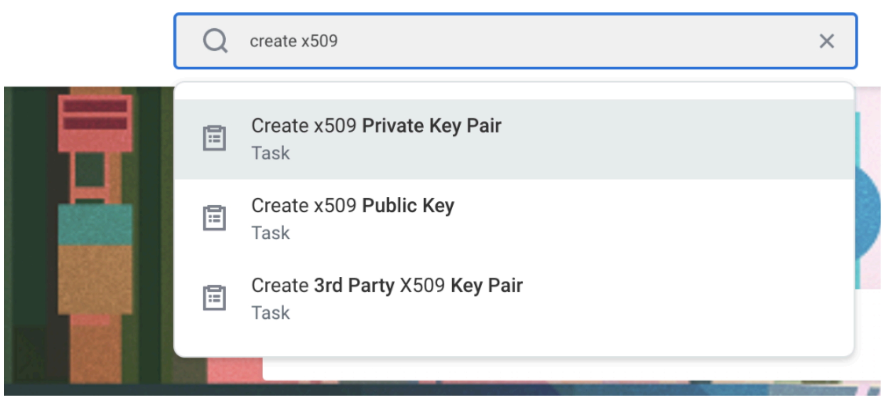
Workday People Sync with Calm Enterprise via SFTP

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.

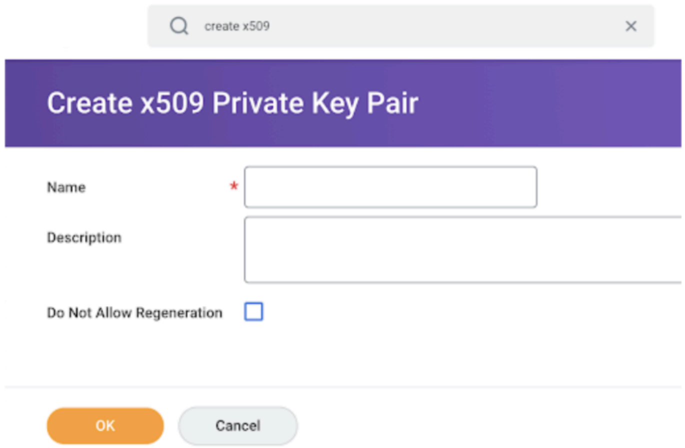
How to generate your SSH key

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.

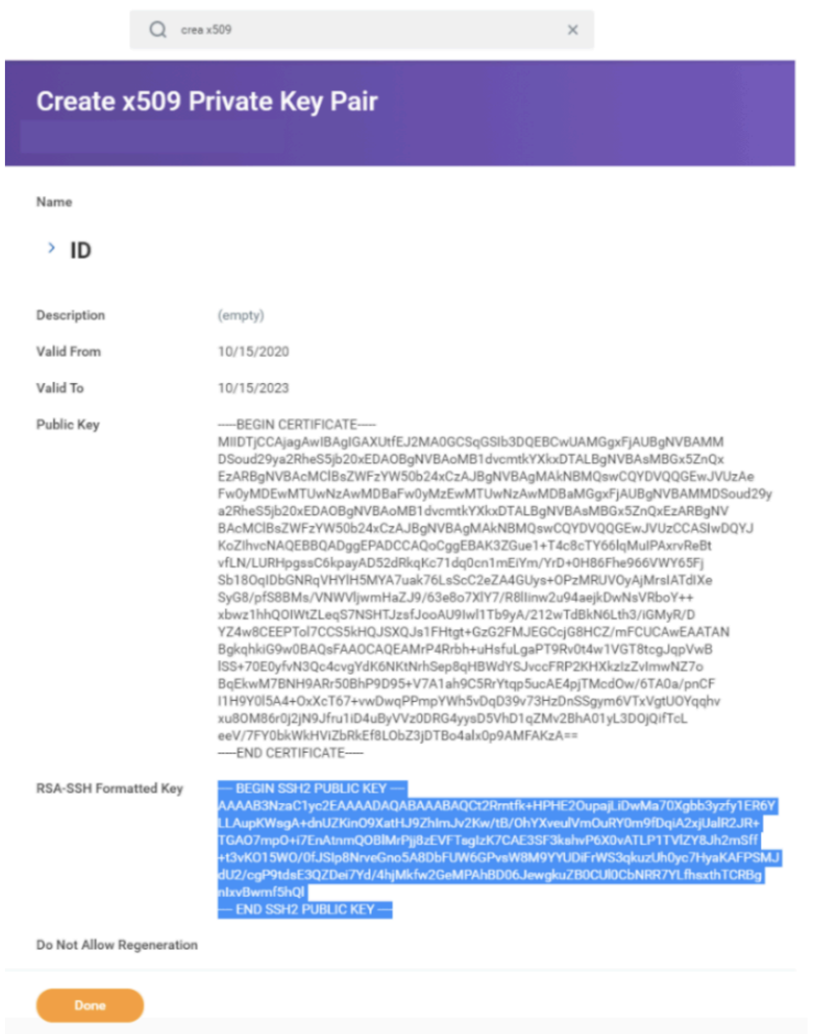
1. Login to your Workday tenant
2. Search for and click the task 'Create x509 Private Key Pair'



