

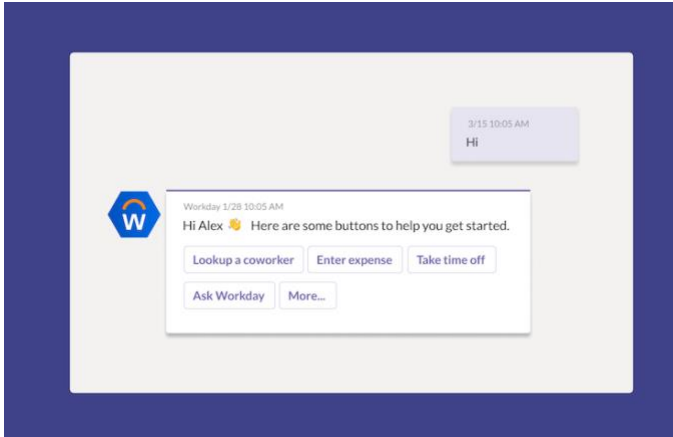


# Workday for Microsoft Teams Installation Guide

v2.1 January, 2021

# Workday for Microsoft Teams Installation Guide

---



With Workday for Microsoft Teams, you can empower your people to collaborate with less friction and complete everyday HR and Finance tasks right inside Microsoft Teams.

- **Manage Time Off**  
Quickly check your balance and book some time off. Approve time off requests with a single click.
- **Save Time on Expenses**  
Snap a picture of your receipt and let Workday create a new expense item
- **Recognize Great Work**  
Give your coworkers feedback directly from Teams and recognize a job well done
- **Get Connected**  
Easily lookup a person's Workday profile and reporting lines to communicate more effectively and get things done
- **Make your Next Hire**  
Quickly gather interview feedback on a job candidate and make your next hire

## Installation Steps

There are four steps required to install and configure Workday for Microsoft Teams:

1. [Set Up Natural Workspaces](#)
2. [Install Workday in Microsoft Teams](#)
3. [Connect to Workday](#)
4. [Configure Workday in Microsoft Teams](#)

## Installation Personas

Typically, there are three different personas required to successfully install Workday for Microsoft Teams:

1. **Workday Administrator**  
Required to configure the Workday tenant
2. **Microsoft Office365 – Teams Administrator**  
Required to install Workday and set up the permission policy
3. **Microsoft Office365 – Global Administrator**  
Required to allow the Graph API permissions for Workday

**Note:** Depending on your Office365 administrator roles, the Teams Administrator and Global Administrator may be the same person.

## Prerequisites

**Persona:** Workday Administrator

### Instructions:

1. You must sign the **Innovation Services Addendum** to use this feature. Please contact your Customer Success Manager to request the ISA document, or see [Workday Innovation Services](#) on Community.
2. We **highly recommend** you configure **Workday Assistant** in your tenant before you proceed with the steps below. Assistant is required for natural language processing and for specific features in Workday for Microsoft Teams (ie Time Off, Ask Workday). See [Set Up Workday Assistant](#) in the Administrator Guide.

## Step 1: Set Up Natural Workspaces

**Persona:** Workday Administrator

**Instructions:** follow the steps as documented in the Workday Admin Guide: <https://bit.ly/setup-nw>.

**Note:** ensure you *Activate Pending Security Policy Changes* before proceeding.

## Step 2: Install Workday in Microsoft Teams

**Persona:** O365 Teams Administrator

### Instructions:

- 2.a Go to the Microsoft Teams Admin Center
- 2.b Under Teams Apps, go to Permission Policies
- 2.c Add the Workday app to your existing Permission Policy for Third Party Apps - or create a new custom Policy. See Microsoft Docs: [Permission Policies](#)
- 2.d Under Manage Apps, click Workday to check the App Status is set to **“Allowed”**
- 2.e Assign the Permission Policy to Users – individually or using security groups. See Microsoft Docs: [Assign Permission Policy to Users](#)

**Note:** *the policy changes may take up to 24h to take effect for all users.*

## Step 3: Connect to Workday

**Persona:** O365 Global Administrator

### Instructions:

- 3.a Search for Workday under Apps in Microsoft Teams, then click Add.
- 3.b Navigate to the Workday App and type **“Hi”**
- 3.c Click the **“Check Permissions”** button and allow Workday the requested Graph API permissions<sup>1</sup>

**Persona:** Workday Administrator

### Instructions:

- 3.d Navigate to the Workday App and type **“Hi”**
- 3.e Click the **“Connect to Workday”** button and enter your tenant alias. Use the same name as your production or implementation tenant (ie globalcorp = globalcorp, globalcorp98 = globalcorp98). If you are using a sandbox environment, add ‘-sb’ to the ending (ie globalcorp-sb).

