

Workday set-up guide

Introduction

- This guide provides instructions for configuring a Workday integration with CoderPad.
- Prerequisites:
 - Before proceeding, the integration must be enabled for your CoderPad account. To request access, please contact support@coderpad.io.
 - We will provide a CLAR file containing the integration to be deployed in your tenant.
- Once the integration is enabled, follow these four steps to complete the setup:
 - Deploy the integration in your Workday tenant using Workday Studio.
 - Configure the required security settings as outlined below in your Workday instance.
 - Provide the API keys for communication between Workday and CoderPad.
 - Configure the assessment settings as outlined below in your Workday instance.

1. Deploy the integration in tenant

- Open Workday Studio.
- Import the "CoderPad integration" CLAR file.
- Open a connection to your Workday tenant (Cloud Explorer panel).
- Right-click on `CoderpadIntegration` within the Project Explorer panel, and click "Deploy to Workday".

2. Workday Security Configuration

As an administrator for your Workday account, login to your Workday account and follow the steps below to complete the security configuration for setting up the integration between Workday and CoderPad (needed for both Screen and Interview integration).

▼ 2.1. Create integration system user

- ▼ Search `create integration system user`

- Username: "coderpad_integration_user"
- Set a secure password
- Check "Do Not Allow UI Sessions". This option prevents the integration system user from signing in to Workday through the UI.
- Leave other fields to their default value and click "OK"

Create Integration System User

Account Information

User Name * coderpad_integration_user

Generate Random Password

New Password *

Password Rules
Your new password must not be the same as your current password or user name. Minimum number of characters required: 12. The following character types must be represented: alphabetic characters, uppercase characters, lowercase characters, Arabic numerals 0 - 9, special characters !"#%&()*+,-./:;>?@[\\^_`{|}~.

New Password Verify *

Require New Password at Next Sign In

Session Timeout Minutes Enforced 120

Session Timeout Minutes 0

Do Not Allow UI Sessions

Cancel OK

▼ Click "Done" to confirm creation

Create Integration System User coderpad_integration_user

Person (empty)

Days Since Last Password Change 0

Session Timeout Minutes Enforced 120

Do Not Allow UI Sessions Yes

Account Enabled for Data Masking No

Preferred Locale (empty)

User Language (empty)

Preferred Search Category (empty)

Integration Account Yes

Security Groups 6 items

Security Group	Type	Valid for Security Group Restrictions
~Worker~ Start Date Correction Assignee Group	Worker Start Date Correction Assignee Group	Worker Start Date Correction Assignee Group

Done

▼ 2.2. Prevent password from expiring

To avoid integration errors caused by expired passwords, Workday recommends that you prevent Workday passwords from expiring.

▼ Search **maintain password rules**

- Scroll down, and add "coderpad_integration_user" to System Users exempt from password expiration
- Click "OK"

Session Timeout

Default Session Timeout Minutes *

* Apply to Users with no Individual Session Timeout
 Override Session Timeout for All Users

System Users exempt from password expiration

▼ Click "Done" to save changes

Maintain Password Rules

Password Rules Configuration	...
Minimum Password Length	12
Password Must Contain Alphabetic Characters	Yes
Password Must Contain Uppercase Characters	Yes
Password Must Contain Lowercase Characters	Yes
Password Must Contain Numeric Digits	Yes
Password Must Contain Special Characters	Yes
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

Upon Login

▼ 2.3. Create integration system security group

▼ Search

- Type of Tenant Security Group: "Integration System Security Group (Unconstrained)"
- Name: "coderpad_integration_sg"
- Click "OK"

Create Security Group [X]

Type of Tenanted Security Group * Integration System Security Group (U... ▼

Name * coderpad_integration_sg

Cancel OK

▼ On the new screen

- Name: "coderpad_integration_sg"
- Integration System Users: "coderpad_integration_user"
- Click "OK"

