Workday Integration Setup - Client Configuration Steps

Integration System User (ISU)

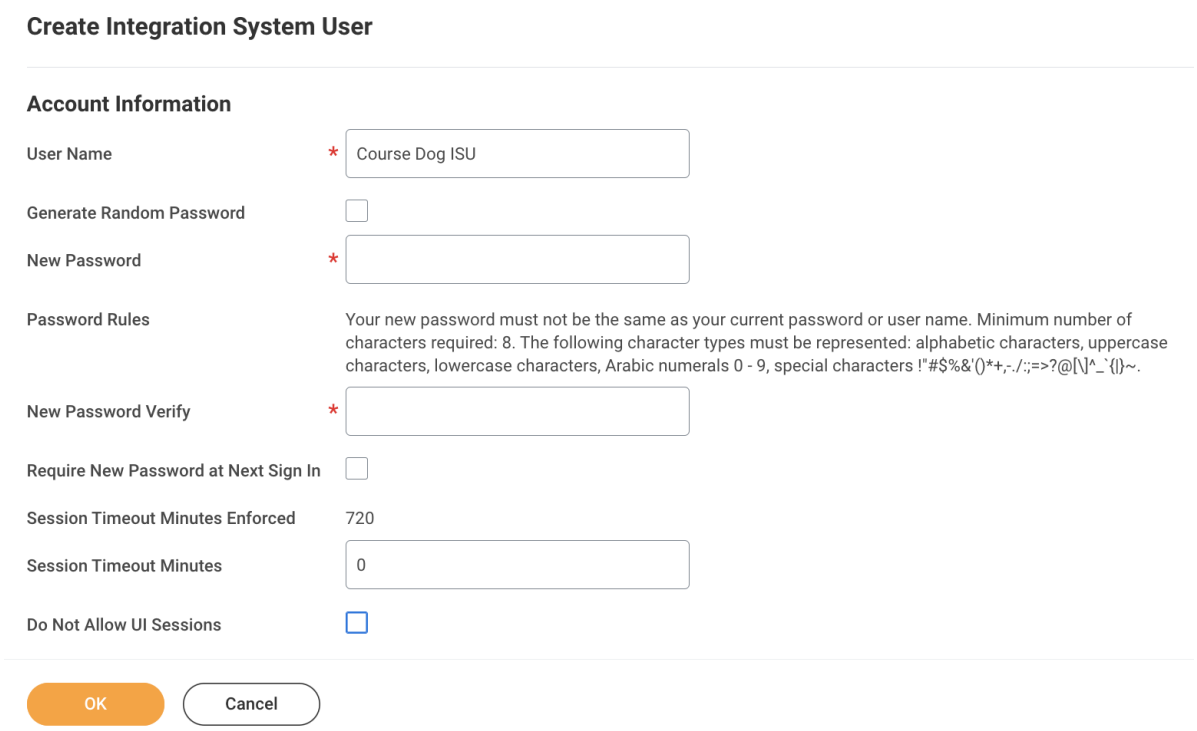
Most integrations in Workday, especially for SOAP based operations, require an Integration System User. This provides a username and password authentication method.

During development, it's not uncommon to allow UI logins, especially when testing RaaS reports since improper security configuration could limit the fields, rows, and data that appear in the report.

However, best practice would state that the “Do Not Allow UI Sessions” is enabled for ISUs, especially in production.

Use this task to create a new ISU called **Course Dog ISU**

▼ Create Integration System User



Managing Password Expiration

Typically, integration system users will be added to the list of users who are exempt from the password expiration policy. This can be configured under the System wide settings task called “Maintain Password Rules”

▼ Maintain Password Rules

Maintain Password Rules

Determine the password restrictions to apply to your system users. These restrictions apply to all system users and are not organization specific.

