

# Workday People Sync with Calm Enterprise via SFTP

This article provides step-by-step instructions on how to configure your Workday environment to automate employee on/off-boarding by sending your Workday employee roster to Calm Enterprise via SFTP.

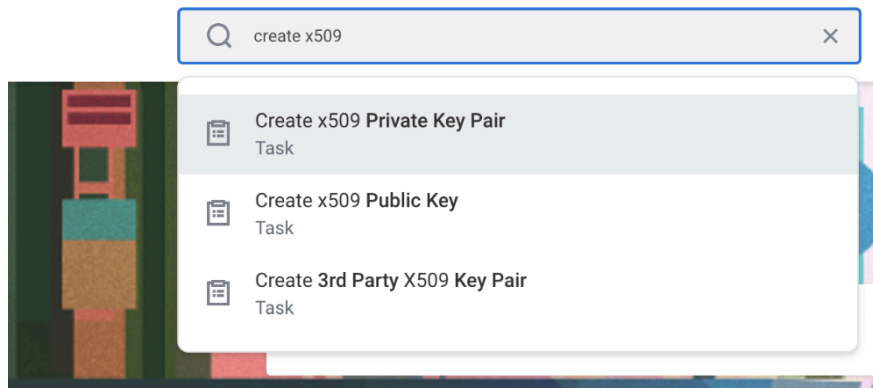
- [How to generate your SSH key](#)
- [How to create a Custom Report in Workday](#)
- [How to create an Enterprise Interface Builder \(EIB\)](#)

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## How to generate your SSH key

In order to send your employee roster file to Calm's SFTP, Workday will need secure SSH authentication. The steps below explain how to generate the SSH key for Workday and how to upload the SSH key to Calm's portal.

1. Login to your Workday tenant
2. Search for and click the task 'Create x509 Private Key Pair'



3. Give the key pair a name that is easy to search later, enter description if needed, and click 'OK'

create x509
×

## Create x509 Private Key Pair

Name \*

Description

Do Not Allow Regeneration

☐

OK

Cancel

- Workday will generate two keys (as shown in the screenshot below): a 'Public Key' and a 'RSA-SSH Formatted Key.' Copy the 'RSA-SSH Formatted Key.'

crea x509
×

## Create x509 Private Key Pair

Name

> ID

Description

(empty)

Valid From

10/15/2020

Valid To

10/15/2023

Public Key

```

-----BEGIN CERTIFICATE-----
MIIDTjCCAjagAwIBAgIGAXUrfEJ2MA0GCSqGSIb3DQEBCwUAMGxhFjAUBgNVBAMM
DSoud29ya2RheS5jb20xEDA0BgNVBAoMB1dvcmtkYXkxDTALBgNVBAAsMBGx5ZnQx
EzARBgNVBAcMCiBzZWZzYW50b24xZzAUBgNVBAGMAkNBMQswCQYDVQQGEwJVUzAe
Fw0yMDUwMTUwNzAwMDBaFw0yMDUwMTUwNzAwMDBaMGxhFjAUBgNVBAMMDSoud29y
a2RheS5jb20xEDA0BgNVBAoMB1dvcmtkYXkxDTALBgNVBAAsMBGx5ZnQxZzARBgNV
BAcMCiBzZWZzYW50b24xZzAUBgNVBAGMAkNBMQswCQYDVQQGEwJVUzCCASlwdQYJ
KoZihvcNAQEBBQADggEPADCCAQoCggEBAK3ZGue1+T4c8cTY66lqMulPAxvReBt
vfLN/LURHpgasC6kpayAD52dRkqKc71dq0cn1mEIym/YrD+0H86Fhe966VWY65FJ
Sb180qIDbGNRqVHYIH5MYA7uak76LSsC2eZA4GUys+OPzMRUVOyAjMslATdIXe
SyG8/pfS8BMs/VNWVljwmHaZJ9/63e8o7XIY7/R8llnw2u94aejkDwNsVRboY++
xbwz1hhQIWIwZLeqS7NSHTJzsfJooAU9lw1Tb9yA/212wTd8kN6Lth3/iGMyR/D
YZ4w8CEEPToI7CCS5kHQJSXQJ91FHtgt+GzG2FMJEGCqjG8HCZ/mFCUCAwEAATAN
BgkqhkiG9w0BAQsFAAOCAQEAQAMrP4Rrbh+uHsfulgaPT9Rv0t4w1VG8T8tcJqpVwB
ISS+70E0yfvN3Qc4cvgYdK6NkNrhSep8qHbWdYSJvccFRP2KHkizizVlmlwNZ7o
BqEkWm7BNH9AR508bP9D95+V7A1ah9CSRdYtqp5uccAE4qjTModOw/6TA0a/pnCF
I1H9Y0ISA4+OxKcT67+vwDwqPPmpYWh5vDqD39v73HzDnSSqym6VTxVgtUOYqghv
xu8OM86r0j2JN9Jfru1ID4uByVVz0DRG4yysD5VhD1qZMv2BhA01yL3D0JQifTcL
eeV/7FY0bkWkHViZbRkEf8L0bZ3jDTBo4alx0p9AMFAKZA==
-----END CERTIFICATE-----