Edit Integration System Security Group (Unconstrained) coderpad_integration_sg

Name * coderpad_integration_sg

Comment

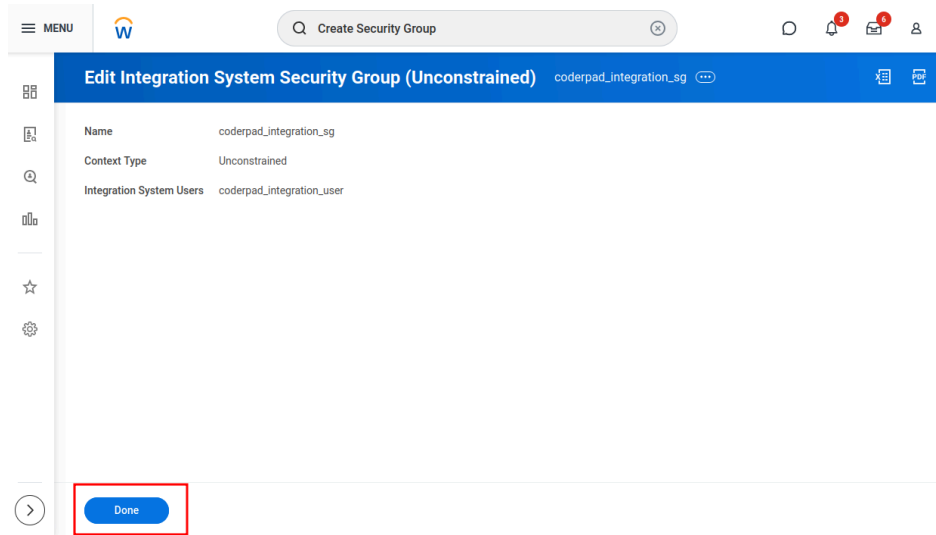
Context Type Unconstrained

Inactive

Integration System Users × coderpad_integration_user

OK Cancel

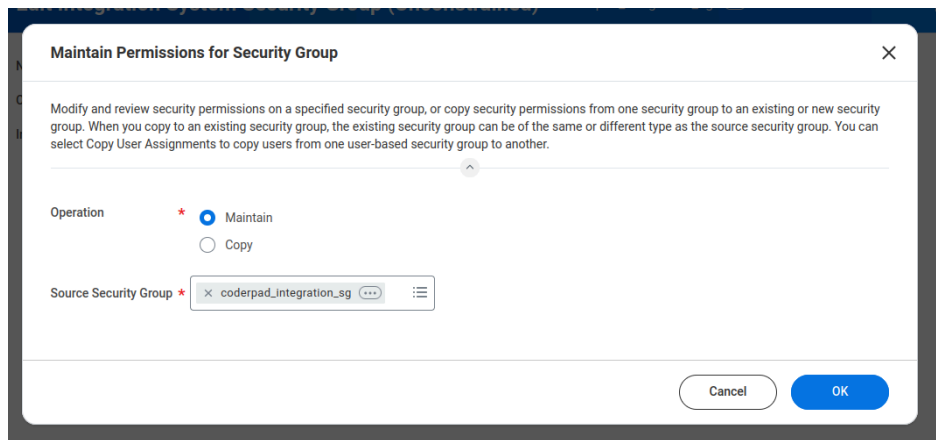
▼ Click "Done" to confirm creation



▼ 2.4. Set permissions for security group

▼ Search **Maintain Permissions for Security Group**

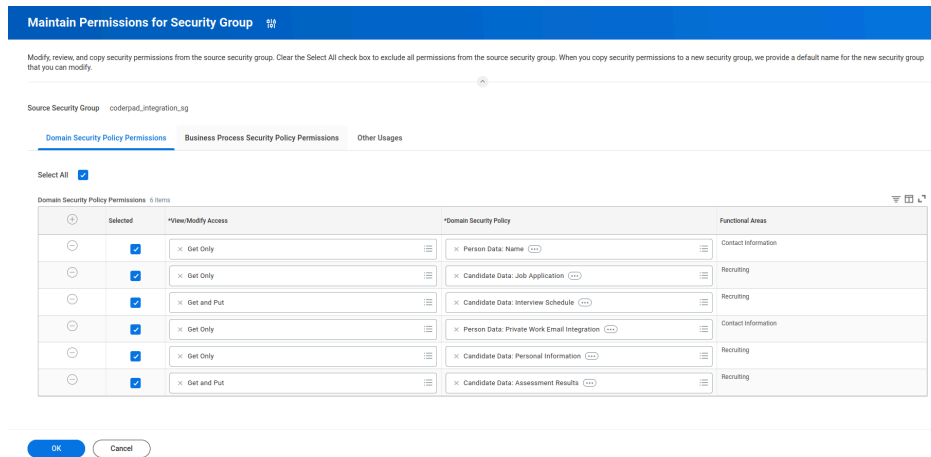
- Operation: "Maintain"
- Source Security Group: "coderpad_integration_sg"
- Click "OK"



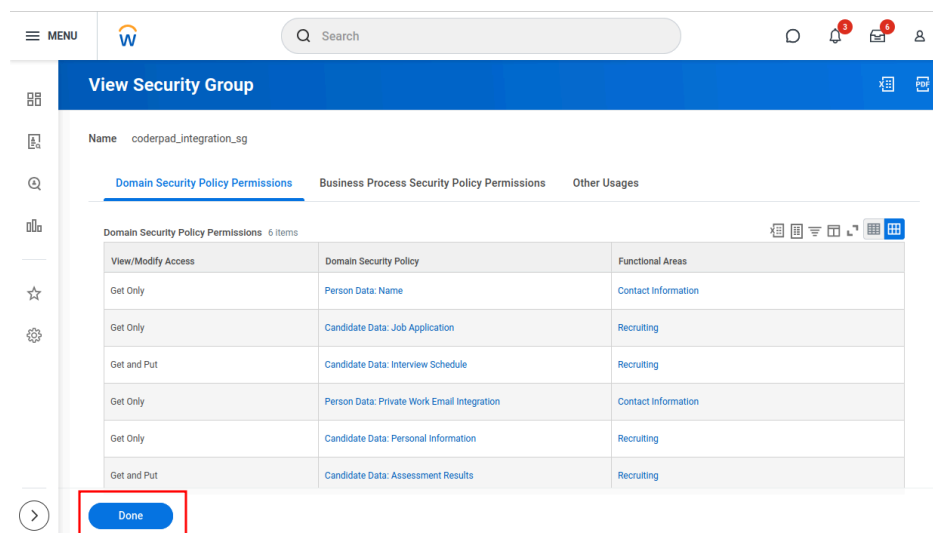
▼ Add the following permissions

- To connect with interviewers
 - Get Only: "Person Data: Name"
 - Get Only: "Person Data: Private Work Email Integration"
- To support the candidates and interviews
 - Get Only: "Candidate Data: Personal Information"
 - Get Only: "Candidate Data: Job Application"

