BlackBerry AtHoc

Workday Sync Module Guide

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Contents

What is the BlackBerry AtHoc Workday Sync Module?

The BlackBerry AtHoc Workday Sync Module is a utility that enables you to synchronize user information from Workday to the BlackBerry AtHoc management system. Synchronization of user contact information with Workday ensures that user information in the BlackBerry AtHoc system is up to date with Workday and critical alerts are delivered to intended users.

Contact BlackBerry AtHoc customer support for the WorkdayIWS and User Sync Client installation files.

Before you can install and run the Workday Sync Module, you must install and set up the BlackBerry AtHoc User Sync Client. For more information, see the *BlackBerry AtHoc User Sync Client Guide*.

Overview

The Workday Sync Module uses the BlackBerry AtHoc User Sync Client to synchronize user data with the BlackBerry AtHoc management system. The Workday Sync Module pulls data from a custom Report-as-a-Service (RaaS) access point and then pushes it to the BlackBerry AtHoc User Sync Client. The BlackBerry AtHoc User Sync Client transfers the user information to the BlackBerry AtHoc management system.

Before you install and use the Workday Sync Module, complete the following:

- Ensure that you have access to a VM or physical computer at the customer site that can host the BlackBerry AtHoc User Sync Client and the Workday Sync Module applications. Coordinate with your IT team to ensure a system is available to host these applications and to schedule their execution using Windows Task Scheduler. You will not need to routinely access the server after the sync is configured.
- Plan the user attributes that you want to synchronize from Workday and what they will translate to in the BlackBerry AtHoc management system. Your BlackBerry AtHoc representative can assist you with adding the attributes to your BlackBerry AtHoc system.
- Communicate with the Workday administrator for your organization and inform them that you will need to create a Workday Custom Report with RaaS access using REST. BlackBerry AtHoc also supports access using WSDL, but REST is more flexible and is preferred.

Software requirements

- BlackBerry AtHoc User Sync Client version 1.1.11.11 or later version.

For more information, see the *BlackBerry AtHoc User Sync Client Guide*.

Install Workday

To install Workday, contact BlackBerry AtHoc customer support to obtain the WorkdayIWS.zip file.

Install Workday: Releases earlier than 1.0.3.0

1. Extract the `WorkdayIWS.zip` file.
2. Copy the `WorkdayIWS.config`, `WorkdayIWS`, and `WorkdayIWS.exe` files to the same location on your local computer where you have the BlackBerry AtHoc User Sync Client installed.

Install Workday: Release 1.0.3.0 or later

1. Create a folder named "Workday" inside the folder where the BlackBerry AtHoc User Sync Client is installed. The `AtHocDataIntegrator.exe` and the Workday folder must be in the same parent folder.
2. Unzip the `Workday.zip` file and then copy all files and the bin folder to the new Workday folder.

Configure Workday

To configure Workday, first create a Workday custom report to define the user attributes that you want to synchronize from Workday to BlackBerry AtHoc. The Workday Sync Module supports Web Services Definition Language (WSDL) and REST-based access to Workday custom reports. REST is preferred. After creating the Workday custom report, obtain RaaS access for WSDL or REST, and configure security settings.

Create a Workday custom report

Create a Workday custom report to define the user attributes that you want to synchronize from Workday to BlackBerry AtHoc.

The Workday Sync Module supports Web Services Definition Language (WSDL) and REST-based access to Workday custom reports. REST is preferred.

Before you begin:

- You must have login credentials to: https://community.workday.com/shared-tenants.
- You must have permissions to create custom reports in Workday.

