



# JDXpert and Workday **Integration**



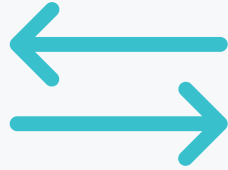
# Integration Options



## Web Services API

Put Job Profile, Get Reference IDs, Create Position, Edit Position Restrictions, etc. web services are available

Real-time data exchange



## EIB Workbook File transfer

Data sent from JDXpert to Workday  
Data sent from Workday to JDXpert  
EIB format is natively supported in Workday



## CSV/Excel Workbooks

Data can be exported from Workday to CSV/Excel format and sent to JDXpert

# Web Services



Workday provides an extensive Web Services API

Reference IDs, Job Profile, and Position data can be downloaded from Workday to JDXpert on demand  
Job Profile and Position data can be sent from JDXpert to Workday on demand and/or scheduled



Data transfer is instant in both directions when performed on demand

# JDX Workday Administration Tools

The screenshot displays the JDX Workday Administration Tools interface. At the top left, the 'STAGING jdxpert' logo is visible. The top right corner shows 'Entity Job Description Management' with icons for home, notifications, and user profile. The main navigation menu on the left includes 'Welcome', 'Advanced Tools', 'My Information', 'Actions', 'Search', 'Analytics', and 'Help'. The 'Admin Tools' tab is active, and the 'System Settings : Workday Integration Settings (Auth Settings: Admin\_Workday\_Administration)' page is open. This page contains a list of administrative actions:

- Workday Integration Settings**: Edit the Workday integration settings. This includes defining the Webservice URL and credentials, and the business rules related to each type of action.
- Refresh Position Codes**: Refresh Job Codes from Create Position transactions
- Edit EIB Profiles**: Edit the EIB profiles used in the Web Services. EIB profiles define how data is extracted from JDXpert to the EIB worksheet.
- View Web Service Logs**: View the Web Service Logs for a given date range, or by manager
- Download Reference IDs**: Download Reference IDs from Workday and refresh the Choice Lists in JDX
- Download Job Family Groups**: Download Job Family Groups from Workday
- Download Job Families**: Download Job Families from Workday
- Download Grades and Profiles**: Download Compensation Grades and related Grade Profiles from Workday
- Upload Grades and Profiles**: Upload Compensation Grades and related Grade Profiles to Workday
- Download Job Profiles**: Download Job Profiles from Workday and refresh the Job Descriptions in JDXpert
- Download Positions**: Download Positions from Workday and refresh the Job Descriptions in JDXpert
- Download Supervisory Orgs.**: Download Supervisory Organizations from Workday

At the bottom left of the interface, the following information is displayed: 'VM11SPRODQA001 v200', 'v2-dev.jdxpert.com', '2023.03.14', and a 'Privacy Policy' link.

# EIB Format



JDXpert provides a simple-to-use interface to define inbound and outbound integrations without requiring any programming



Data is mapped from the JDXpert job description to the EIB workbooks using EIB profiles



Ability to export job description(s) to an EIB workbook that can be imported into Workday



Ability to create an EIB workbook in Workday (with content) and import the data into JDXpert