Password Rules Configuration

Minimum Password Length	*	8
Password Must Contain Alphabetic Characters		☑
Password Must Contain Uppercase Characters		☑
Password Must Contain Lowercase Characters		☑
Password Must Contain Numeric Digits		☑
Password Must Contain Special Characters		☑
Days Before Password May Be Re-used		0
Maximum Password Age in Days		0
Number of Passwords before Password Reuse		0
Failed Signon Attempts Before Lockout	*	5
Number of Failed Password Reset Attempts Allowed		3
Lockout Minutes		10

Session Timeout

Default Session Timeout Minutes * 720

* ◉ Apply to Users with no Individual Session Timeout

○ Override Session Timeout for All Users

System Users exempt from password expiration

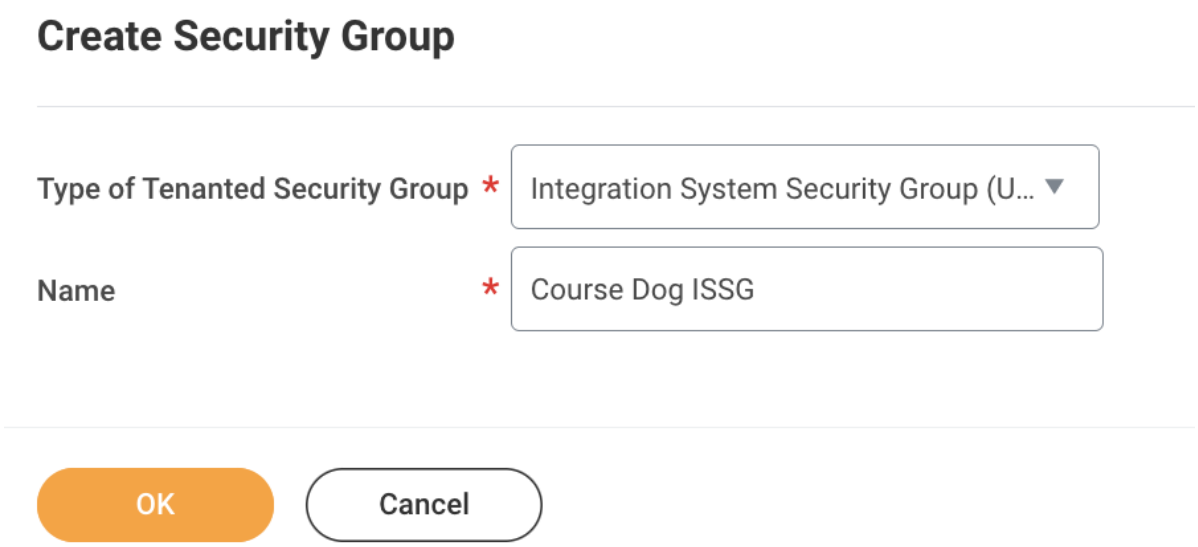
- wd-developer / Developer Generic User
- wd-environments / Workday Production Automation
- wd-support

Integration System Security Group (ISSG)

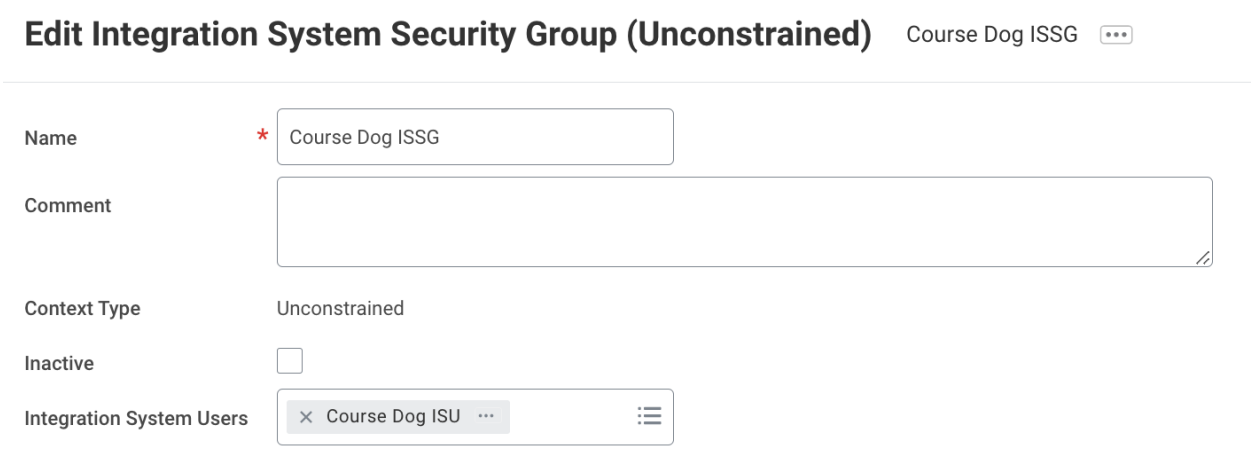
An ISSG is the definition that serves as the conduit to policies that grant access to tasks/reports/operations. The ISU is not given permission directly to a security policy. Instead, the ISSG is assigned to the policy, granting access to the user defined in the ISSG.