1. Log in to the Workday tenant.
2. Go to the **Tenant for Community Users** page.
3. Click *<tenant-name>* **Sign In**.
4. On the **Community** page, click **sign in as** *<user-with-report-creation-permissions>*.
5. Click **I agree to the terms of use for this shared tenant**.
6. In the **Search** field, type **Create custom report**.
7. Click the **Create Custom Report** task.
8. On the **Create Custom Report** page, in the **Report Name** field, enter a report name.
9. In the **Report Type** field, select **Advanced**.
10. In the **Data Source** search field, search for and select the data source where the necessary data can be fetched and synced to BlackBerry AtHoc. For example, "Workers."
11. Select the **Optimized for Performance** option.
12. Select the **Enable As Web Service** option.
13. Click **OK**.
14. On the report details page, in the **Additional Info** section, click **Columns**.
15. Click **+** to add a column tab. Each column tab is a report field in the custom report.
16. On the **Search Results** window, enter the name of the field you want to add to the report.
17. Select the name of the field from the search results window.
18. Press **Enter**.
19. Repeat Steps 16 to 18 for each field you want to add to the report.
20. Click **OK**.
21. Note the values in the **Column Heading override XML Alias** column for each added field. These values are used in the `WorkdayIWS.config` file to map Workday fields.
22. Optionally, if an error appears, click **Error**.
23. Review the **Error** screen and correct any fields in the custom report.
24. In the **Additional Info** section, click **Prompts** to add the required prompt fields.
25. In the **Prompt Defaults** section, click **Populate Undefined Prompt Defaults**.

26. Click **OK**.

27. Optionally, if an error appears, click **Error**.

28. Review the **Error** screen and add any additional required prompt fields that are displayed.

29. Click **OK**.

The custom report is configured and you are redirected to the custom report field page.

Obtain Report-as-a-Service (RaaS) access

Report-as-a-Service (RaaS) allows access to Workday custom reports as web services. When you enable a Workday custom report as a web service, the report results can be accessed through URLs.

1. Log in to the Workday tenant.

2. In the **Search** field, type **View custom report**.

3. On the **View Custom Report** screen, click **My Reports**.

4. Select the report you want to view.

5. Click **OK**.

6. On the **View Custom Report** page, click **Actions** > **Web Service** > **View URLs**.

7. Click **OK**.

8. For WSDL, on the **View URLs Web Service** page, in the **WSDL** section, right-click **WSDL**, then select **Copy URL**.

9. For REST, on the **View URLs Web Service** page, in the **JSON** section, right-click **JSON**, then select **Copy URL**.

After you finish:

- To access the Workday custom report using WSDL, set up security for a WSDL configuration.
- To access the Workday custom report using REST, set up security for a REST configuration.

Set up security for a WSDL integration

Complete this task if you want to access Workday custom reports using the WSDL service. WSDL is a SOAP-based service that can be used to define integrations from external applications that need to access Workday custom reports. To access Workday custom reports using REST, see Set up security for a REST integration.

Note: REST provides more flexibility and is the preferred service.

Before you begin:

- Create a Workday custom report
- Obtain Report-as-a-Service (RaaS) access

1. Log in to the Workday tenant.

2. In the **Search** field, type **Create Integration System User**.

3. Select the **Create Integration System User** task.

4. On the **Create Integration System User** page, in the **Account Information** section, enter a user name, and enter and confirm a password.

5. Click **OK**.

6. In the **Search** field, type **Create Security Group**.

7. Select the **Create Security Group** task.

8. Click **OK**.

9. On the **Create Security Group** page, from the **Type of Tenanted Security Group** pull-down menu, select **Integration System Security Group**.

10. In the **Name** field, enter a name.

11. Click **OK**.

12. On the **Edit Integration System Security Group (Unconstrained)** page, in the **Name** field, enter the same name you entered in Step 4.

13. Click **OK**.

14. Click **Actions** > **Security Group** > **Maintain Security Permissions**.

15. Click **Done**.

16. On the **Maintain Permissions for Security Group** page, in the **Integration Permissions** section, in the **Domain Security Policies permitting Get access** search field, type **Domain Security Policy**.

17. Select all search results and click **OK**.

18. On the Workday home page, in the **Search** field, type **integration security**.

19. From the search results, click the **Integration System User Security Configuration** report.

20. On the **Integration System User Security Configuration** page, select the username you entered in Step 12.

21. Click **Security Profile** > **Assign Integration System Security Groups**.

22. On the **Assign Integration System Security Groups** page, in the **Integration System Security Groups to Assign** field, type **ISSG Worker Details**.

23. Click **Enter**.

24. Click **ISSG Worker Details**.

25. Click **OK**.

26. On the **Assign Integration System Security Groups** page, click **ISSG Worker Details**.

27. On the Workday home page, in the **Search** field, type **View Custom Report**.

28. In the **Custom Report** field, enter the name of the custom report.

29. Select the report from the search results.

30. Click **OK**.

31. On the report summary screen, click **Action** > **Custom Report** > **Edit**.

32. In the **Additional Info** section, click **Share**.

33. In the **Report Definition Sharing Options** section, select the **Share with specific authorized groups and users** option.