## Step 4: Configure Workday in Microsoft Teams

**Persona:** Workday Administrator

### Instructions:

- 4.a Go to the Workday App in Microsoft Teams and type **“Administration”**
- 4.b Click **“Configure”** to enable or disable individual features in Workday for Microsoft Teams
- 4.c To enable Anytime Feedback, configure your Microsoft Teams visibility settings to match the settings in Workday.
- 4.d To enable Time Off, Change Job or Ask Workday functionality, set up [Workday Assistant](#) in your tenant.

## Step 5: Pin the Workday App

**Persona:** O365 Teams Administrator

### Instructions:

- 5.a Go to the Microsoft Teams Admin Center
- 5.b Under Teams Apps > Setup Policies, add Workday to the list of Pinned Apps. **Note:** *this step is optional, but highly recommended to improve discoverability and usage of the Workday app.*

## Step 6: Set Up Notifications

**Persona:** Workday Administrator

### Instructions:

Go to the “**Set Up Notifications for Natural Workspaces**” task in your Workday tenant.

To approve or deny time off requests in Microsoft Teams, select 1 or multiple Request Time Off business process definitions and select the **Initiation** check box.

## Appendix

### A1. Change Management

**Persona:** Workday Administrator

### Instructions:

In addition to pinning the Workday app (see Step 5), we recommend you use multiple channels to announce availability of the Workday for Teams app to your employees:

- Teams Announcements
- Email or newsletter
- Support article
- Intranet
- Video

Here is a message template you can use as a starting point for your messaging on Workday Community: [Announcing Workday for Teams](#)

### A2. Microsoft Graph API Permissions

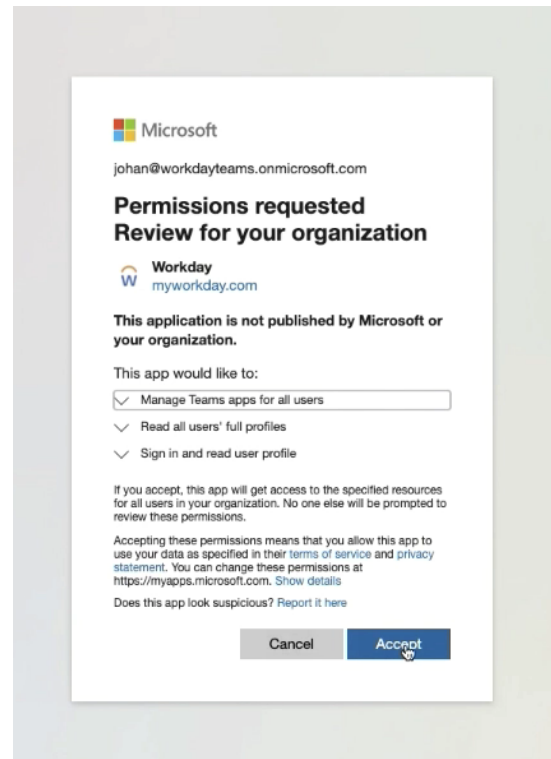
**Persona:** O635 Global Administrator

During the installation process, you will need to grant Workday the following Microsoft Graph API permissions:

- [Manage Teams apps for all users](#)
- [Read and write all users’ full profiles](#)
- [Sign in and read user profile](#)

See Microsoft Docs for more information on this step: [Overview of Microsoft Graph](#)

*Example of the dialog screen:*



If you have questions about this document or the installation process, join the **Natural Workspaces User Group** on Community: <https://bit.ly/naturalworkspaces>