- Get and Put: "Candidate Data: Interview Schedule"
- Get and Put: "Candidate Data: Assessment Results"
- Click "OK"



▼ Click "Done" to save changes



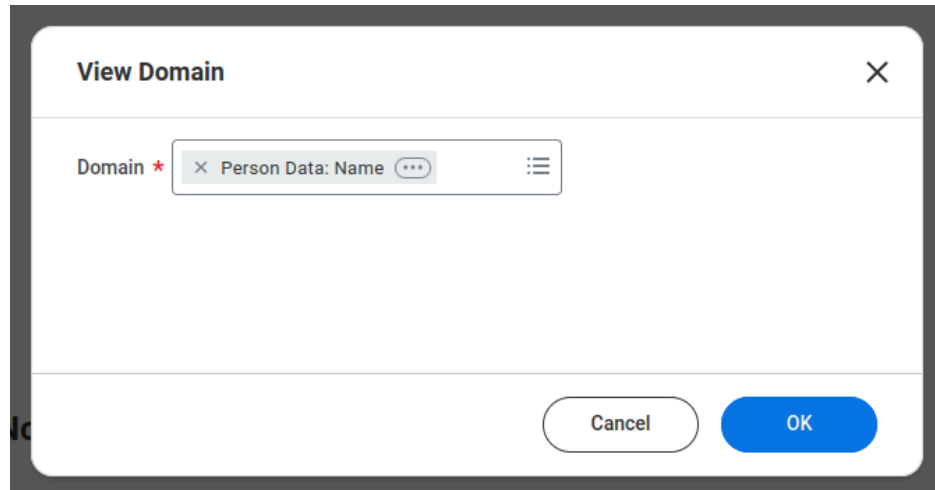
▼ 2.5. Grant security access to domains

- Please follow these steps for EACH of the following domains:
 - Person Data: Name
 - Person Data: Private Work Email Integration
 - Candidate Data: Personal Information
 - Candidate Data: Job Application

- Candidate Data: Interview Schedule
- Candidate Data: Assessment Results

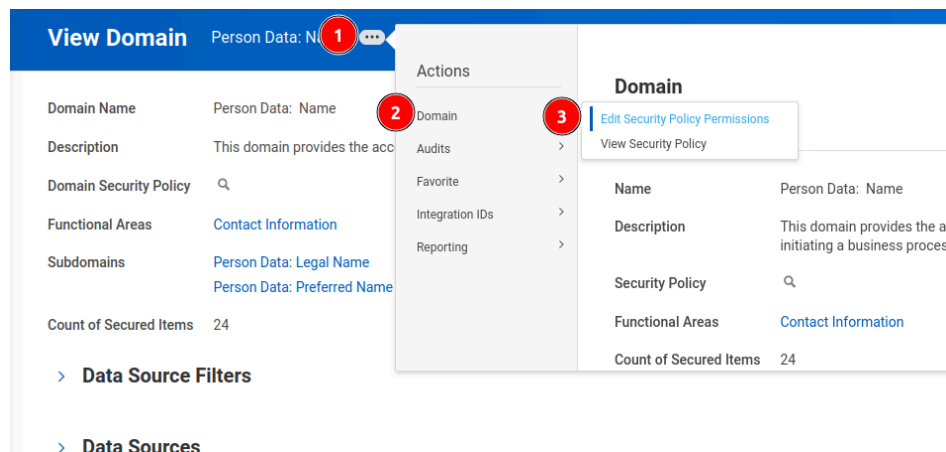
▼ Search [view domain](#)

- Domain: the current domain you want to edit
- Click "OK"



▼ Click on Related Actions

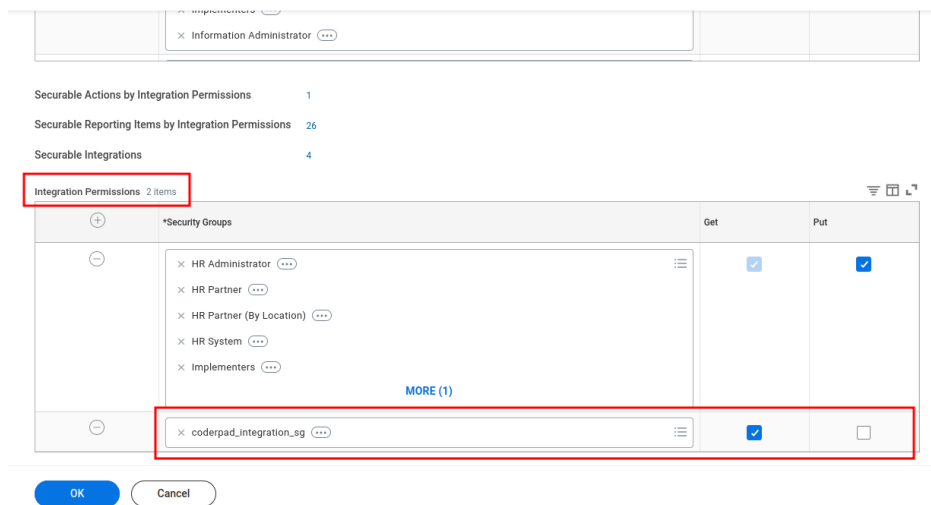
- Click Domain > Edit Security Policy Permissions