34. In the **Authorized Users** field, enter the created integration system user name you entered in Step 4.

35. Click **Enter**.

36. Click **OK**.

After you finish: Use the values generated for the "WDusername" and "WDpassword" keys to configure the Workday Sync Module for WSDL.

Set up security for a REST integration

Complete this task to access Workday custom reports using REST. To access Workday custom reports using WSDL, see Set up security for a WSDL integration. REST is the preferred method.

Before you begin:

- Create a Workday custom report
- Obtain Report-as-a-Service (RaaS) access

Copy the token endpoint URL

The token endpoint URL is needed to provision REST to access Workday custom reports.

1. Log in to the Workday tenant.
2. In the **Search** field, type **View API Client**.
3. Select the **View API Clients** task.
4. On the **View API Clients** page, copy the URL in the **Token Endpoint** field.

After you finish: Save the copied URL to Configure the Workday Sync Module for REST.

Copy the client ID and client secret

The client ID and client secret are needed to provision REST to access Workday custom reports.

1. Log in to the Workday tenant.
2. In the **Search** field, type **Register api client for integrations**.
3. Select the **Register API Client for integrations** task.
4. On the **Register API client for Integrations** page, in the **Client Name** field, enter the client name.
5. Select the **Non-Expiring Refresh Tokens** option.
6. In the **Scope (Functional Areas)** field, select **Tenant Non-Configurable**.
7. Click **OK**.
   The client ID and client secret are displayed.
8. Copy the **Client Secret** and **Client ID**.
9. Click **Done**.

After you finish: Save the copied client secret and client ID to Configure the Workday Sync Module for REST.

Generate a non-expiring refresh token

The non-expiring refresh token is needed to provision REST to access Workday custom reports.

1. Log in to Workday
2. In the **Search** field, type **View API client**.
3. Select the **View API Clients** task.
4. On the **View API Clients** page, click the **API Clients for Integrations** tab.
5. Click the client you created in Copy the client ID and client secret.
6. Click **API Client** > **Manage Refresh Tokens for Integrations**.
7. On the **Manage Refresh Tokens for Integrations** page, in the **Workday Account** field, enter the Workday account of a user who has access to the custom report.
   Set up the user as a service account instead of an actual Workday user to prevent permissions being removed from the account due to a job change.
8. Click **OK**.
9. Return to the Workday home page.
10. In the **Search** field, type **Register api client for integration**.
11. On the **Delete or Regenerate Refresh Token** page, select the **Generate New Refresh Token** option.
12. Click **OK**.
13. On the **Successfully Regenerated Refresh Token Page**, copy the refresh token.
14. Click **Done**.

After you finish: Save the copied refresh token to Configure the Workday Sync Module for REST.

Configure the Workday Sync Module

Configure the Workday Sync Module to be able to import Workday data into a .csv file and then trigger a user sync between Workday and BlackBerry AtHoc.

Before you begin:

- Install and configure the BlackBerry AtHoc User Sync Client. For more information, see the *BlackBerry AtHoc User Sync Client Guide*. The User Sync Client must have a valid configuration and be able to process .csv files. In the `AtHocDataIntegration.config` file verify the following:
    - If you are running the BlackBerry AtHoc User Sync Client for the first time, encrypt sensitive data such as <password> and <clientsecret>, by setting the value of the <isEncrypted> attribute in the `AtHocDataIntegration.config` file to false and running the user sync client twice.
    - Verify that the <readFolder>, <processedFolder> and <csvColumns> attributes are specified in the <dataAdapter> attribute.
    - If the .csv file in the <readFolder> path contains sensitive data, place it into the <processedFolder>.
- Install Workday.
- Create a Workday custom report.
- Obtain Report-as-a-Service (RaaS) access.
- Set up security for a REST integration or Set up security for a WSDL integration.

1. Open the `WorkdayIWS.config` file using Notepad.
2. Configure the <configurations> node for either WSDL or REST:

    - Configure the Workday Sync Module for WSDL.
    - Configure the Workday Sync Module for REST.
3. Configure encryption for sensitive data.
4. Run the WorkdayIWS application.