User → Security Group → Domain/BP Policies → Tasks/Reports/Operations

1. Create an ISSG



2. Once OK is clicked from Step 1, you can assign the ISU to the ISSG



Security Access to Web Service Operations

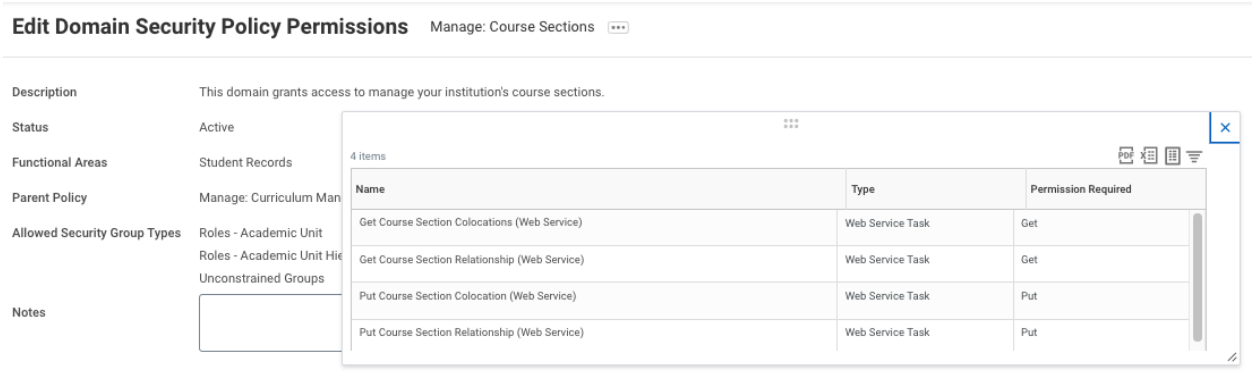
Security access is granted through two mechanisms in Workday:

1. Domain Security Policies
2. Business Process Security Policies
3. Security by Web Service Operation

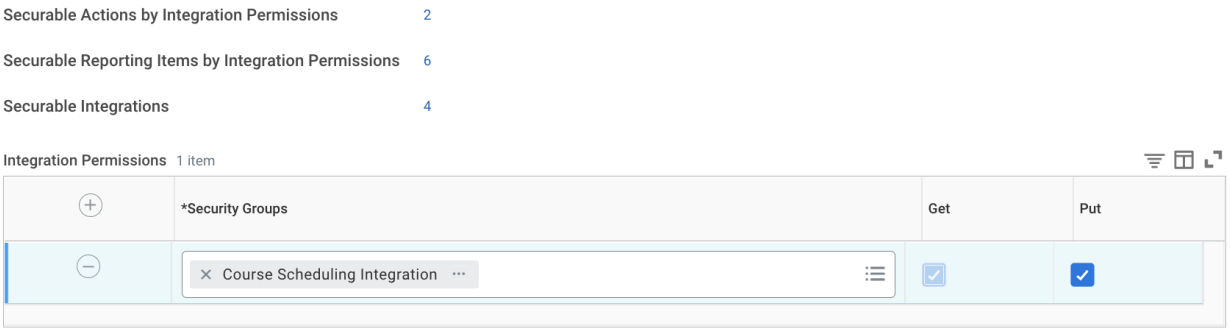
Domain Security Policies

Provides access to data for reporting, tasks, and web service operations that aren't tied to a business process (workflow)

Example below shows the domain security policy named "Manage: Course Section". This policy includes web service tasks that require Get and/or Put permissions on the policy.



Once the domain is identified with the right web service tasks, the security group should then be attached to the Integration portion of the domain policy page:



Business Process Security Policies

Provides access configuration to tasks that kick off workflow in Workday. In some cases, like with Courses and Published Sections, that will include web service operations.

