# Configuring the Integration System User for Workday

- Configure Workday Credentials in LYNX
- Configuring the Integration System User for Workday
- Creating the Student Transaction Log Outbound Connector in Workday
- Updating Registered Headcount With Workday
- LYNX for Workday Architecture and Workflow
- LYNX for Workday Assessments/Exam Import/Export

The Integration System User account is responsible for making Workday API requests to deliver academic data to the LYNX database. Please refer to the Workday Documentation for more detailed information and for the security requirements necessary to complete these steps.

#### In This Article:

- Part 1: Create the Integration System User (ISU)
- Part 2: Create the Integration System Security Group
- Part 3: Apply Domain Security Policies
- Part 4: Apply Business Process Security Policies
- Part 5: Activate Pending Security Policy Changes

## Part 1: Create the Integration System User (ISU)

### 1. Run the Create Integration System User Task

| ŵ  | Q create integration | s system user  | ¢ | Ð | 0 |
|----|----------------------|--|---|---|---|
| \$ | earch Resu           | ts   |   |   |   |
| с  | ategories            | Search Results 1 items   |   |   |   |
|    | Common               | Tasks and Reports  |   |   |   |
|    | Assets               | Create Integration System User   |   |   |   |
|    | Banking              |  |   |   |   |
|    | Expenses             | Tip: try selecting another category from the left to see other results |   |   |   |
|    | Integrations         |  |   |   |   |
|    | Learning             |  |   |   |   |
|    | Organizations        |  |   |   |   |
|    |                      | Image: Getting to the Create Integration System task in Workday.       |   |   |   |
|    |                      |  |   |   |   |
|    |                      |  |   |   |   |

### 2. Enter a Username and Password

| ŵ   | Q create integration system       | uter  | ¢             | Ð             | 0    |
|-----|-----------------------------------|---|---------------|---------------|------|
| С   | reate Integratio                  | n System User   |               |               |      |
| A   | count Informatio                  | n   |               |               |      |
| Use | Name                              | ISU_CollegeNET  |               |               |      |
| Gen | erate Random Password             |   |               |               |      |
| Nev | Password                          | •   |               |               |      |
| Pas | sword Rules                       | Your new password must not be the same as your current password or user name. Minimum number of characters required: 8. The following character types must be represented: alphabetic characters, uppercase characters, lowercase characters, Arabic numerals 0 - 9, spe -/, =>?@\\`.'\`.'\`.'\`.'\`.'\`.'\'.'\'.'\'.'\'. | ecial charact | ers !"#\$%&'( | )*+, |
| Nev | Password Verify                   | *   |               |               |      |
| Req | uire New Password at Next Sign In |   |               |               |      |
| Ses | sion Timeout Minutes Enforced     | 129   |               |               |      |
| Ses | sion Timeout Minutes              | 0   |               |               |      |
| Dol | lot Allow UI Sessions             |   |               |               |      |
|     |                                   | Image: Entering information in the Create Integration User view.  |               |               |      |
|     |                                   |   |               |               |      |

Leave the **Session Timeout Minutes** set to zero to prevent session expiration. Enable **Do Not Allow UI Sessions** to prevent the ISU account from logging into the Workday UI. Special characters (such as ampersands) are allowed in the passwords.

## Part 2: Create the Integration System Security Group

## 1. Run the Create Security Group Task

| ŵ   | Q create security group |   | ¢ | Ð | 0 |
|-----|-------------------------|---|---|---|---|
| s   | earch Results           |   |   |   |   |
| Car | egories                 | Search Results 1 Items  |   |   |   |
| C   | ommon                   | Tasks and Reports   |   |   |   |
| 4   | ssets                   | Create Security Group   |   |   |   |
| E   | anking                  |   |   |   |   |
| E   | xpenses                 | Tip: ty selecting another category from the left to see other results |   |   |   |
|     | ntegrations             |   |   |   |   |
| - L | earning                 |   |   |   |   |
| C   | Irganizations           |   |   |   |   |
|     |                         | Image: Running the Create Security Group task in Workday.             |   |   |   |
|     |                         |   |   |   |   |



#### Using a Previously Created Group

If you already have a security group of type *Integration System Security Group (Unconstrained)* then you can skip Steps 1 and 2. Make sure you complete Step 3 to add the ISU account to the security group.

## 2. Name the Group and Select Type

Give your security group a name and select **Integration System Security Group (Unconstrained)** for the type. An unconstrained security group means that members will have access to data for all organizations.

| Ŵ   | Q create security group  | ¢ | Ð | 0 |
|-----|--|---|---|---|
| C   | reate Security Group   |   |   |   |
| Typ | e of Tenanted Security Group * Integration System Security Gro. * ne * Colleget(ET Integration |   |   |   |
|     | Image: Name the security group and select the constraint.                                      |   |   |   |
|     |  |   |   |   |

## 3. Add the Account to the New Group

Add the ISU account that you created previously as a member of the security group.