```

RSA-SSH Formatted Key

```

-----BEGIN SSH2 PUBLIC KEY-----
AAAAB3NzaC1yc2EAAAADAQABAAQAC2Rmtfk+HPHE20upajl_iDwMa/0Xgbb3yzfy1ER6Y
LLAupKWeqA+dnUzKinO9XatlJ9ZhlmsJv2Kw/tB/OhYXueuVmoUrY0m9IDqIA2xJJaIR2JR+
TGAO7mpO+i7EnAtnmQ08BMrPjBzEVFTagLzK7CAE3SF3kshwP6X0vATLP11VIZY8Jh2mSff
+I3yKQ15WO/0fJSlp8NvreGno5A8DbFUW6GPvW8M9YU0ifrWS3qkuzJh0yc7HyaKAFPSMJ
dU2/cgP9tdeE3QZDei7Yd/4hjMkfw2GeMPAh8D06JewgkuZB0CU0CbNRR7YLfhaxthTCRBg
hsvBwemfShQl
-----END SSH2 PUBLIC KEY-----

```

Do Not Allow Regeneration

☐

Done

5. Create a file on your local computer in a text editor with the copied 'RSA-SSH' formatted key and name it `rsa.pub`. Then run `ssh-keygen -i -f rsa.pub` command to generate a SSH key that uses the OpenSSH format and is more secure. That command will output a new SSH key that you can use for connecting to Calm Enterprise.
6. Open the Calm Enterprise Partner Portal and click through 'Account' > 'Integration' which will take you to the SFTP sync setup page. Paste the SSH public key you generated in the previous step and click 'Upload SSH Key' button.

The screenshot shows the Calm Enterprise Partner Portal interface. On the left is a sidebar with navigation links: Home, Reporting, Pathways, Users, Account (highlighted), and Resources. The main content area is titled 'Account Details' and has tabs for 'Account Details', 'Integration' (selected), 'Branding & Benefits', 'Emails & Surveys', and 'Calm Admin'. The 'Integration' tab is active, showing the 'SFTP Integration' section. This section includes a form for 'IT Administrator email' (test@calm.com) with an 'Add admin' button. Below this is a large text area for the 'SSH key', which is currently empty. A black arrow points to this text area. Below the SSH key field is an 'Upload SSH key' button. At the bottom, there are fields for 'SFTP Username' (leprino) and 'SFTP URL' (http://sftp.atlasapp.site//leprino), each with a 'Copy' button. The page footer includes a note: 'Need more help? Please [contact](#) your Customer Success Manager.'

# How to create a Custom Report in Workday

1. In your Workday tenant, search and click the task 'Create Custom Report'
2. Enter the report details as shown in the screenshot below, then click 'OK'

The screenshot shows the 'Create Custom Report' form in a Workday interface. At the top, there is a search bar with the text 'Create cust report' and a close button. Below the search bar is a purple header with the text 'Create Custom Report'. The form contains the following fields:

- Report Name \***: A text input field.
- Report Details**:
  - Report Type \***: A dropdown menu with 'Advanced' selected.
  - Temporary Report**: A checkbox.
  - Enable As Web Service**: A checkbox.
- Data Source**:
  - Optimized for Performance**: A checkbox that is checked.
  - Data Source \***: A dropdown menu with 'All Active and Terminated Workers' selected.

Below the form, there is a note: 'Showing only Indexed Data Sources. You can unselect option "Optimized for Performance" to show all data sources.' At the bottom, there are two buttons: 'OK' (orange) and 'Cancel' (grey).

3. On the next page:
  - Add the fields that should be sent to Calm. **First Column should be the unique identifier for each employee** such as work email, employee ID, people key or other non-sensitive unique identifier.
  - For Calm Business:
    - You can pass **up to 3 additional non-sensitive attributes** for segmented reporting such as location, department, etc.
    - To customize your field names, use the 'Column Heading Overrides' column
    - If you would like only a subset of your employees to have access to Calm Enterprise, use 'Filter' to define the criteria
  - For Calm Health:

- Refer to the [Calm Health Eligibility File Set Up Guide](#)
- Please contact your internal Calm Admin if you are unsure whether to use “Standard employee roster” or “Segmented employee roster.”