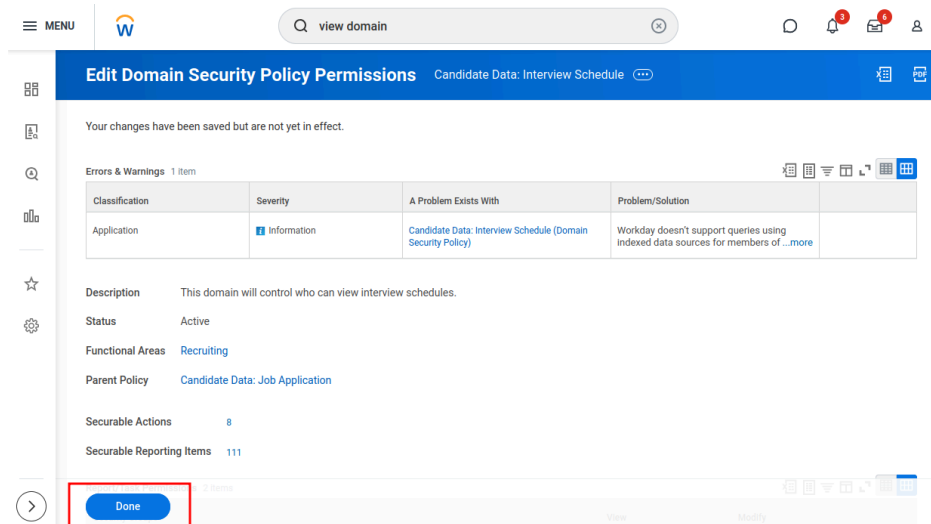
▼ Scroll down to Integration Permissions section

- Add "coderpad_integration_sg" security group
- According the domain you are editing, check "Get" only or both "Get" and "Put"
 - Get Only
 - Person Data: Name

- Person Data: Private Work Email Integration
- Candidate Data: Personal Information
- Candidate Data: Job Application
- Get and Put
 - Candidate Data: Interview Schedule
 - Candidate Data: Assessment Results
- Click "OK"



▼ Click "Done" to save changes



▼ 2.6. Activate pending security policy changes

- ▼ Search **Activate Pending Security Policy Changes**
 - Add a comment to describe your changes

- Click "OK"

Activate Pending Security Policy Changes

Enter 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.

Current Security Evaluation Moment	10/02/2024 10:01:53.596 AM
Comment	* Grant security access to domains
Proposed Security Evaluation Moment	10/02/2024 10:03:46.652 AM
Comment	* <input type="text"/>

▼ Confirm changes

- Check "Confirm"
- Click "OK"

Activate Pending Security Policy Changes

All pending security policy changes will become effective. Please review the data below and click Confirm if you want to proceed.

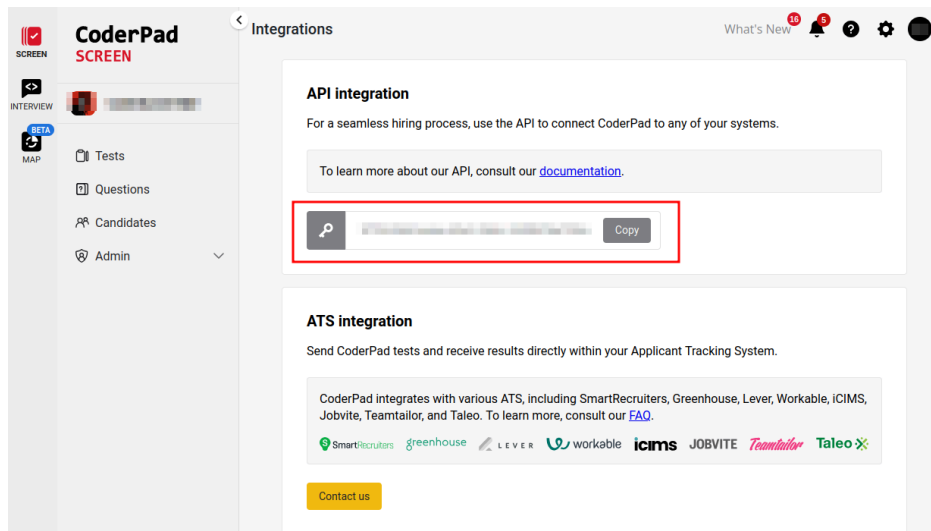
Current Security Evaluation Moment	10/02/2024 10:01:53.596 AM
Proposed Security Evaluation Moment	10/02/2024 10:03:46.652 AM
Comment	Grant security access to domains
Confirm	* <input checked="" type="checkbox"/>