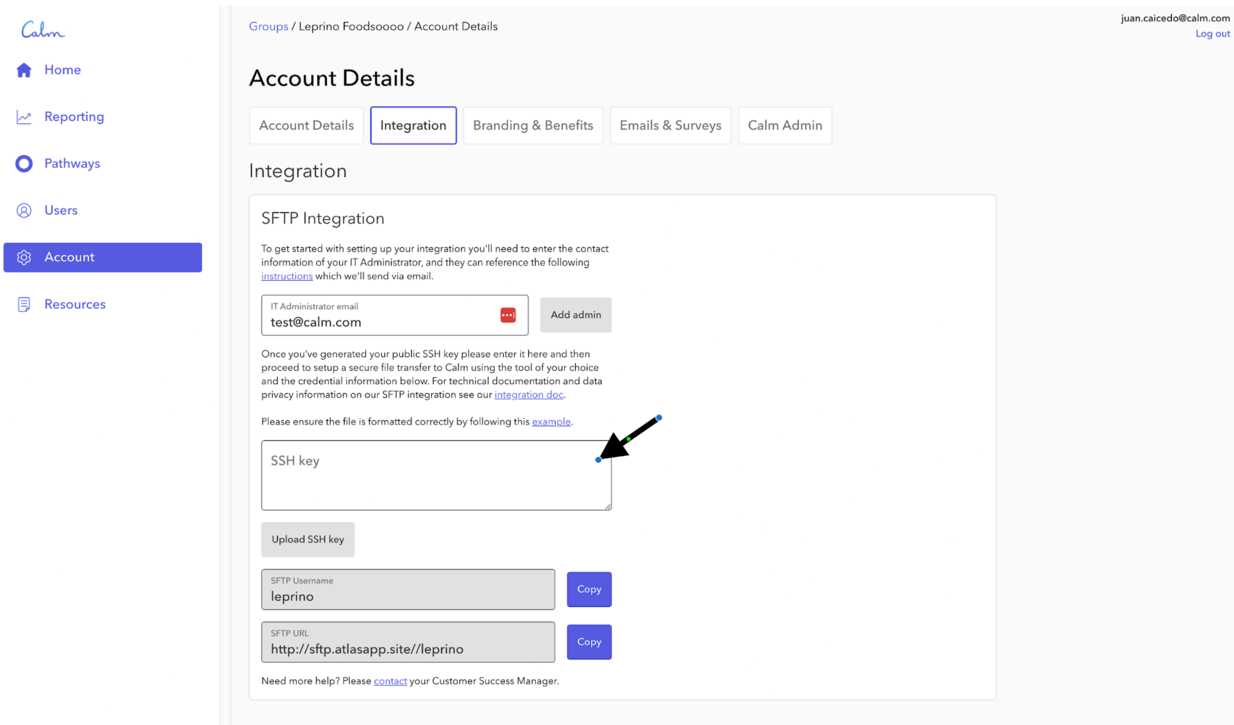
3. Give the key pair a name that is easy to search later, enter description if needed, and click 'OK'



4. 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.'