Edit Business Process Security Policy Course Section Event

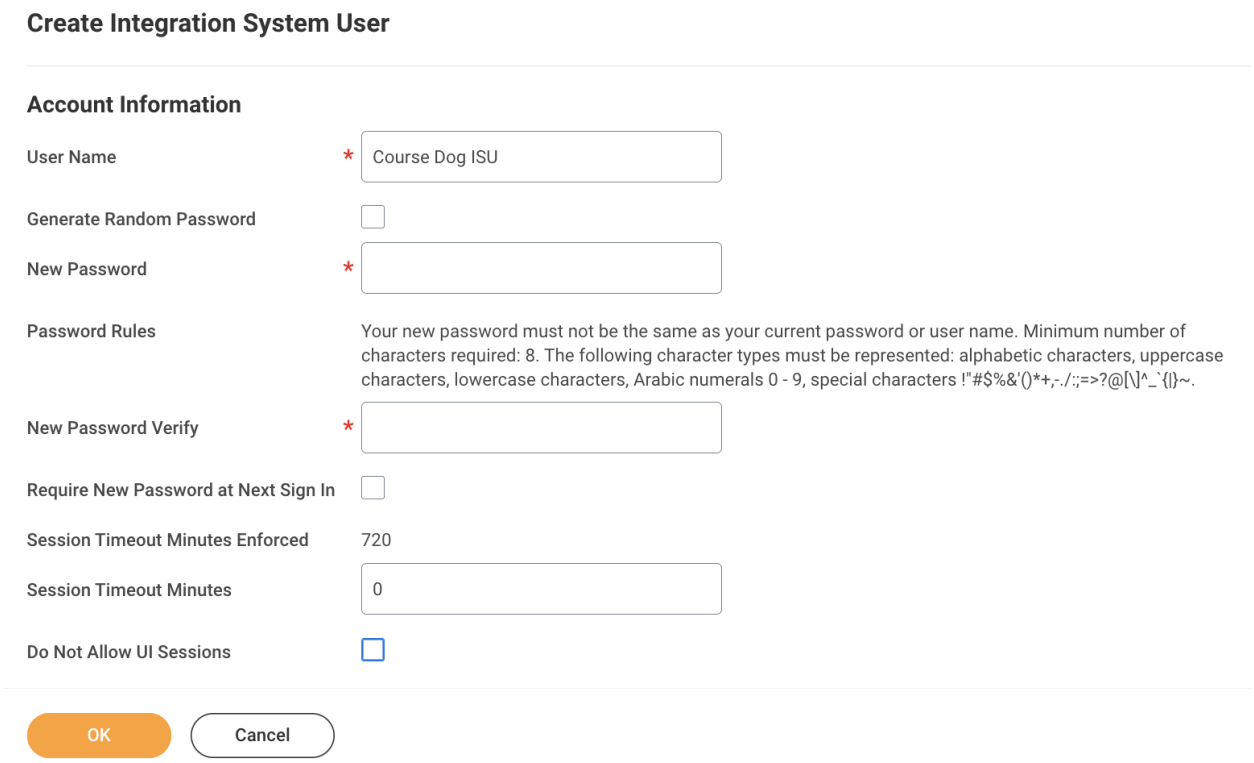
Description	Business Process Type for Student Course Section
Functional Area(s)	Student Records
Security Group Types Allowed for Initiating Actions	Roles - Academic Unit Unconstrained Groups

Who Can Start the Business Process

Initiating Action	Edit Published Course Section
Description	Edit task for a Published Course Section
Security Groups	Implementers Student Administrator Student Records Administrator Student Records Manager

Initiating Action	Maintain Custom Meeting Pattern for Published Course Section
Description	Maintain Custom Meeting Patterns for a Published Course Section
Security Groups	Implementers Student Academic Unit Administrator Student Administrator Student Records Administrator

Initiating Action	Submit Published Course Section (Web Service)
Description	Edit task for published course section
Security Groups	Course Scheduling Integration



Security

This document captures all of the Web Service Operations we will need permissions for:

Workday Web Service Definitions

Additionally, please ensure that password-based authentication is granted. You may need to add our Integration System User to your authentication policy in order to exempt it from SSO.