3. API Key Configuration

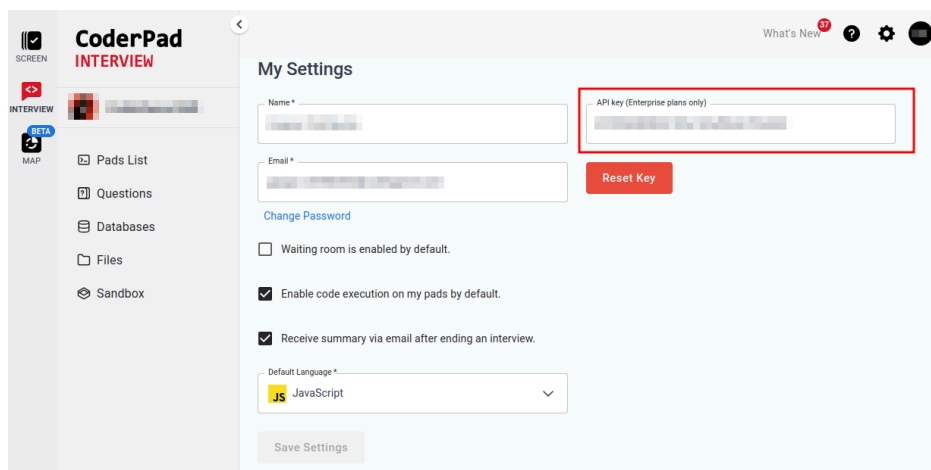
▼ 3.1. Get or generate API keys

Note: you only need to provide the API keys of the product(s) you use (Screen or Interview or both).