Create custom report

## Edit Custom Report

Report Name  Report Tags

Report Type Advanced

Data Source All Active and Terminated Workers

Data Source Type Standard

Primary Business Object Worker

> **Additional Info**

Columns Sort **Filter** Subfilter Prompts Output Share Advanced

4 items

Order	Business Object	Field	Column Heading Override	Format
<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Worker	<input type="checkbox"/> Employee ID	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Worker	<input type="checkbox"/> First Name	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Worker	<input type="checkbox"/> Last Name	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> Worker	<input type="checkbox"/> Email - Primary Work	<input type="text"/>	<input type="text"/>

Group Column Headings 0 items

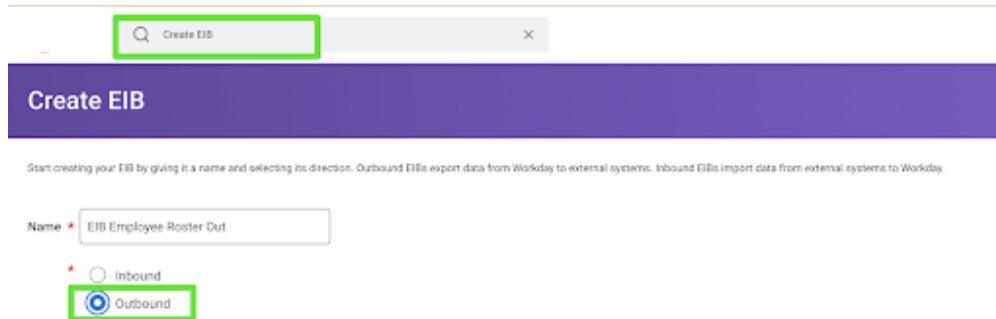
Business Object	Group Column Heading
No Data	

4. Click the 'OK' to save the report. You can test your report data by clicking the 'Run' button. If you would like to edit the report later, search and click 'Edit Custom Report,' then click 'edit' under 'Actions.'

# How to create an Enterprise Interface Builder (EIB)

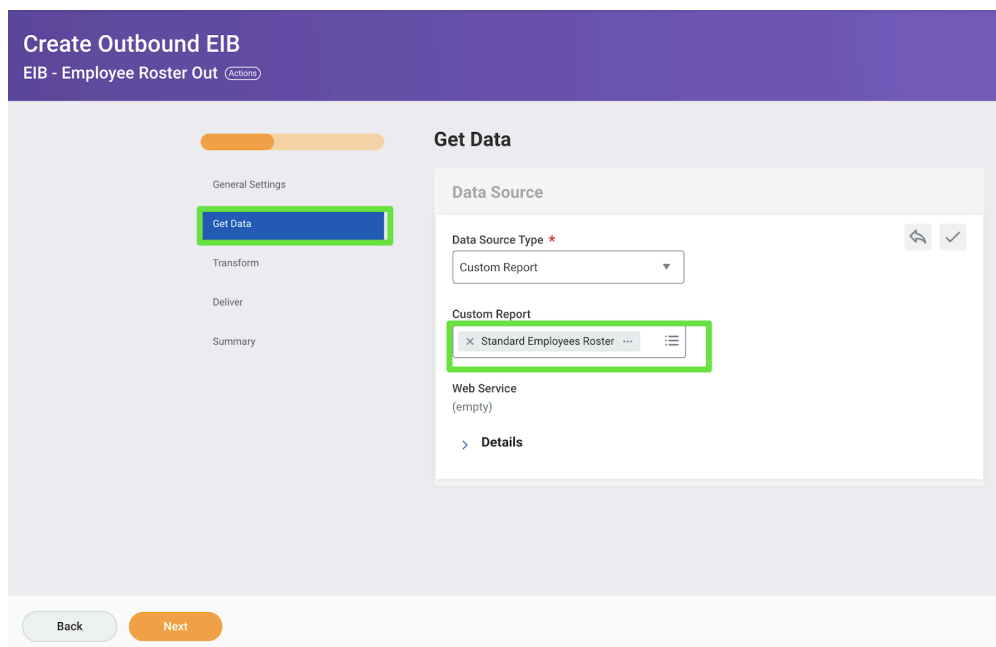
This step will enable you to send your report to SFTP on a chosen schedule.

