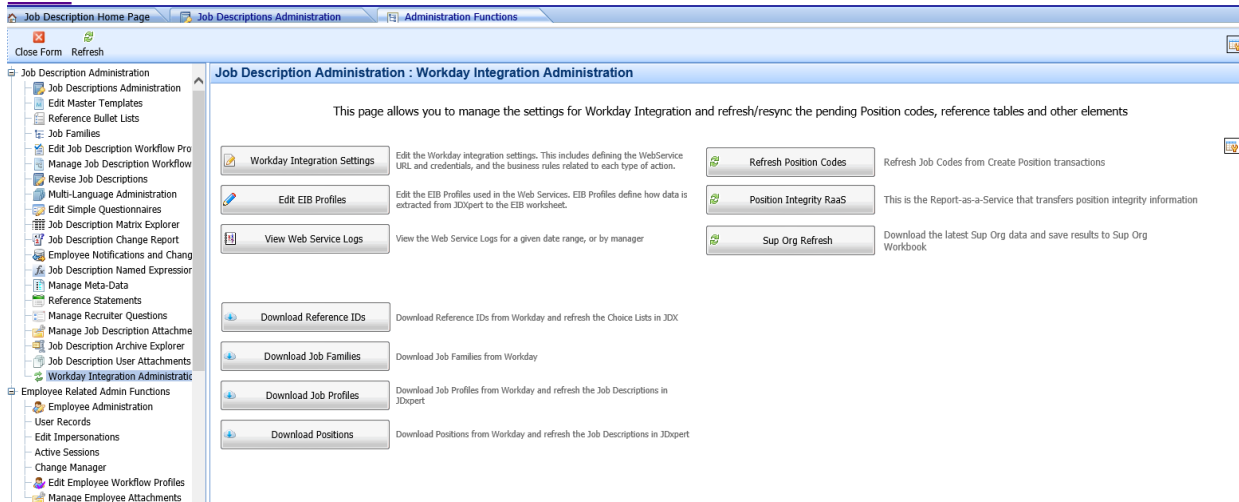
This tool requires access to the 'Get\_References' web service.

# Workday Administration Screen

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All Workday Administration Tasks can be accessed using the Workday Administration Screen in JDXpert. This is usually limited to Admin users.

Below is a screenshot:



# Reports-as-a-Service

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Workday Reports-as-a-Service (RaaS) can be consumed in JDXpert. RaaS support allows clients to export almost any data to JDXpert in real time.

The client must provide the WSDL file for the Report.

The Reports-as-a-Service are implemented using the Job Description Import profile script code.

**Note:** These require custom programming by the JDXpert team.

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