

Better together: Visier and Workday

Visier Data Connector for Workday— Technical Overview

Data-driven organizations leverage Workday for basic HR reporting, using it in tandem with Visier to support more sophisticated trending and forecasting analysis. Visier's open platform easily plugs into your Workday architecture or enterprise data mesh. It includes a data connector that automates retrieving Workday data and simplifies the process of loading it and mapping its attributes into the Visier platform.

Visier's data connectors deliver the technical stream for onboarding subjects into your Visier solution through the use of focused API integration. Data connectors require no coding, and less hands-on work than manual data extracts. Connectors utilize an integration user on the source system to authenticate the connection and read the data from the source system. Data connectors allow you to:

- Retrieve data from a source system.
- Load data into Visier's system.
- Transform data into the correct format.
- Map properties to Visier's analytical model.

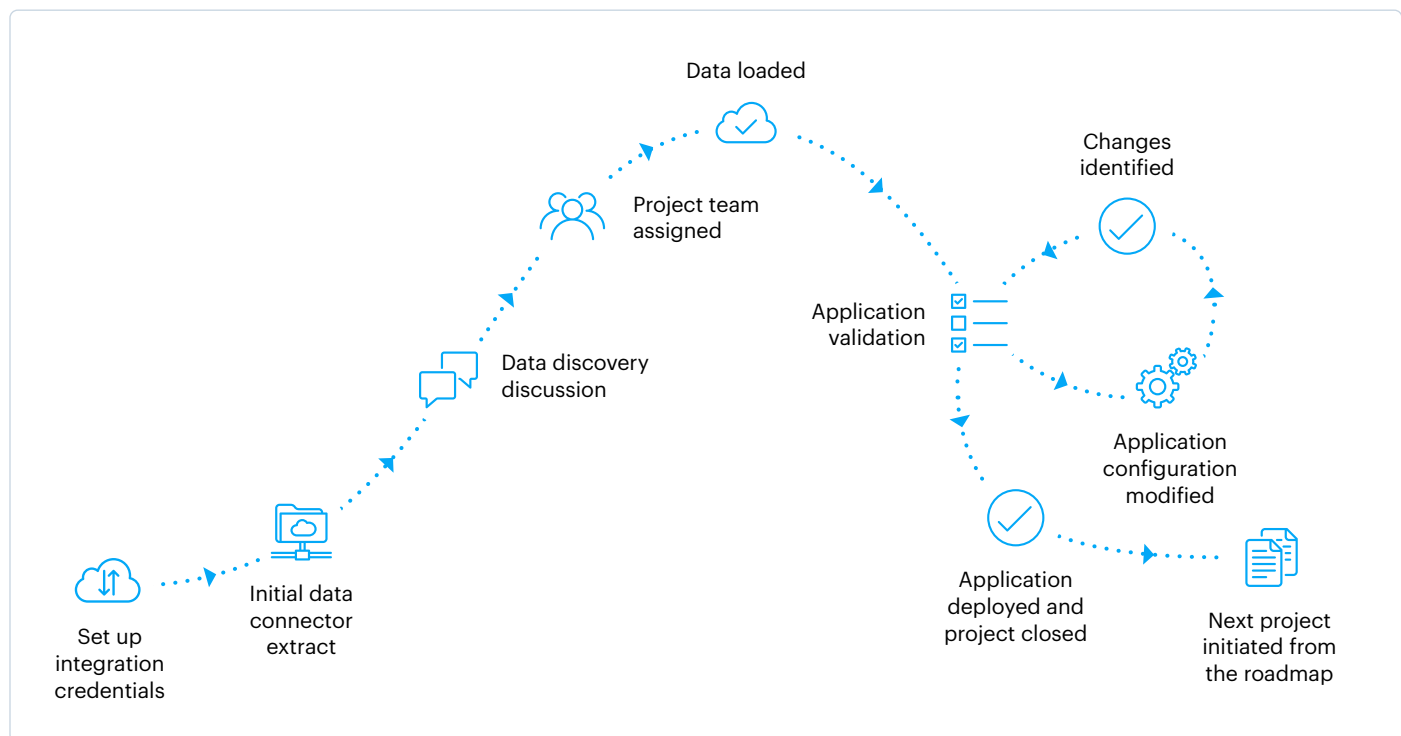
The data connector for Workday allows Visier to pull Worker and Position data for all employees in the customer's instance of Workday. Customers who use the Workday connector can reduce the number of "flat" files provided to Visier depending on the attributes loaded in Visier People. The connector pulls a full history for any employee that has had a change in their data since the previous data extraction. We call this type of extract a delta extract since it is only pulling changes to records rather than all employee records.

To pull data on all employees an extract needs to be run with an extract date that is far enough in the past as to include all current employees. The Visier connector user can pull custom attributes from Workday if provided access to the attributes by the customer. New attributes can be added going forward by updating the connector and validating that the connector is extracting the new attributes.



How does it work?

At Visier, onboarding our customers' data involves members of the Project Delivery team, including Solution Architects (SAs), Project Managers (PMs), Business Intelligence consultants (BIs), and other specific roles as needed. The following diagram shares Visier's onboarding methodology for data connectors. A detailed explanation of all elements in the diagram is shared immediately following it.



When an SA determines that it's possible to use a data connector to extract data from your system into your Visier People solution, the data connector onboarding process begins, which includes all of the following steps.

1. **Set up integration credentials**—A user is created by you in your Workday system. The credentials for the data connector—such as the endpoint from which the data is extracted—and this user's Username and Password are entered into your Visier solution. It's important that this user isn't linked to an actual employee at your organization as that employee could leave at some point in time.
2. **Initial data connector extract**—The SA runs a data extraction to both confirm that credentials are valid and determine the fields to extract from your Workday system. The fields that are extracted using the data connector during this process are the basis for the Data Discovery discussion.
3. **Data discovery call**—This discussion with you and the SA is all about the fields that the data connector can extract and the fields on which you want to report. The objectives of the Data Discovery Call include:
 - a. Identifying all the work and only the work that's required to complete the project:
 - i. Business and data requirements that are critical for going live are discussed.
 - ii. Standard and custom capabilities are identified.
 - iii. Any out of scope elements are determined and discussed.
 - b. Producing an initial project schedule that's based on what's in scope, and any identified risks and assumptions.



- 4. Project team assigned**—After the Data Discovery call concludes, a Visier project team is assigned to work with you to onboard your data using the connector. In situations where the connector data needs to be supplemented with “flat files,” an additional project is needed to onboard that supplemental data.
- 5. Data loaded**—Mappings and business rules are customized based on the connector fields confirmed in the Data Discovery call.
- 6. Application validation**—When the data load completes, Visier validates the attributes and properties to confirm that the connector data is reported accurately. After the Visier project team completes their validation, you then validate the data in your Visier solution.
- 7. Application configuration modified**—If you and the Visier project team are not satisfied with the data reported from the extraction, the application is modified to meet the project requirements. When these changes are made, the Application Validation takes place again. When the application is validated, the application is deployed and the project is closed.
- 8. Next project initiated from the roadmap**—With the current phase complete, if another project is necessary, a new Data Discovery call is initiated for the next project and the process restarts from there.

What’s required?

The customers must set up an Integration System User for Visier to interface with the Workday system. This capability requires the customer’s IT administrator to create and set up the permission of an Integration System User in their Workday system. If a customer has multiple sources, the extractor can be tasked to automatically build a linking mapping for the driving subject across these, and produce the mapping file. In addition, If there are topics and fields that are not covered by the Workday connector, the customer must supply this data using the traditional method (e.g. flat files).

