Workday Integrations: Overview & Lessons Learned

Speakers: Steve Allen
Kevin Kane

NERCOMP
NorthEast Regional Computing Program

Introductions

* Steve Allen
  Integrations Lead @ Suffolk University
  October 22, 2023: Student Module go-live
  Previously involved in 4 Workday Implementations

* Kevin Kane
  Director of Enterprise Systems @ Wesleyan University
  Currently implementing Workday HCM/Finance target go live: July 1, 2024

Polling Questions

* Where are you in your Workday implementation journey?

* Do you have an IPaaS? If so, which one?

* Have you conducted a Workday integration previously?

* Which Workday Modules are you implementing? HCM, Finance, or Student

Integration Landscape

* Jobs, tasks, programs that keep your systems synchronized

* SAAS model has increased the number of systems that institutions _need_ to run their business

* Many are simple single source to single destination

* Example:

Workday Integration Toolkit

* Cloud Connect
* EIB (Enterprise Interface Builder)
* BIRT (Business Intelligence and Reporting Tools)
* RAAS (Report as a Service)
* Studio

IPaaS: Integration Platform as a Service

* Why?
* What are they good at?
* Can you do Workday without one?
* Examples:

Key Decisions

* Integration Inventory

* Employee Skillset Review

* Training

* IPAAS or not?

Integrations Inventory

* Must Have
    * Comprehensive list of all integrations
    * Updated vendor and functional contact information
    * Integration type (SFTP, API, SOAP/XML, etc)
    * Basic run information like frequency and timing
    * Determine if its needed after ERP switch or not
    * Last / First Run dates (handover from old to new ERP)
* Nice to have
    * Sample integration files
    * Original Vendor documentation

Preparing: 12 Months out

* Adopt an IPAAS – become proficient in it, take this time to redo poorly documented or fragile integrations, this doubles as both training and reducing technical debt.

* Hire/train/retain the necessary talent: *Assess Your Staff*

Assessing Your Staff

* Assess your staff:
  * Identify skill gaps
    * BA/SQL Developer to an Integrations Expert
    * Tabular view of data to object oriented
  * Create a training plan
  * Realistic assessment of how much of the integrations workload your staff can take on

Workday Training Path

* Core skill for integrations is report writing

* XSLT and Document Transformation for outbound

* EIB focus for inbound

* Workday Studio for complex custom integrations

Workday Pro Connectors and Document Transformation
7 credits total | Each track requires an exam fee of 1 training credit

Report Writer	Calculated Fields	Workday Integration System Fundamentals	XSLT for Workday	Connectors and Document Transformation
1.5 credits	1 credits	1 credit	1 credit	1.5 credits

Workday Pro Integrations Administration
5.5 credits total | Each track requires an exam fee of 1 training credit

Report Writer	Calculated Fields	Workday Integration System Fundamentals	Inbound EIB Integrations
1.5 credits	1 credit	1 credit	1 credit

Workday Pro Studio
8 credits total | Each track requires an exam fee of 1 training credit

Report Writer	Calculated Fields	Workday Integration System Fundamentals	XSLT for Workday	Introduction to Workday Studio	Advanced Workday Studio
1.5 credits	1 credit	1 credit	1 credit	1 credit	1.5 credits

Preparing: 3-6 Months out

* Complete integrations inventory

* Reach out to vendors to see if there is any changes or planned changes to how they do integrations (are you moving from flat file to APIs?)

* Document and conduct knowledge transfers

* Set expectations for functional offices for enhancements and changes of your old systems

Beginning Implementation

* Integrations often "go into the red"
    * Dependencies on vendors, functional owner decisions, and process changes contribute to this – Communication and being proactive is key to success.
* Frequent meeting rhythm for integrations leads and teams
* Capture integrations decisions as close to functional decisions as possible
* How do you decide which integrations your team will do and what your implementation partner will do?

Phases of Implementation

* Business Process Alignment

* Architect & Configure

* Testing

* Go-Live

Business Process Alignment

* Review integrations inventory with your partner
* Contact Vendors
* Complete Training
* Identify friction points, complex integrations, determine criticality

Architect & Configure

* Begin building your first integrations
* Early in this phase you will only have partial data in your implementation tenants so integrations will need to be revisited in later phases
* A lot of progress but not many completions

Testing

* Integrations left at 90% done now have the necessary data to finish
* Testing is done not just from an integration perspective but nested with functional user testing plans and scenarios
* Inevitably some integrations that are lower priority will be started and built during this phase
* Focus on the business-critical integrations that will prevent go-live

Demonstration

* Scenario: Worker demographic data needs to delivered from Workday to a SAAS product.

* Steve will show us:
  * How to create a report with the necessary data
  * Expose the report as a RAAS
  * Provide the RAAS directly to the vendor or alternatively consume the RAAS report with IPAAS
  * Transform the data into a format understood by the SAAS vendor
  * Deliver the result to the vendor

Questions?