# Sample EIB File

View Workbook: ImportWorkDayJobProfiles.XML

Close Form Download as Excel XML file

No Row Selected

Job Profile

| [A] Job Profile | [B]              | [C]      | [D]            | [E]                    | [F]            | [G]                           | [H]                      | [I]                      | [J]                       | [K]           |
|-----------------|------------------|----------|----------------|------------------------|----------------|-------------------------------|--------------------------|--------------------------|---------------------------|---------------|
| Area            | All              |          |                | Job Profile Data (All) |                | Job Profile Basic Data (All > |                          |                          |                           |               |
| Restrictions    | Required         | Optional | Optional       | Optional               | Optional       | Optional                      | Optional                 | Optional                 | Optional                  | Optional      |
| Format          | Text             | Y/N      | Job_Profile_ID | Text                   | YYYY-MM-DD     | Y/N                           | Text                     | Y/N                      | Text                      | Text          |
| Fields          | Spreadsheet Key* | Add Only | Job Profile    | Job Code               | Effective Date | Inactive                      | Job Title                | Include Job Code in Name | Job Profile Private Title | Job Profile S |
|                 | 1                |          |                | 25538                  | 2018-07-09     | n                             | Administrative Aide      | y                        |                           | Retrieves e   |
|                 | 2                |          |                | 26137                  | 2018-07-09     | n                             | Applications Support Ar  | y                        |                           | Have an ex    |
|                 | 3                |          |                | 25503                  | 2018-07-09     | n                             | LPN Ambulatory (25503    | y                        |                           | The Licens    |
|                 | 4                |          |                | 25501                  | 2018-07-09     | n                             | RN Ambulatory            | y                        |                           | The Regist    |
|                 | 5                |          |                | 42432                  | 2018-07-09     | n                             | Trained Medication Aids  | y                        |                           | To adminis    |
|                 | 6                |          |                | 42751                  | 2018-07-09     | n                             | Lead Buyer - AF          | y                        |                           | To meet cu    |
|                 | 7                |          |                | 63204                  | 2018-07-09     | n                             | RN-Straight Weekend, A   | y                        |                           | The Regist    |
|                 | 8                |          |                | 63251                  | 2018-07-09     | n                             | RN-Staff Nurse, LTC, BSI | y                        |                           | Responsib     |
|                 | 9                |          |                | 12345                  | 2018-07-09     | n                             | Test - HRIS - Intern     | n                        |                           |               |
|                 | 10               |          |                | PHYS00001              | 2018-07-09     | y                             | Physician - Allergy      | y                        |                           |               |
|                 | 11               |          |                | PHYS00002              | 2018-07-09     | y                             | Physician - Cardiology - | y                        |                           |               |
|                 | 12               |          |                | PHYS00003              | 2018-07-09     | y                             | Physician - Cardiology - | y                        |                           |               |
|                 | 13               |          |                | PHYS00004              | 2018-07-09     | y                             | Physician - Cardiology - | y                        |                           |               |
|                 | 14               |          |                | PHYS00005              | 2018-07-09     | y                             | Physician - Chiropractor | y                        |                           |               |

# EIB Profiles in JDXpert



Administration tool to map data elements to/from Workday



The tool extends the EIB Workbooks with data mapping definitions



The EIB Profile tool provides a rich set of functions to transform data structures in JDX to the required format in EIB



EIB Profiles have both import and export definitions

# EIB Profile Tool in JDxpert

Job Profiles from Workday

Edit WorkDay EIB Profile '\_Workday EIB Profile'

Edit a single WorkDay EIB Profile

Save and Close Cancel Refresh Configure

EIB Profile Name: \_Workday EIB Profile

Workday EIB Excel Template (XML): WD\_EIB\_With\_InternalPosting.xml

Show Export Options Show Import Options

Upload... Download

EIB Profile (Export Options)

- [B] All
  - Spreadsheet Key\*
  - Add Only
  - Job Profile
- [E] Job Profile Data
  - Job Code
  - Effective Date
- [G] Job Profile Basic Data
  - Inactive
  - Job Title
  - Include Job Code in Name
  - Job Profile Private Title
  - Job Profile Summary
  - Job Description**
  - Additional Job Description
  - Work Shift Required
  - Public Job
  - Management Level
  - Job Category
  - Job Level
- [S] Job Family Data+

Field Export Properties All Properties

Field Selected [L]: Job Description

|              |   |
|--------------|---|
| Area         | Job Profile Basic Data (All > Job Profile Data) |
| Restrictions | Optional  |
| Format       | Text  |
| Fields       | Job Description                                 |