| Q create securit         | goob  | ¢ | Ð | 0 |
|--------------------------|---|---|---|---|
| Edit Integra             | ion System Security Group (Unconstrained)<br>ration com |   |   |   |
| Name                     | CollegeNET Integration                                  |   |   |   |
| Comment                  |   |   |   |   |
| Context Type             | Unconstrained   |   |   |   |
| Inactive                 |   |   |   |   |
| Integration System Users | × ISU_CollegeNET :                                      |   |   |   |
|                          | Image: Add your account to the new security group.      |   |   |   |
|                          |   |   |   |   |

# Part 3: Apply Domain Security Policies

## 1. Run the Security Group Task in Workday

Run the Maintain Permissions for Security Group task for the ISU security group.

| ŵ   | Q Maintain Permissions for Security Group  | ¢ | Ð | 0 |
|-----|--|---|---|---|
| Μ   | laintain Permissions for Security Group    |   |   |   |
| Sec | anity Group * 🔀 CollegeNET Integration 🚥 🖂 |   |   |   |
|     | Image: Running the security group task.    |   |   |   |
|     |  |   |   |   |

## 2. Add Domain Security Policies

Under Integration Permissions, add the domain security policies according to the lists below.

- Domain Security Policies permitting GET and PUT access:
  - Manage: Curriculum Management
  - Manage: Section Data
- Domain Security Policies permitting GET access:
  - Manage: Course Sections

- Manage: Preliminary Course Sections
- Set Up: Curriculum Management
- Worker Data: Public Worker Reports
- Set Up: Academic Units
- Set Up: Academic Appointments and Related Data
- Set Up: Course Tag Categories
- Set Up: Organization
- Manage: Location
- Integration Build

- Manage: Course Subjects
- Manage: Course Tags
- Domain Security Policies permitting VIEW and MODIFY access:
  - Custom Report Creation (required for Updating Registered Headcount With Workday)

#### Why these specific policies?

The domain security policies were determined by running the *View Security for Securable Item* report in the Workday UI for the Web Service Operations used by LYNX. Omitting any of them will prevent the LYNX integration from functioning properly.

Also, see Using the Workday Course Section Tag to Add Location Feature Requirements Through LYNX for permissions needed for that feature.

## Part 4: Apply Business Process Security Policies

### 1. Run the Business Process for Functional Area Report

Run the Business Process for Functional Area report.

| Ŵ  | Q business process sect | X   | Û | Ð | 0 |
|----|-------------------------|---|---|---|---|
| \$ | Search Results          |   |   |   |   |
| с  | ategories               | Search Results 1 items  |   |   |   |
|    | Common                  | Tasks and Reports   |   |   |   |
|    | Assets                  | Business Process Security Policies for Functional Area  |   |   |   |
|    | Banking                 | View the security configuration for each business process security policy in the specified functional area. Enables you to edit<br>permissions. Registrated prompt: Functional Area Optional prompt: none |   |   |   |
|    | Expenses                |   |   |   |   |
|    | Financial Accounting    | Tip: ty selecting another category from the left to see other results   |   |   |   |
|    | Integrations            |   |   |   |   |
|    |                         | Image: Running the report in Workday.   |   |   |   |
|    |                         |   |   |   |   |

## 2. Select a Functional Area and Business Process

Select "Student Records" as the Functional Area and "Course Section Event" as the Business Process.



## 3. Edit Permissions

Scroll to the very bottom of the page and Edit Permissions.

| ← Business Process<br>Student Records (************************************ | Security Policies for Functional Area  | •      |
|---|--|--------|
| Description Set up and manage your cur<br>Status Active                     | rriculum, enrollment access, registration controls, academic record policies, grading, and student record data.  |        |
| Course Section Event  | Security Group       (mpt)/         Note       %         Security Group       Pery         Security Group       All Uses         Action       Max         Action       Max         Security Group       All Uses         Security Group       Max         Action       Max         Action       Max         Security Group       All Uses         Security Group       Max         Action       Max         Security Group       All Uses         Security Group       Max         Action       Max         Security Group       Max         Action       Max         Security Group       Security Group         Security Group       Max         Security Group       Security Group         Security Group       Security Group         Security Group       Security Group         Security Group       Security Gro | ۰<br>۱ |
|   | Allow Attachments within Emails No<br>Edit Permissions   |        |
|   | Image: Editing permissions in Workday.   | v      |
|   |  |        |

## 4. Add the Security Group

Under *Initiating Action - Submit Published Course Section (Web Service)*, add the security group for the ISU account.

| Who Can S         | 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<br>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   | $\times$ Implementers $\cdots$ :=                               |   |
|                   | × Student Academic Unit<br>Administrator                        |   |
|                   | × Student Administrator …                                       |   |
|                   | × Student Records<br>Administrator                              |   |
|                   |   |   |
| Initiating Action | Submit Published Course Section (Web Service)                   |   |
| Description       | Edit task for published course section                          |   |
| Security Groups   | × CollegeNET Integration … :=                                   |   |
|                   | In  | nage: Adding the security group in Workday. |
|                   |   |   |

#### Why these specific policies?

A

The business process security policies were determined by running the *View Security for Securable Item* report in the Workday UI for the Web Service Operations used by LYNX. Omitting any of them will prevent the LYNX integration from functioning properly.