- ▼ Screen API key: <https://screen.coderpad.io/work/dashboard/integration>

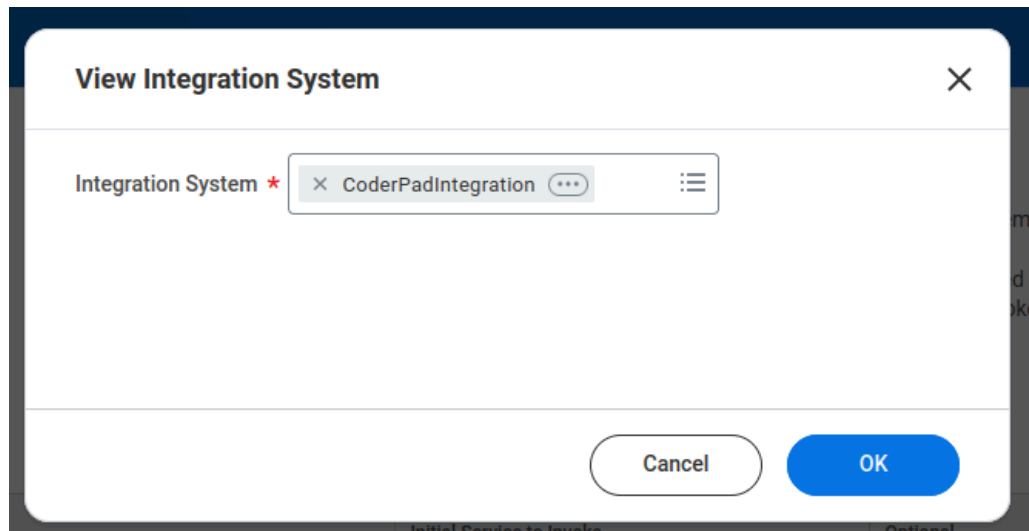


▼ Interview API key: <https://app.coderpad.io/dashboard/settings>

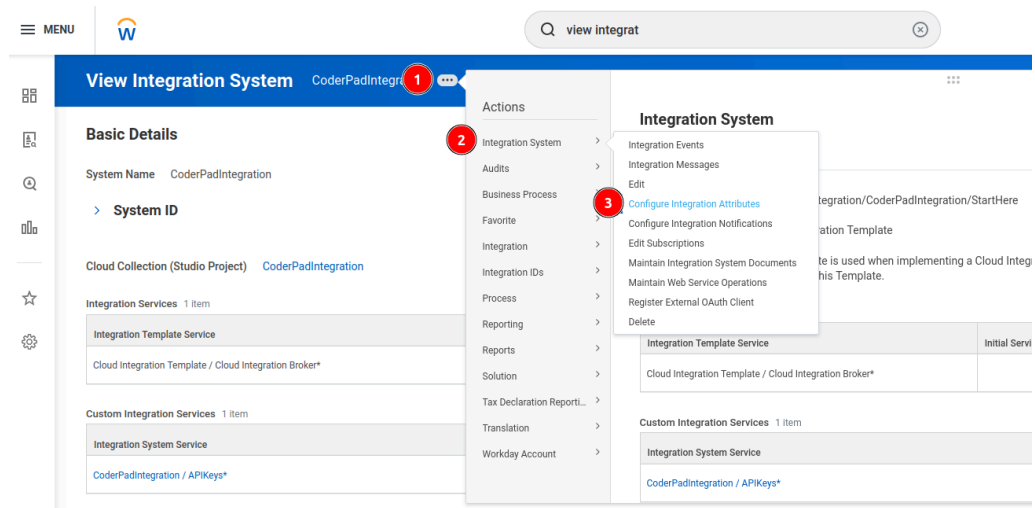


▼ 3.2. Provide API keys to integration

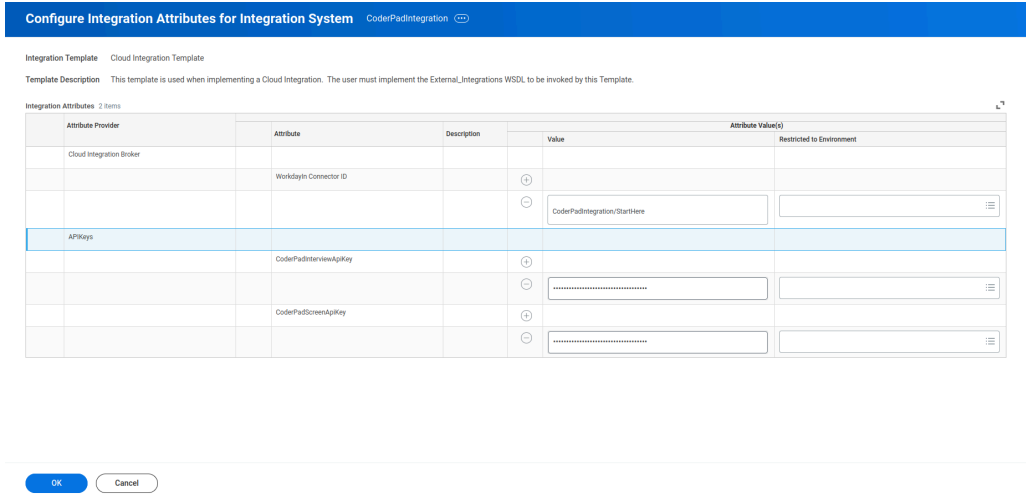
- Search [View Integration System](#)
 - Integration System: "CoderPadIntegration"
 - Click "OK"



- Click on Related Actions > Integration System > Configure Integration Attributes



- Fill "CoderPadInterviewApiKey" with your Interview API key
- Fill "CoderPadScreenApiKey" with your Screen API key
- Click "OK"



4. Workday Assessment Configuration

▼ 4.1. Create the necessary Assessment statuses

- Search **Maintain Assessment Statuses**

▼ Create statuses

- According to your needs, create the following status (note: reference ID will be set on the next step):

- For Interview usage

Assessment Status Name	Overall Status	Test Status	Reference ID
Interview - Create pad	X		Interview_Create_Pad
Interview - Pad created	X		Interview_Pad_Created
Interview - Declined	X		Interview_Declined

- For Screen usage

Assessment Status Name	Overall Status	Test Status	Reference ID
Screen - Send Test	X		Screen_Send_Test
Screen - Test Sent	X	X	Screen_Test_Sent

Assessment Status Name	Overall Status	Test Status	Reference ID
Screen - Declined	X		Screen_Declined
Screen - Test completed	X	X	Screen_Test_Completed
Screen - Test in progress		X	Screen_Test_In_Progress
Screen - Test Incomplete		X	Screen_Test_Incomplete

- Click "OK"

Maintain Assessment Statuses

14 items

+	Assessment Status	Order	*Assessment Status Name	Overall Status	Test Status	Inactive	In Use
+	q	▼	Screen - Send test	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
+	q	▲	Screen - Test sent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
+	q	▲	Screen - Declined	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
+	q	▲	Screen - Test completed	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
+	q	▲	Screen - Test in progress	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
+	q	▲	Screen - Test incomplete	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
+	q	▲	Interview - Create and	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

OK Cancel

▼ Set reference IDs

- Search **Maintain Reference IDs**
- Select "Recruiting Assessment Status"

Maintain Reference IDs [X]

Business Object * × Recruiting Assessment Status [⋮]

Include Empty Values Only
 Include Defaulted Values Only
 None of the above

Cancel OK

- Set the Reference ID Value for each status as described in the table above
- Click "OK"

Business Object Instance	Reference ID Type	Reference ID Value
Interview - Declined	Assessment_Status_ID	Interview_Declined
Screen - Send test	Assessment_Status_ID	Screen_Send_Test
Screen - Test sent	Assessment_Status_ID	Screen_Test_Sent
Screen - Declined	Assessment_Status_ID	Screen_Declined
Screen - Test completed	Assessment_Status_ID	Screen_Test_Completed

▼ 4.2. Configure the Assess Candidate business process

- ▼ Search `bp: assess candidate` (e.g. Assess Candidate For Global Modern Service")
 - Click on Related Actions > Business Process > Edit Definition

- Click "OK"
- ▼ Add a business process step with the following properties
 - Order: must be right after the "Assess Candidate" step (should be in alphabetical order)
 - Type: "Integration"
 - Run As User: your admin user
 - Click "OK"

Step	*Order	Parallel Step Order in My Tasks	If	Notes	*Type	Specify	Optional
a							
b					Action	Assess Candidate	
c			If Screen or Interview?		Integration		
d					Action	Make Assessment Decision	