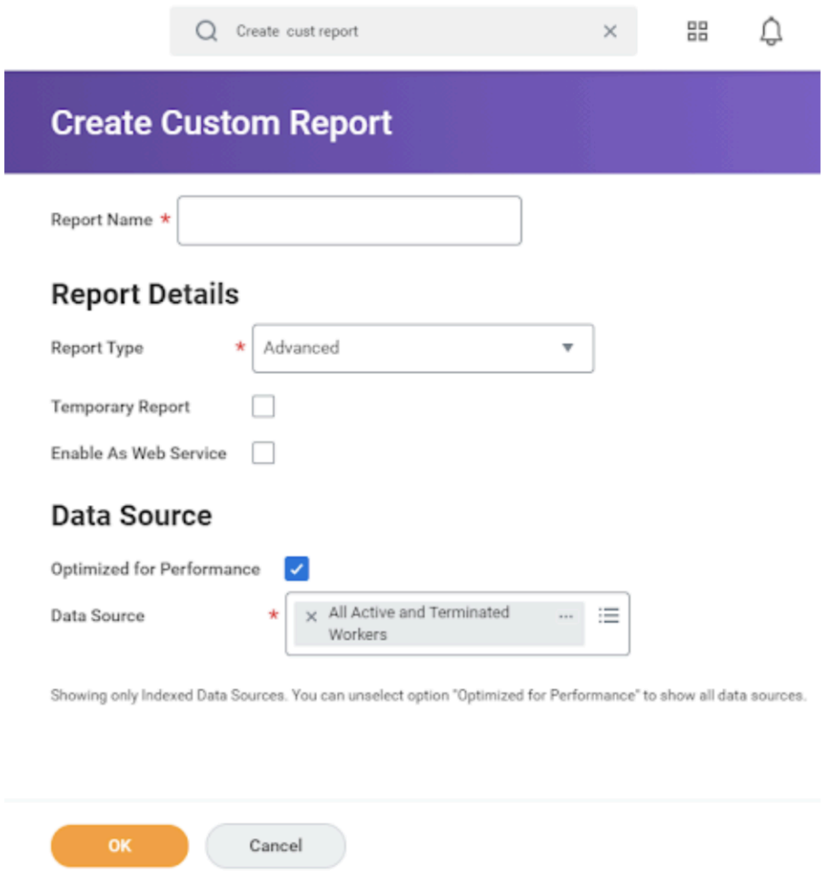


5. Create a file on your local computer in a text editor with the copied 'RSA-SSH' formatted key and name it `rsa.pub`. Then run `ssh-keygen -i -f rsa.pub` command to generate a SSH key that uses the OpenSSH format and is more secure. That command will output a new SSH key that you can use for connecting 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.