## Part 5: Activate Pending Security Policy Changes

### 1. Activate the Pending Security Policy

Run the Activate Pending Security Policy Changes task.

| ŵ  | Q Activate Pending Securi        | ty Policy Changes  | Û | Ð | 0 |
|--|----------------------------------|--|---|---|---|
| Sea  | rch Results                      |  |   |   |   |
| Categor  | ries                             | Search Results 1 items   |   |   |   |
| Comm   | non                              | Tasks and Reports  |   |   |   |
| Assets   | 8                                | Activate Pending Security Policy Changes                               |   |   |   |
| Bankin<br>Expens<br>Integra<br>Learnin<br>Organi | ng<br>ations<br>ing<br>sizations | Tip: try selecting another category from the left to see other results |   |   |   |
|  |                                  | Image: Activating the task in Workday.                                 |   |   |   |
|  |                                  |  |   |   |   |

### 2. Enter Comments

Enter a comment to describe the changes.

| ŵ    | Q activate pending security policy changes  | ¢ | Ð | 0 |
|------|---|---|---|---|
| A    | ctivate Pending Security Policy Changes   |   |   |   |
| Ente | er a comment to describe the security changes to be published. On the following screen you will be asked to review and confirm the changes that will take effect. |   |   |   |
| Curr | rent Security Evaluation Moment 07/03/2020 12:52:59.331 AM  |   |   |   |
| Con  | mment * Edited domain security policy for security group "CollegeNET Integration"   |   |   |   |
| Prop | posed Security Evaluation Moment 07/03/2020 111931.383 AM   |   |   |   |
| Con  | mment   Edited domain security policy for security group "CollegeHET Integration"   |   |   |   |
|      | Image: Entering a comment while activating the task.  |   |   |   |
|      |   |   |   |   |

## 3. Confirm the Changes

Confirm the changes using the **OK** button.

| All pending security policy changes will become effective. Please review the data below and click Confirm if you want to proceed. |  |                                       |  |  |  |  |  |
|---|--|---------------------------------------|--|--|--|--|--|
| Durrent Security Exclusion Manuel 07/01/2020 12:92-93 31 44   |  |                                       |  |  |  |  |  |
| Proposed Sequitiv Evaluation Moment 07/03/2020 01/19:31 383 AM  |  |                                       |  |  |  |  |  |
| Comment Edited domain security policy for security group "CollegeNET Integration"   | - Edited domain security policy for security group "Collegable" Integration" |                                       |  |  |  |  |  |
| Confirm *   |  |                                       |  |  |  |  |  |
| Domain Security Policies 13 items   |  | ₩ 🗇                                   |  |  |  |  |  |
| Domain Security Policy  | Last Changed   | By User                               |  |  |  |  |  |
| Integration Debug   | 07/03/2020 01:19:31.383 AM   | akunrath / Angela Kunrath             |  |  |  |  |  |
| Integration Event   | 07/03/2020 01:19:01.308 AM   | akunrath / Angela Kunrath             |  |  |  |  |  |
| Integration Build   | 07/03/2020 01:17:49.298 AM   | akunrath / Angela Kunrath             |  |  |  |  |  |
| Manage: Location  | 07/03/2020 01:16:16.843 AM   | akunrath / Angela Kunrath             |  |  |  |  |  |
| Set Up: Organization  | 07/03/2020 01:15:35.917 AM   | akunrath / Angela Kunrath             |  |  |  |  |  |
| Set Up: Academic Appointments and Related Data  | 07/03/2020 01:12:42.499 AM   | akunrath / Angela Kunrath             |  |  |  |  |  |
| Set Up: Academic Units  | 07/03/2020 01:11:56.505 AM   | akunrath / Angela Kunrath             |  |  |  |  |  |
| Worker Data: Public Worker Reports  | 07/03/2020 01:05:59.862 AM   | akunrath / Angela Kunrath             |  |  |  |  |  |
| Set Up: Curriculum Management   | 07/03/2020 01:02:19.250 AM   | akunrath / Angela Kunrath             |  |  |  |  |  |
| Manage: Section Data  | 07/03/2020 12:58:07.991 AM   | akunrath / Angela Kunrath             |  |  |  |  |  |
| Manage: Course Inventory  | 07/03/2020 12:58:07.991 AM   | akunrath / Angela Kunrath             |  |  |  |  |  |
| Manage: Curriculum Management   | 07/03/2020 12:58:07.991 AM   | akunrath / Angela Kunrath             |  |  |  |  |  |
| Manage: Course Material   | 07/03/2020 12:58:07.991 AM   | akunrath / Angela Kunrath             |  |  |  |  |  |
| 4   |  | · · · · · · · · · · · · · · · · · · · |  |  |  |  |  |
| OK Cancel   |  |                                       |  |  |  |  |  |
| Image: Hit the OK button to confirm changes.  |  |                                       |  |  |  |  |  |
|   |  |                                       |  |  |  |  |  |
|   |  |                                       |  |  |  |  |  |