OK Cancel

▼ Maintain redirect

- Click on Related Actions > Business Process > Maintain Redirect

Optional	Group	Additional Information
No		
No	Primary Recruiter	
No		Redirect: Rerun Integration Routing: Recruiting Administrator
No	Manager Recruiter	

Done

- Click "OK"
- Check Rerun Integration
- Security Groups: Recruiting Administrator

Maintain Redirect

Effective Date * 10/02/2024

Time Zone * GMT-05:00 Eastern Time (New York)



Workflow Step * Assess Candidate for Global Modern Services step c - Integration

Enabled Actions

Move to Next Step

Rerun Integration

Routing

Security Groups *  

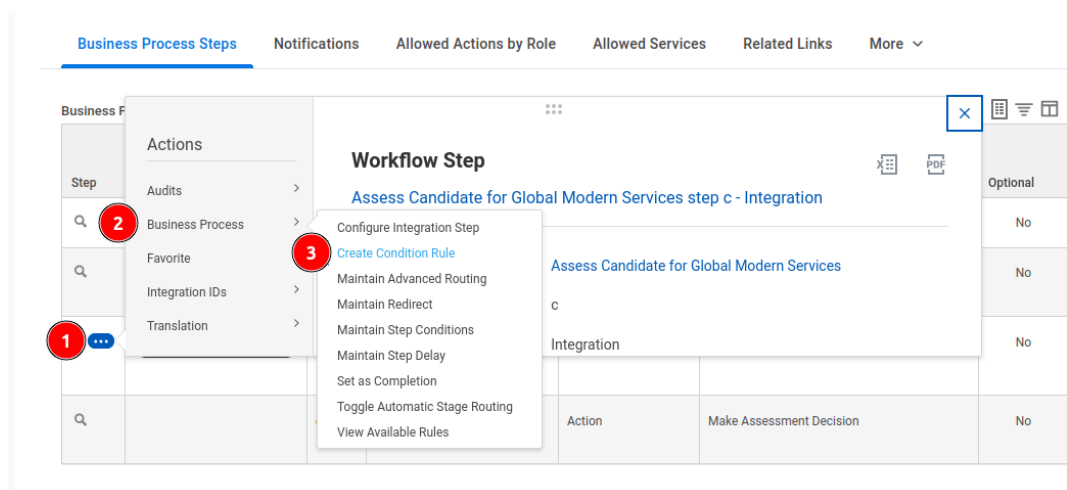
OK

Cancel

- Click "OK"
- Click "Done"

▼ Create condition rule

- Click on Related Actions > Business Process > Create condition rule



- Description: **If Screen or Interview**
- Rule Conditions
 - And/Or: **And**
 - Source External Field or Condition Rule: **Assessment Status**
 - Relational Operator: **exact match with the selection list** (or **in the selection list** ?)

- Comparison Type: Value specified in this filter
- Comparison values: Screen - Send test and Interview - Create pad
- Click "OK"

Create Condition Rule

Description: * If Screen or Interview

Comment:

Category:

Derived Logic: (empty)

Copy Condition from Rule:

Rule Conditions: 1 Item

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	Assessment Status	in the selection list	Value specified in this filter	CodinGame - Send test Create pad

OK Cancel

▼ Maintain step conditions

- Click on Related Actions > Business Process > Maintain Step Conditions
- Click "OK"

The screenshot shows the 'Business Process Steps' configuration page. The 'Business Process' dropdown menu is open, showing options like Audits, Business Process, Favorite, Integration IDs, and Translation. A red circle '1' highlights the menu icon. A red circle '2' highlights the 'Business Process' option. A red circle '3' highlights the 'Maintain Step Conditions' option in the context menu. The context menu is open over the 'Assess Candidate for Global Modern Services' step, showing options like 'Configure Integration Step', 'Create Condition Rule', 'Maintain Advanced Routing', 'Maintain Redirect', 'Maintain Step Conditions', 'Maintain Step Delay', 'Set as Completion', 'Toggle Automatic Stage Routing', and 'View Available Rules'.

- Add rule If Screen of Interview
- Click "OK"

Maintain Step Conditions 9/16

Entry Conditions: If ALL conditions are true, the step will be entered.

Effective Date * 10/02/2024

Time Zone * GMT-05:00 Eastern Time (New York)

Workflow Step * Assess Candidate for Global Modern Services step c - Integration

Entry Conditions 1 item

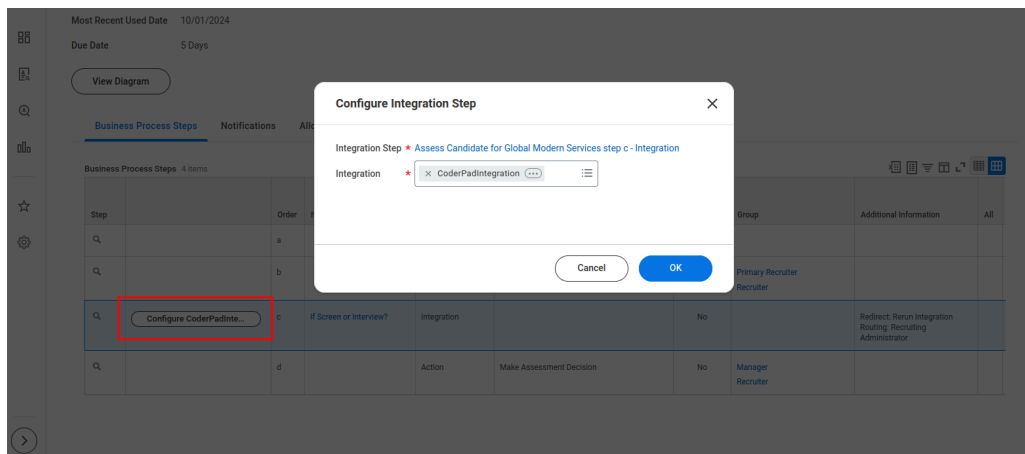
+	*Rule
-	<div style="border: 1px solid #ccc; padding: 2px;"> x If Screen or Interview ⋮ </div>