1. In your Workday tenant, search and click 'Create EIB'
2. Fill out 'Name' field and select 'Outbound'



The screenshot shows the 'Create EIB' form. At the top, there is a search bar with 'Create EIB' entered. Below the search bar is a purple header with the text 'Create EIB'. Underneath the header, there is a small instruction: 'Start creating your EIB by giving it a name and selecting its direction. Outbound EIBs export data from Workday to external systems. Inbound EIBs import data from external systems to Workday.' The 'Name' field is filled with 'EIB Employee Roster Out'. Below the name field, there are two radio buttons: 'Inbound' and 'Outbound'. The 'Outbound' radio button is selected and highlighted with a green box.

3. On the next page, click 'Get Data' on the left side menu. in the 'Custom Report' field enter the report you created in Step 1, then click 'Next'



The screenshot shows the 'Create Outbound EIB' form. The header is purple with the text 'Create Outbound EIB' and 'EIB - Employee Roster Out' with an 'Actions' button. Below the header is a progress bar with five steps: 'General Settings', 'Get Data', 'Transform', 'Deliver', and 'Summary'. The 'Get Data' step is highlighted with a green box. To the right of the progress bar is the 'Get Data' section. It contains a 'Data Source' field with a dropdown menu set to 'Custom Report'. Below this is a 'Custom Report' field with a dropdown menu set to 'Standard Employees Roster'. This field is highlighted with a green box. Below the 'Custom Report' field is a 'Web Service' field with the text '(empty)'. At the bottom of the form are 'Back' and 'Next' buttons.

4. We recommend adding a timestamp to the file name. To so, Click 'Transform' on the left side menu, and in the 'Transformation Type' field, select 'Custom Report Transformation' and create an xslt transformation to make the custom report in CSV

format. If you do not want to add a timestamp, select “None” as Transformation Type.

5. Click 'Deliver' on the left side menu, fill in the following, then click 'Next'
  - In the 'Delivery Method' field, choose '**SFTP**'
  - Under 'SFTP Address,' enter the **SFTP URL** provided by Calm in the Partner Portal
  - Under 'Directory,' enter “**/inbound/eligibility/**”
  - Under 'Authentication Method,' choose '**SSH.**'
  - For 'User ID,' enter the Username from the Calm Partner Portal.

### Account Details

Account Details

Integration

Branding & Benefits

Emails & Surveys

Calm Admin

### Integration

#### SFTP Integration

To get started with setting up your integration you'll need to enter the contact information of your IT Administrator, and they can reference the following [instructions](#) which we'll send via email.

IT Administrator email

Add admin

Once you've generated your public SSH key please enter it here and then proceed to setup a secure file transfer to Calm using the tool of your choice and the credential information below. For technical documentation and data privacy information on our SFTP integration see our [integration doc](#).

Please ensure the file is formatted correctly by following this [example](#).

SSH key  
\*\*\*\*\*

Upload SSH key

SFTP Username  
54937072-cb3c-49ff-97a3-f04dd41fad27

Copy

SFTP URL  
sftp.ws.calm.com

Copy

Need more help? Please [contact](#) your Customer Success Manager.

**Create Outbound EIB**  
EIB - Employee Roster Out Active

**Deliver**

General Settings  
Get Data  
Transform  
**Deliver**  
Summary

**Deliver**

Delivery Method ▼  
SFTP

Delivery Details (SFTP)

SFTP Address \*

Directory

Use Temp File  
☐

Authentication Method ▼  
select: one

User Id \*

Back Next

6. After reviewing the 'Summary' page, click 'OK'
7. On the EIB Integration screen, click the 'Actions' button located in the header. On the dropdown menu, select 'Integration' and then 'Launch' to send the file to the SFTP address configured in the EIB.

**View Integration System**  
EIB - Employee Roster Out Active

**Basic Details**

System Name EIB - Employee Roster Out

**System ID**

**Configuration**

**Get Data**

Name Custom Report

Data Source Standard Employees Roster

**Details**

Deliver 1 Item

**Integration System**  
EIB - Employee Roster Out

System ID EIB-EmployeeRosterOut

Integration Template Enterprise Interface Builder

Integration Services 4 Items

Integration Template Service	Initial Service to Invoke
Builder / Launch Enterprise Interface Builder as Background Process	
Resume Events	
Enterprise Interface Builder / Document Retrieval Service	
Enterprise Interface Builder / Transformation	
Enterprise Interface Builder / Document Delivery Service	

8. Turn on People sync and launch to the whole company by contacting your internal Calm Admin. Make sure to send a file with the full roster of all eligible users if your organization has already launched Calm.