

# Workstation – Workday Integration

## Brief Overview

Workday is an American on-demand (cloud-based) financial management, human capital management, and Student information system software vendor.

Requires admin configuration

This integration requires configuration from your organization's WalkMe admin. <u>If you're the admin, see the Configure an App in Workday for Workstation section of this article for instructions</u>.

## Use Cases

Search for colleagues and access their Workday profile from Workstation.



| Q k     | rel 🛛  | ) | 4 | × 🗉 | +2        | ~       |  |
|---------|--|---|---|-----|-----------|---------|--|
| Showing | 2 results  |   |   |     |           |         |  |
| 8       | Kelsie Cash<br>Automation Tech Lead<br>🎧 Workday • Manager - Zoya Rojas    |   |   | 88  | Tear<br>( | n<br>by |  |
| ~       | <b>Kevin May</b><br>Product Manager<br>🎧 Workday • Manager - Mikolaj Laing | 9 |   |     |           |         |  |
|         |  |   |   |     |           |         |  |
|         |  |   |   |     |           |         |  |

## Organization Chart

- 1. Using the 'Team' button, open the organization chart
- 2. Click on the employees in the chart to display their details, manager, and team members
- 3. Copy or send email



| organization chart       |                    |                    |                      | ,                  |
|--------------------------|--------------------|--------------------|----------------------|--------------------|
|                          |                    | •                  |                      |                    |
| Kelsie Cash              |                    |                    |                      |                    |
| Automation Tech Lead     |                    |                    |                      |                    |
|                          |                    | Zoya               | Rojas                |                    |
|                          |                    | Software           | leam Lead            |                    |
| Location                 |                    |                    |                      |                    |
| IEI AVIV                 |                    |                    |                      |                    |
| Email                    |                    |                    |                      |                    |
| kelsie.cash@brandoli.com |                    |                    |                      |                    |
|                          | Dania Holloway     | Shayan Chamberlain | Kelsie Cash          | Danyaal Coleman    |
|                          | QA Engineer        | Software Developer | Automation Tech Lead | Software Developer |
|                          |                    |                    |                      |                    |
|                          |                    |                    |                      |                    |
|                          | Phebe Riddle       | Zane Santos        | Courtney May         | Usmaan Cortes      |
|                          | Software Developer | Software Engineer  | Software Engineer    | QA Engineer        |
|                          |                    |                    |                      |                    |

## Security Overview

All Workstation requests are protected by a JWT validation.

Read more about Workstation's integration security and Workstation's Enterprise Search.

## Configure an App in Workday for Workstation Search

- 1. Sign in into Workday with an admin access user.
- 2. Search for "Register API Client" in the search bar.





**Register API Client** 

1. Enter the Register API Client task that was found in the search.

Cancel

2. In the Register API Client, start filling the fields according to the following-

| Client Name                                | *   |
|--|---|
| Client Grant Type                          | <ul> <li>Authorization Code Grant</li> <li>Implicit Grant</li> <li>Jwt Bearer Grant</li> <li>SAML Bearer Grant</li> </ul> |
| Support Proof Key for Code Exchange (PKCE) |   |
| Enforce 60 Minute Access Token Expiry      |   |
| Assertion Verification                     | <ul><li>Use Configured IdPs</li><li>Use Certificate (x509 option)</li></ul>   |
|  |   |

Field Value **Client Name** workstation Authorization Code Grant **Client Grant Type** Assertion Verification None of the above Bearer Access Token Type Allow Access to All System Users Yes Redirection URI https://workstation.walkme.com/workday/connected Non-Expiring Refresh Tokens Yes

71 Stevenson Street, Floor 20 San Francisco, CA 94105 | 245 Fifth Avenue, STE 1501 New York, NY, 10016 | 421 Fayetteville St STE 215 Raleigh, NC 27601 www.walkme.com



| Scope (Functional Areas)    | Workday REST API -><br>• Organizations and Roles<br>• Staffing<br>• Time Off and Leave |
|-----------------------------|--|
| Include Workday Owned Scope | Yes  |

- 1. Click **OK** to register the API client.
  - **Don't close the page** after doing so, since the Client Secret is only visible once.
- 2. Copy 5 parameters from this screen -
  - 1. Client ID
  - 2. Client Secret
  - 3. Workday REST API Endpoint
  - 4. Token Endpoint
  - 5. Authorization Endpoint
- 3. Click Done.
- 4. Login to the WalkMe Console to configure the parameters copied from Workday
- 5. To view this API client in the future, search for 'View API Clients' and access that report-

) view api

| ъ | - | a | n |
|---|---|---|---|
|   |   |   | 1 |
|   |   |   |   |
|   | - |   |   |

View API Clients Report

## Installing Workday on Workstation

1. Enable the app in <u>Console</u>.



|    | <b>Wo</b><br>Man | orkstation Dashboard<br>aage and Monitor User Engagement   |   | Invite Co-Workers   |
|----|------------------|--|---|---------------------|
| 53 | •                | Workste  | tion Analytics  |                     |
|    |                  | Daily Active Users How many people are using Workstation every day ⑦ 4 3 2 1 0 6 7 9 7 9 1 9 1 1 1 1 1 1 1 1 1 1 1 1 1 1 | Monthly Active Users How many people are using Workstation every month  4 3 2 1 1 0 Dec  • Installed • Active Users |                     |
|    |                  | Top Content Emission Content Which items users enganged with the most in the last 30 days                                | Top Searches<br>Which topics users have searched for in the last 30 days  | <i>(</i> <b>8</b> ) |