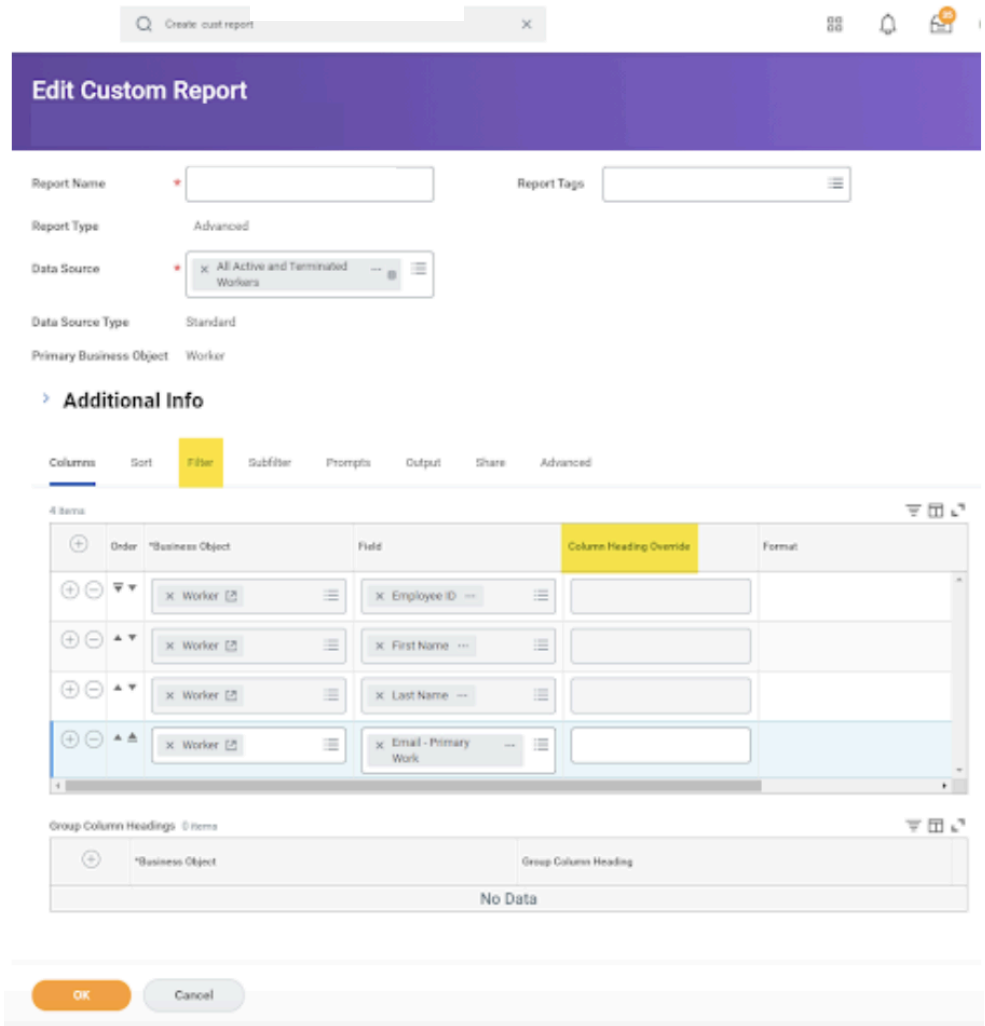
How to create a Custom Report in Workday

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'



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."

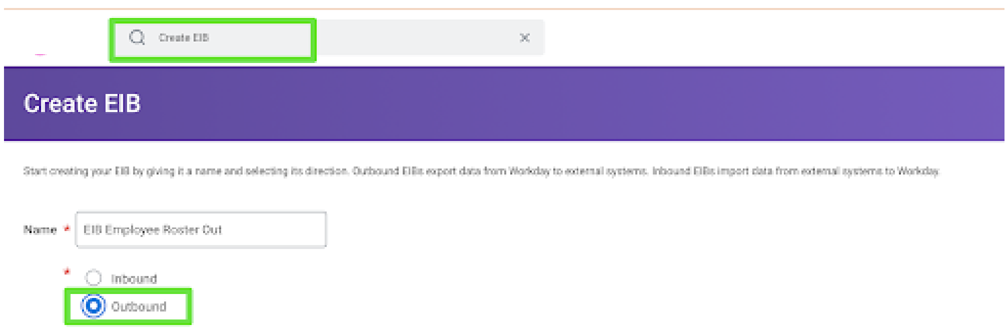


4. Click the 'OK' to save the report. You can test your report data by clicking the 'Run' button. If you would like to edit the report later, search and click 'Edit Custom Report,' then click 'edit' under 'Actions.'