Configure the Workday Sync Module for WSDL

Complete this task to build a SOAP-based web service integration using WSDL to access Workday custom reports.

Note: The BlackBerry AtHoc Workday Sync Module supports WSDL, but REST is preferred.

Before you begin:

- Obtain Report-as-a-Service (RaaS) access
- Set up security for a WSDL integration

1. Open the `WorkdayIWS.config` file.
2. Get the value of the <isEncrypted> attribute to **false**.
3. Update the value of the <ReportServiceType> attribute to **WSDL**.
4. Update the following values in the **Web service endpoint and credential** section:

    - WDURL: Endpoint URL.
    - WDusername: Username
    - WDpassword: Password

```
<!--Web service endpoint and credential-->
<add key="WDURL" value="https://wd3-impl-services1.workday.com/ccx/service/
customreport2/bb_preview/AthocAlert_ISU/Athoc_Alert_Test?wsdl" />
```

```
<add key="WDusername" value="workday-username" />
<add key="WDpassword" value="workday-password" />
```

If present in the WDURL, escape characters (&, <, >,",') must be rewritten as follows:

- Replace **&** (ampersand) with **&**
- Replace **<** (less than) with **<**
- Replace **>** (greater than) with **>**
- Replace **"** (quotes) with **&quots;**
- Replace **'** (apostrophe) with **'**

5. In the **CSV folder path** section, update the CsvFilePath value with the location where you want to store the .csv file.

```
<!--CSV folder path-->
<add key="CsvFilePath" value="C:\tmp\"
```

The value of the CsvFilePath in the `WorkdayIWS.config` file must match the value in the <readFolder> attribute in the `AtHocDataIntegration.config` file.

6. Set the value of the TriggerUserSyncTool key to "true" or "false."

If the value is set to "true" the Workday Sync Module imports data from Workday to a .csv file and then triggers the BlackBerry AtHoc User Sync Client to synchronize the data from the .csv file into BlackBerry AtHoc. If the value is set to "false" the Workday Sync Module imports the user data from Workday into a .csv file but does not trigger the BlackBerry AtHoc User Sync Client.

```
<!-- SET  TriggerUserSyncTool Value as "true" to trigger User Sync Tool -->
<!-- SET  TriggerUserSyncTool Value as "false" to disable automatic trigger and
 check if CSV is getting created -->
<add key="TriggerUserSyncTool" value="true" />
```

7. In the **Import only selected fields** section, enter the Workday fields whose data you want to import into a .csv file. Separate each field with a comma.

```
<!--Import only selected fields-->
<add key="SyncConfiguredFields"
 value="PublicEmailAddresses,FirstName,LastName" />
```

8. In the **CSV "Username" column mapping with workday field** section, enter the name of a column in the .csv file that you want to map to a Workday data field. In the following example, the "PublicEmailAddresses" data field in Workday is mapped to the "username" column in the .csv file:

```
<!--CSV "Username" column mapping with workday field -->
<add key="UsernameMapping" value="PublicEmailAddresses" />
```

The .csv file must have a "username" column in order for the BlackBerry AtHoc User Sync Client to synchronize Workday user data to BlackBerry AtHoc.

BlackBerry AtHoc requires a minimum of 4 characters in the username. The data in the username column must have a minimum of 4 characters for the BlackBerry AtHoc User Sync Client to synchronize user data to BlackBerry AtHoc.

9. Optionally, in the **Specify date fields and format workday field** section, update the values of the "DateTypeFields" and "DateFormatSupported" keys to specify the date fields and date format for the .csv file.

```
<!--Specify date fields and format workday field -->
<add key="DateTypeFields" value="Last_Hire_Date,Term_Date" />
<add key="DateFormatSupported" value="dd-MM-yyyy" />
```

10. Save and close the file.

Configure the Workday Sync Module for REST

Complete this task to configure the BlackBerry AtHoc Workday Sync Module to access Workday custom reports using REST.