Field Export Options/Rules

Export Action: Tagged-Text Expression

Tagged-Text Expression: `<b>Job Description Name</b>: @Job.JobDescName@ <br><b>Job Code</b>: @Job.JobCode@ <br>`

[Help with expressions](#)

Transform the JDx Value using a Choice List



# Workday Job Profiles

A Job Profile is a record of information about a job including a summary, description, and the job's key characteristics such as: exemption status, pay rate type, job classification groups, qualifications, and compensation grade



Job Profiles are stored as Job Descriptions in JDXpert

If Position Management is used, then Job Profiles will typically be mapped to Parent Jobs

If not, then Job Profiles can be stored as Independent Job Descriptions in JDXpert



JDXpert provides the ability to Import/Export Job Profiles from/to Workday on demand

| Workday Job Profile    |  |
|------------------------|--|
| Job Code:              | BB-02  |
| Job Title:             | Human Cyborg Relations   |
| Job Summary:           | Provides general human resource assistance to a business unit or corporate functional area which may include recruiting, selection and staffing, employment and personnel documentation, job evaluation, compensation, and/or benefits. Fluent in six million forms of communication.  |
| Job Description:       | <p><b>Job Posting</b><br/>Company is committed to diversity and inclusion. We are an equal opportunity employer including veterans and people with disabilities.</p> <p><b>A Brief Overview</b><br/>Provides general human resource assistance to a business unit or corporate functional area which may include recruiting, selection and staffing, employment and personnel documentation, job evaluation, compensation, and/or benefits. Fluent in six million forms of communication.</p> <p><b>What you will do</b></p> <ul style="list-style-type: none"><li>• Maintains effective communication, coordination, and working relationships with employees and management.</li><li>• Provide managers with information and analytics to more effectively pursue workplace initiatives.</li></ul> <p><b>Education Qualifications</b></p> <ul style="list-style-type: none"><li>• HS Required</li><li>• B.A. Human Resources Preferred</li></ul> <p><b>Qualifications (ALL)</b></p> <ul style="list-style-type: none"><li>• HS Required</li><li>• B.A. Human Resources Preferred</li></ul> <p>Our people are passionate about what they do, the product they sell, and the customers they serve. If you're looking for an opportunity to be a part of a work family that values collaboration, innovation and dedication, we're the right company for you.</p> |
| Job Family:            | FA-Employee Services   |
| Critical Job:          | True   |
| Job Classification(s): | 5 - Administrative Support Workers (United States EEO-1-United States of America)  |
| Exemption Data:        | United States of America: Exempt   |
| Responsibilities:      | <ul style="list-style-type: none"><li>• Maintains effective communication, coordination, and working relationships with employees and management.</li><li>• Provide managers with information and analytics to more effectively pursue workplace initiatives.</li></ul>  |
| Work Experience:       | Customer Service Experience: (Required)  |
| Education:             | Degree: HS (Required)<br>Degree: B.A.  |

# Adding/Updating Job Profiles

New Job Profiles can be created directly from JDXpert Job Descriptions

Existing Job Profiles can be updated from JDXpert Job Descriptions

EIB Profiles define the data elements for each group of fields to be sent to Workday

The Workday Job Description (or Additional Job Description) field can be updated with the JDXpert Job Posting