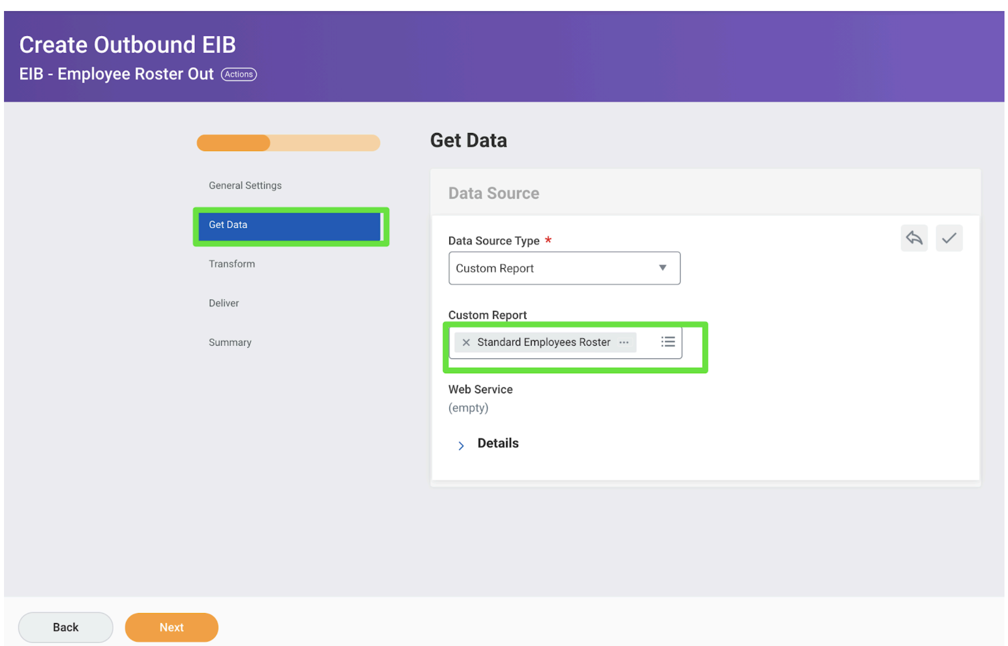
How to create an Enterprise Interface Builder (EIB)

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'



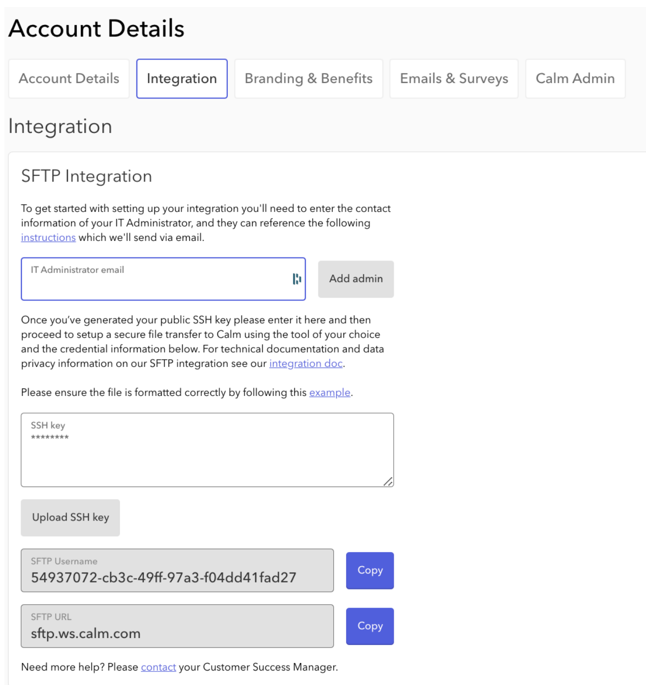
3. On the next page, click 'Get Data' on the left side menu. in the 'Custom Report' field enter the report you created in Step 1, then click 'Next'