OK

Cancel

▼ Configure integration

- Click "Configure CoderPadIntegration" button
- Click "OK"



- Request name:
 - Static Text: "CoderPadIntegration"
- Configure the launch parameters:

Field	Value type	Value
Candidate Name	Determine Value at Runtime	Full Name
Job Application ID	Determine Value at Runtime	Job Application
Candidate Email	Determine Value at Runtime	Email

- Click "OK"

Integration Configuration

Request Name

Static Text

Dynamic using

Integration CoderPadIntegration

Integration Criteria 1 Item

Provider	Field	Value Type	Value
CoderPadIntegration	<input checked="" type="checkbox"/> Candidate Name	Determine Value at Runtime	<input type="text" value="Full Name"/>
	<input checked="" type="checkbox"/> Job Application ID	Determine Value at Runtime	<input type="text" value="Job Application"/>
	<input checked="" type="checkbox"/> Candidate Email	Determine Value at Runtime	<input type="text" value="Email"/>

▼ 4.3. Configure integration notifications

▼ Search

- Integration System: "CoderPadIntegration"
- Click "OK"

▼ Configure notification

- Click on Related Actions > Integration System > Configure Integration Notifications

The screenshot shows the 'View Integration System' page for 'CoderPadIntegration'. The breadcrumb trail is 'Integration System > Configure Integration Notifications'. The left sidebar has an 'Integration System' action highlighted with a red circle '2'. A dropdown menu is open, showing 'Configure Integration Notifications' highlighted with a red circle '3'. The main content area shows details for the integration system, including 'System Name: CoderPadIntegration', 'System ID', and a table of 'Integration Template Services'.

- Trigger(s)
 - Trigger on Status: "Completed with Errors"
- Recipient(s)
 - Recipients: "by Person"
- Message Content

- Subject (Text): "CoderPad integration failed."
- Body (Text): "CoderPad integration failed. You can find more information in the log file.
It may be due to your CoderPad account running out of pad."
- Click "OK"
- Click "Done"

Integration Notifications CoderPadIntegration

Integration Template Cloud Integration Template

Template Description This template is used when implementing a Cloud Integration. The user must implement the External_Integrations WSDL to be invoked by this Template.

Notifications

Trigger(s) > Conditions and Rules

Trigger on Launch

Trigger on Status

Repeat On

Related Instance(s)

Recipient(s)

Recipients Groups

OK Cancel

▼ 4.4. Add Screen tests to the integration

▼ Link Workday tenant to Screen account

This must be done by the same user as the one who provided the Screen API-Key in section 3.1.

- Visit <https://screen.coderpad.io/work/dashboard/integration/workday>
- Fill the fields. Here is an example of what it should look like:

username / password	same as your Workday tenant credentials
SOAP url	https://wd2-impl-services1.workday.com/ccx/service/my_tenant_name
Tenant name	my_tenant_name

- Click "Test configuration". If you have no error message, it means it works.
- Click "Enable", the list of all your tests should appear.

▼ Search Maintain Recruiting Assessment Tests

Each test you want to send through Workday must be added here. The reference ID of the test must match exactly the ID shown on the CoderPad Screen Workday

integration page

(<https://www.screen.coderpad.io/work/dashboard/integration/workday>).

- Add a line (by clicking on "+") and set a test name
- Click "OK".
- Click on Related Actions > Integration IDs > Edit reference ID

Assessment Test	Test Name	Assessment Category	Integration System	Vendor Comment	Inactive	In Use
		Technical			No	Yes
	Audits				No	Yes
	Favorite				No	Yes
	Integration IDs	Technical			No	Yes
	Maintain Recruiting As...	Technical			No	Yes
	Translation				No	Yes
	View Recruiting Asses...				No	Yes
	React test	Technical			No	Yes

- Reference ID Value: the ID of the test you want to link
- Click "OK"

Edit Reference ID Workday integration test

Workday ID: 1fc5ea30b99310154db00a3608ef0000

Reference ID Type: Reference_ID

Reference ID Value:

OK Cancel

▼ 4.5. Add Interview test to the integration

Unlike Screen, there is no specific test to send to the candidate. The integration generates a pad that you can send to the candidate. This means you only have one assessment test to add to your Workday dashboard. Follow the steps described in section 4.4 above, and create a test called "CoderPad Interview", with the reference ID "CoderPad_Interview_Assessment_Test".