Before you begin:

- Obtain Report-as-a-Service (RaaS) access
- Set up security for a REST integration

1. Open the `WorkdayIWS.config` file.
2. Set the value of the <isEncrypted> attribute to **false**.
3. Update the value of the <ReportServiceType> attribute to **REST**.
4. Update the values for the following attributes in the **REST - Get report as REST service** section with the values generated by completing the tasks in the Set up security for a REST integration section:
   a) TokenEndpoint
   b) ClientId
   c) ClientSecret
   d) NonExpiringRefreshToken

```
<add key="TokenEndpoint" value="token-endpoint-url" />
<add key="ClientId" value="client-id" />
<add key="ClientSecret" value="client-secret" />
<add key="NonExpiringRefreshToken" value="non-expiring-refresh-token" />
```

5. Update the WDURL value in the **Report service URL** section with the value generated by completing the Obtain Report-as-a-Service (RaaS) access task.

```
<!--Report service URL-->
<add key="WDURL" value="web-service-URL" />
```

You should avoid including parameters in the WDURL. Parameters can be included, if required.

Example of a WDURL without parameters. This is the recommended format:

```
https://sharedgmspreview.workdaysuv.com/ccx/service/customreport2/gms/tserrano/
TestCustomReport
```

Example of a WDURL with parameters:

```
https://sharedgmspreview.workdaysuv.com/ccx/service/customreport2/gms/tserrano/
TestCustomReport*?Include_Subordinate_Organizations=0&Is_Active=0&format=json*
```

In the example with parameters, remove the bold portion of the URL for best results. If any escape characters (&, <, >,",') are present in the WDURL, they must be rewritten as follows:

- Replace **&** (ampersand) with **&**
- Replace **<** (less than) with **<**
- Replace **>** (greater than) with **>**
- Replace **"** (quotes) with **&quots;**
- Replace **'** (apostrophe) with **'**

6. In the **Web service credential** section, leave a blank space for the WDusername and values:

```
<!--Web service credential-->
<add key="WDusername" value=" " />
<add key="WDpassword" value=" " />
```

7. In the **CSV folder path** section, update the values of the CsvFilePath key with the location where you want to store the .csv file.

```
<!--CSV folder path-->
<add key="CsvFilePath" value="C:\tmp\"
```

The value of the CsvFilePath in the `Workday.exe.config` file must match the value in the <readFolder> attribute in the User Sync Client `AtHocDataIntegration.config` file.

8. In the **SET TriggerUserSyncTool Value...** section, update the value of the TriggerUserSyncTool key to **true** or **false**.

If the value is set to true, the Workday Sync Module imports data from Workday to a .csv file and then triggers the BlackBerry AtHoc User Sync Client to synchronize the data from the .csv file into BlackBerry AtHoc. If the value is set to "false" the Workday Sync Module imports the user data from Workday into a .csv file but does not trigger the BlackBerry AtHoc User Sync Client.

```
<!-- SET  TriggerUserSyncTool Value as "true" to trigger User Sync Tool -->
<!-- SET  TriggerUserSyncTool Value as "false" to disable automatic trigger and
 check if CSV is getting created -->
<add key="TriggerUserSyncTool" value="true" />
```

9. In the **Import only selected fields** section, update the value of the SyncConfiguredFields key with the Workday fields whose data you want to import into a .csv file. Separate each field with a comma.

```
<!--Import only selected fields-->
<add key="SyncConfiguredFields"
 value="PublicEmailAddresses,FirstName,LastName" />
```

10. In the **CSV "Username" column mapping with workday field** section, enter the name of a column in the .csv file that you want to map to a Workday data field. In the following example, the "PublicEmailAddresses" data field in Workday is mapped to the "username" column in the .csv file:

```
<!--CSV "Username" column mapping with workday field -->
<add key="UsernameMapping" value="PublicEmailAddresses" />
```

The .csv file must have a "username" column for the BlackBerry AtHoc User Sync Client to synchronize Workday user data to BlackBerry AtHoc.

The Username field must have a minimum of 4 characters for the BlackBerry AtHoc User Sync Client to synchronize user data to BlackBerry AtHoc.

11. Optionally, in the **Specify date fields and format workday field** section, update the values of the "DateTypeFields" line with all date attributes. Modify the "DateFormatSupported" value to match the format required by the BlackBerry AtHoc User Sync Client.

```
<!--Specify date fields and format workday field -->
<add key="DateTypeFields" value="Last_Hire_Date,Term_Date" />
<add key="DateFormatSupported" value="dd-MM-yyyy" />
```

12. Save and close the file.

Configure encryption for sensitive data

The first time the Workday Sync Client runs, sensitive data such as username, password, client ID and client secret are encrypted.