Log files capture the transaction details

# Updating Job Profiles

| Job Title                      | Workday Job Profile Summary   | Matching Job Description Name |
|--------------------------------|---|-------------------------------|
| Administrative Aide            | Retrieves electronic and paper-based records according to established telephones, filing, photocopying. Working with computer-based facility to locate, print and deliver. Performing clerical and secretarial policies and procedures of the hospital.                               | N/A                           |
| Communications Support Analyst | Have an extensive knowledge in basic knowledge of other Sanford skills and experiences to investigate appropriate presentation techniques. Assist in the creation and maintenance of reports. Analyze and make recommendations. Create and analyze reports created.                   | N/A                           |
| LPN Ambulatory (25503)         | The Licensed Practical Nurse (LPN) evaluation of patient care, under advanced practice provider, or patient safety of patients. Documents and contributes to the assessment of treatments as ordered. Provides counseling as needed. Counseling patients.                             | LPN Ambulatory (25503)        |
| Registered Nurse Ambulatory    | The Registered Nurse (RN) is responsible for assessment, diagnosis, outcome to provide individualized nursing coordination of care, patient assessment, various other nursing interventions, and teaching of the Charge Nurse. Demonstrates competency and                            | N/A                           |
| Medication Aide, SL2 - AF      | To administer and document intramuscular medications under the supervision and guidelines of the Charge Nurse. Assist in providing for the residents' physical, mental, spiritual, psychological, and social needs under the supervision, guidance, and teaching of the Charge Nurse. | N/A                           |

**Upload Job Descriptions to Workday**

Export Job Description(s) to Workday

Close Form   **Export to Workday**   Configure

**Selected Job Description Details**

| Job Description Name   | Jobcode | Position | JD Type     |
|------------------------|---------|----------|-------------|
| LPN Ambulatory (25503) | 25503   |          | Independent |

Workday Action

**Add/Update Job Profile in Workday**

Update Result/Validation Message

[More Info...](#)

**Export to Workday**

**Job Level:** Patient Support  
**Job Family:** Patient Support Services  
**Compensation Grade:** AFSCME 1851 - SL2 - TMA

# Positions

Position Management allows for the tracking of unfilled, filled, closed and frozen positions. In order to hire an employee into Workday, an available, unfilled position must first exist.

Positions in Workday are mapped to Child Job Description in the standard setup of JDXpert.

Positions can be downloaded in the same manner as Job Profiles are downloaded

There is a Download Positions button in the Administration Tools area of JDXpert

EIB profiles define how Workday data is converted to JDXpert data structures

# Creating/Updating Positions

You can initiate the 'Create Position' web service in JDXpert

- The Supervisory Organization and other required fields must be selected
- JDX will store the Position ID created by Workday to use for updating the position later

Update Positions using the 'Edit Position Restrictions' web service

- The EIB profile model is used to define which data elements are sent to Workday for these transactions

Log records are saved for each transaction

- This provides troubleshooting for any errors on the API

# Create Position in Workday

Upload Job Descriptions to Workday

Export Job Description(s) to Workday

Close Form **Export to Workday** Configure

**Selected Job Description Details**

|                      |         |
|----------------------|---------|
| Job Description Name | Jobcode |
| 1001715 Electrician  | 1001715 |

Workday Action

**Create Position in Workday** ←

Update Result/Validation Message

[More Info...](#)

**Export to Workday**

1001715 Electrician (Is Child of Parent Job '610445 - Electrician')

Preview Core Info. Workflow/Revisions Profile/Posi

NYU Position Description

Preview Job Description in HTML Format

Position

Supervisory

Organization:

Direct Manager

(Manager 1):

Manager's Manager

(Manager 2):

Position Title: Electrician

Job Family Group: NYU - Union

Job Family: Campus/Auxiliary/Transportation, Facilitie (Unions)

Compensation Grade: Local 810

# Reference IDs



Most selectable data in Workday is based on Reference IDs

These are user-defined or system-defined tables with a key value and display value



Reference IDs are mapped to corresponding System Choice-lists in JDXpert



The Reference ID lists can be downloaded on demand in the JDXpert Administration Tools

# Download Reference Table Tool

Download Reference ID Tables from Workday

Download Workday Reference ID Table. Each Reference Table has a corresponding Choice List in JDXpert