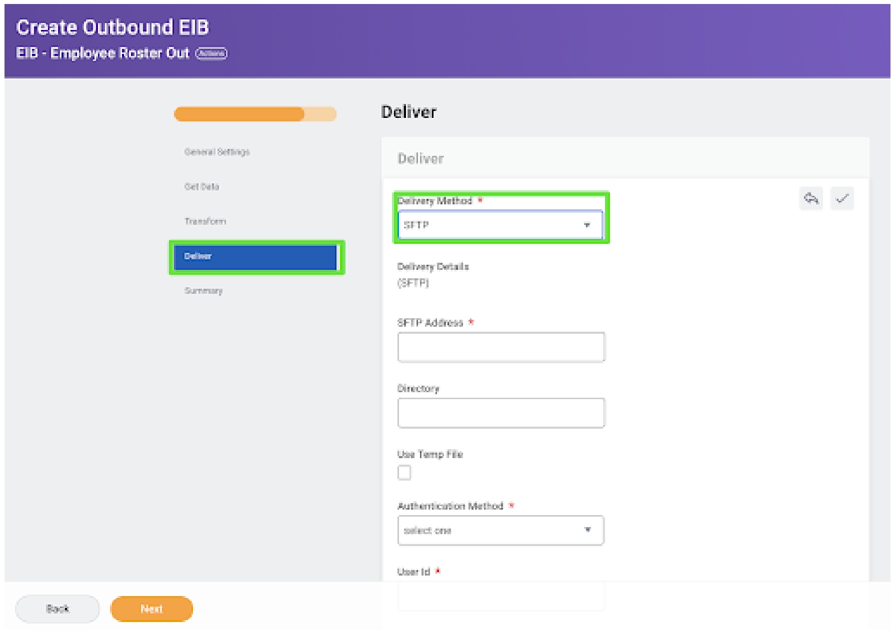


4. We recommend adding a timestamp to the file name. To so, Click 'Transform' on the left side menu, and in the 'Transformation Type' field, select 'Custom Report Transformation' and create an xslt transformation to make the custom report in CSV

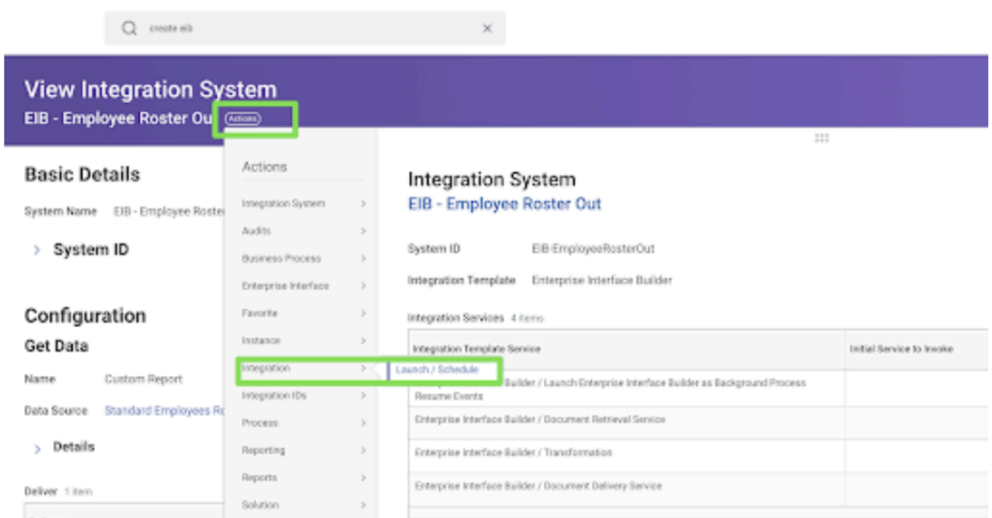
format. If you do not want to add a timestamp, select “None” as Transformation Type.

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.





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.



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.