If the report service type is WSDL, the username and password are encrypted. If the report service type is REST, the client ID, client secret, and the non-expiring refresh token are encrypted.

Before you begin:

- The Workday Sync Module must be installed and configured.

1. On your local computer, navigate to the following directory: **LocalDisk(C:)** > **Program Files(x86)** > **BlackBerry** > **AtHoc User Sync Client** > **bin**.
2. Open the **bin** folder.
3. Verify that the AtHoc.Bootstrap32.dll and AtHocBootstrap64.dll files appear.
4. On your local computer, navigate to the following directory: **LocalDisk(C:)** > **Program Files(x86)** > **BlackBerry** > **AtHoc User Sync Client**.
5. Open the `WorkdayIWS` XML Configuration file.
6. Update the value of the <ReportServiceType> attribute to **WSDL** or **REST**.
7. Complete one of the following:
   a) For **WSDL**, enter clear-text values for the WDUsername and WDpassword keys.
   b) For **REST**, enter clear-text values for the client ID, client secret, and the non-expiring refresh token.
8. Update the value of the <isEncrypted> node to **false**.
9. Run the `WorkdayIWS` utility to encrypt the configuration and create a .csv file.

Create a Windows Task Scheduler

You can create a Windows Task Scheduler on your local computer to run the Workday Sync Module automatically as a background task.

1. On your local computer, click **Start**.
2. Search for **Task Scheduler**.
3. Click **Enter**.
4. On the **Microsoft Management Console** window, click **Yes**.
5. On the **Task Scheduler** window, in the **Actions** panel, click **Create Task**.
6. On the **Create Task** window, enter a name for the task in the **Name** field. For example, WorkdayUtility.
7. Click the **Actions** tab.
8. Click **New...**.
9. On the **New Action** window, click **Browse...** in the **Settings** section.
10. Navigate to the location on your local computer where you installed the **WorkdayIWS** application.
11. Select the **WorkdayIWS** application.
12. Click **Open**.
13. On the **New Action** window, click **OK**.
14. On the **Create Task** window, click the **Triggers** tab.
15. Click **New...**.

16. On the **New Trigger** window, in the **Settings** section, select the schedule option. Options are One Time, Daily, Weekly, or Monthly.

17. Optionally, select options in the **Advanced settings** section.

18. Click **OK**.

The Workday Sync Module synchronizes user data between Workday and BlackBerry AtHoc on the configured schedule.

Working with the WorkdayIWS.config file

If you update any of the following attributes, you must also update the <isEncrypted> attribute:

- For REST: client ID, client secret, or non-expiring refresh token
- For WSDL: username or password

When using the REST report service, the client ID, client secret, and non-expiring refresh token are encrypted. When using WSDL, the username and password are encrypted.

1. Open the `WorkdayIWS.config` file using Notepad.
2. Do one of the following:

    - For non-sensitive data such as WDURL or <SyncConfiguredFields>: modify the configuration details and save the file.
    - For sensitive data, set the <isEncrypted> attribute to **false**. For the REST report service type, enter the client ID, client secret, and the non-expiring refresh token in clear text. For WSDL, enter the values for username and password in clear text.

    All sensitive data for a report service type must be re-entered in clear text when any sensitive data for that report service type is modified.

3. Save the `WorkdayIWS.config` file.

Upgrade Workday

1. Back up all Workday files. Take note of the location of your back up of the `WorkdayIWS.config` file. You will need this file during the upgrade.
2. Delete all Workday build files.
3. Obtain a copy of the latest Workday build .zip file.
4. Create a folder named "Workday" inside the folder where the BlackBerry AtHoc User Sync Client is installed. The `AtHocDataIntegrator.exe` and the Workday folder must be in the same parent folder.
5. Copy all files and the bin folder in the `Workday.zip` file to the new Workday folder.
6. Replace the `WorkdayIWS.config` in the Workday folder with the `WorkdayIWS.config` file from your backup.

BlackBerry AtHoc Customer Support Portal

BlackBerry AtHoc customers can obtain more information about BlackBerry AtHoc products or get answers to questions about their BlackBerry AtHoc systems through the Customer Support Portal:

https://support.athoc.com

The BlackBerry AtHoc Customer Support Portal also provides support via computer-based training, operator checklists, best practice resources, reference manuals, and user guides.

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