Close Form Download Reference IDs Configure

Select Reference Tables to Download from Workday [Check All](#) [Check None](#) [View Choice List](#)

| Reference Table  | Download On       | # Items | Excel Workbook                       |
|--|-------------------|---------|--------------------------------------|
| <input type="checkbox"/> Accomplishment_ID               | 6/27/2018 2:43 PM | 0       |                                      |
| <input type="checkbox"/> Assessment_Test_ID              | 6/27/2018 2:43 PM | 0       |                                      |
| <input type="checkbox"/> Certification_ID                | 6/27/2018 2:43 PM | 364     | Certification_ID.xlsx                |
| <input type="checkbox"/> Company_Insider_Type_ID         | 6/27/2018 2:43 PM | 0       |                                      |
| <input type="checkbox"/> Compensation_Grade_ID           | 6/27/2018 2:43 PM | 160     | Compensation_Grade_ID.xlsx           |
| <input type="checkbox"/> Compensation_Grade_Profile_ID   | 6/28/2018 3:10 PM | 264     | Compensation_Grade_Profile_ID.xlsx   |
| <input type="checkbox"/> Competency_ID                   | 6/27/2018 2:43 PM | 694     | Competency_ID.xlsx                   |
| <input type="checkbox"/> Competency_Level_ID             | 6/27/2018 2:43 PM | 0       |                                      |
| <input type="checkbox"/> Country_Region_ID               | 6/27/2018 2:44 PM | 61      |                                      |
| <input type="checkbox"/> Degree_ID                       | 6/27/2018 2:44 PM | 12      |                                      |
| <input type="checkbox"/> Difficulty_to_Fill_Code         | 6/27/2018 2:44 PM | 4       |                                      |
| <input type="checkbox"/> Employee_Type_ID                | 6/27/2018 2:44 PM | 10      |                                      |
| <input type="checkbox"/> Field_Of_Study_ID               | 6/27/2018 2:44 PM | 710     | Field_Of_Study_ID.xlsx               |
| <input type="checkbox"/> General_Event_Subcategory_ID    | 6/27/2018 2:44 PM | 128     | General_Event_Subcategory_ID.xlsx    |
| <input type="checkbox"/> ISO_3166-1_Alpha-2_Code         | 6/27/2018 2:44 PM | 246     | ISO_3166-1_Alpha-2_Code.xlsx         |
| <input type="checkbox"/> ISO_3166-1_Alpha-3_Code         | 6/27/2018 2:44 PM | 246     | ISO_3166-1_Alpha-3_Code.xlsx         |
| <input type="checkbox"/> ISO_3166-1_Numeric-3_Code       | 6/27/2018 2:44 PM | 246     | ISO_3166-1_Numeric-3_Code.xlsx       |
| <input type="checkbox"/> Job_Category_ID                 | 6/27/2018 2:44 PM | 5       |                                      |
| <input type="checkbox"/> Job_Classification_Reference_ID | 6/25/2018 8:23 AM | 2410    | Job_Classification_Reference_ID.xlsx |
| <input type="checkbox"/> Job_Family_Group_ID             | 6/27/2018 2:44 PM | 0       |                                      |
| <input type="checkbox"/> Job_Family_ID                   | 6/27/2018 2:44 PM | 198     | Job_Family_ID.xlsx                   |
| <input type="checkbox"/> Job_Level_ID                    | 6/27/2018 2:44 PM | 11      |                                      |
| <input type="checkbox"/> Language_Ability_Type_ID        | 6/27/2018 2:44 PM | 0       |                                      |
| <input type="checkbox"/> Language_ID                     | 6/27/2018 2:44 PM | 85      |                                      |
| <input type="checkbox"/> Language_Proficiency_ID         | 6/27/2018 2:44 PM | 0       |                                      |
| <input type="checkbox"/> Location_ID                     | 6/27/2018 2:44 PM | 1781    | Location_ID.xlsx                     |
| <input type="checkbox"/> Management_Level_ID             | 6/27/2018 2:44 PM | 42      |                                      |
| <input type="checkbox"/> One-Time_Payment_Plan_ID        | 6/27/2018 2:44 PM | 50      |                                      |
| <input type="checkbox"/> Organization_Reference_ID       | 6/27/2018 2:44 PM | 7743    | Organization_Reference_ID.xlsx       |
| <input type="checkbox"/> Pay_Rate_Type_ID                | 6/27/2018 2:44 PM | 5       |                                      |
| <input type="checkbox"/> Position_Time_Type_ID           | 6/27/2018 2:44 PM | 3       |                                      |
| <input type="checkbox"/> Proficiency_Rating_ID           | 6/27/2018 2:44 PM | 0       |                                      |
| <input type="checkbox"/> Questionnaire_ID                | 6/27/2018 2:44 PM | 0       |                                      |
| <input type="checkbox"/> Skill_ID                        | 6/27/2018 2:44 PM | 124     | Skill_ID.xlsx                        |
| <input type="checkbox"/> Specialty_ID                    | 6/27/2018 2:44 PM | 0       |                                      |
| <input type="checkbox"/> Student_Award_Source_ID         | 6/27/2018 2:44 PM | 7       |                                      |
| <input type="checkbox"/> Subspecialty_ID                 | 6/27/2018 2:45 PM | 0       |                                      |
| <input type="checkbox"/> Training_Type_ID                | 6/27/2018 2:45 PM | 0       |                                      |



# Interface using SFTP



An SFTP-based interface model can be used to transfer data between Workday and JDxpert



File transfers can be setup to run on a scheduled basis



Imports or exports are available in EIB format, Excel, or CSV format



JDxpert has user-defined import and export profiles that can be setup

# Import from EIB Workbook

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JDXpert can import directly from a Workday EIB file

---

EIB files may have multiple rows per job description

---

EIB profile defines how to handle all fields and groups

---

Job imports can be run manually or on a schedule through the SFTP interface

---

# Import from EIB Workbook

The screenshot shows a software interface for importing job description data. The main window is titled "Import Job Description Data From Excel" and contains various options for selecting worksheets and import settings. A sub-dialog box titled "Job Description Import Options" is open, showing the following fields:

- Select Type of Import:** A dropdown menu with "WorkDayEIB" selected.
- Select WorkDay EIB Profile:** A dropdown menu with "\_Workday EIB Profile" selected. Below it are "Add Profile" and "Delete" links.
- WorkDay EIB Profile Details:** A section containing a "Description" field with "\_Workday EIB Profile" and an "Excel Template" field with "WD\_EIB\_With\_InternalPosting.xml". An "Edit Profile" button is located to the right of the description field.

A red rectangular box highlights the text "Import directly from Workday EIB files" in the upper right area of the sub-dialog.

# Import from EIB Workbook

Edit Master

Second level

Third level

Fourth level

Field Import Properties All Properties

Field Selected [U]: Responsibility Description\*

|              |   |
|--------------|---|
| Area         | Responsibility Qualification Replacement Data+ (All > Edit Position Restriction Event Data > Qualification Replacement Data > Responsibility Qualification Replacement) |
| Restrictions | Required  |
| Format       | Text  |
| Fields       | Responsibility Description*   |

Field Import Options/Rules

Import Action  
This Multi-Row field is imported

Save value in this Bullet List Column: Text

Transform value using a Choice List and store in Bullet List Column:

Define import rule for each row

\*\* Format is: RowNumber|Target Field|Optional named Express

Define how each EIB column is mapped into JDXpert

This screen shows the many-to-one definition

# Scheduled Tasks

JDXpert provides Remote Tasks that can be scheduled to perform API or interface actions

JDXpert can schedule a task to send Job Profile or Position data over the API to Workday

JDXpert can schedule a task to send/receive flat files to/from an SFTP server

Stakeholders can be sent the results of the task through email notifications

# Want More Information?

Contact our sales team at [sales@hrtms.com](mailto:sales@hrtms.com) or visit our website, [jdxpert.com](http://jdxpert.com)

# Thank you

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