Hyland for Workday (HFW) Schedule

Hyland for Workday will be installed as part of the Employee File Management solution. This will allow users to view and upload HR documents from within Workday.

Hyland for Workday is an optional offering that requires the following solution:

Hyland Care AP Services for New Workday Customer

Description of Solution

1. Users may launch HFW App from Workday HCM screen via 'View OnBase Documents' link from employee record. Authentication into Workday allows user access to the HFW App without prompting for additional credentials.

2. HR Employees with appropriate OnBase and Workday access rights may perform the following tasks on behalf of other employees within HFW App:

    A. View OnBase Documents List for employee;

    B. View thumbnail previews of documents by clicking thumbnail image;

    C. View selected documents and associated keywords by clicking 'View Document in OnBase' link to launch OnBase document viewer.

        i. Documents in viewer should have basic viewer operations (ex. Rotate, zoom in/out, fit to screen);

    D. Upload documents into OnBase via drag & drop or browsing out to file location from Workday screen;

    E. Search for specific documents via document name in the Search box.

3. Employees may perform the following tasks on behalf of themselves within HFW App:

    A. View OnBase Documents List;

    B. View thumbnail previews of documents by clicking thumbnail image;

    C. View selected documents and associated keywords by clicking 'View Document in OnBase' link to launch OnBase document viewer.

        i. Documents in viewer should have basic viewer operations (ex. Rotate, zoom in/out, fit to screen);

    D. Upload documents into OnBase via drag & drop or browsing out to file location from Workday screen;

    E. Search for specific documents via document name in the Search box.

4. Managers may perform the following tasks on behalf of their direct reports and themselves within HFW App:

    A. View OnBase Documents List;

    B. View thumbnail previews of documents by clicking thumbnail image;

    C. View selected documents and associated keywords by clicking 'View Document in OnBase' link to launch

OnBase document viewer.

       i. Documents in viewer should have basic viewer operations (ex. Rotate, zoom in/out, fit to screen);

    D. Upload documents into OnBase via drag & drop or browsing out to file location from Workday screen;

    E. Search for specific documents via document name in the Search box.

5. Mobile support for the following functions:

    A. View document list;

    B. Launch document viewer;

    C. Perform standard document zoom / rotate functions

6. Workday Configuration App for admin users that are granted access to perform light customizations including:

    A. OB instance connectivity

    B. QAV link prefix / hostname

    C. Custom Query for document retrieval

    D. Display keywords and column headings

       i. Capture

       ii. Toggle on/off

    E. Keyword values

    F. Print (toggle on/off or derive from OB permissions)

    G. Document image preview (toggle on/off)

7. User access of documents in the HFW App is controlled by the OnBase security configuration.

Assumptions for Hyland Workday

1. Solution will be configured remotely;

2. Hyland Workday is delivered as part of the Employee File Management solution.

3. Workday GUID is the link between document and the record in Workday (not employee ID):

    A. Add ID keyword to all existing docs in the system;

    B. Create Custom Query; and

    C. Workflow to update GUID on all existing documents.

4. Security updates to existing solutions other than HR (AP, Medical records, etc) will be required to ensure that they only have access to their own documents;

5. Customer has a functioning non-production environment (e.g. test) in which to develop and test the solution;

6. Scope includes configuration in one (1) test environment and migration to one (1) production environment;

7. Following software is required for HFW;

A. Hyland Identity Provider (IdP) 3.3.0+ or later;

B. Hyland API Server 21.1.9.1000 or later;

C. Hyland Configuration Service (1.1.0 or later);

D. Hyland Quick Access version 1.7.1

8. The minimum OnBase version supported for HFW App is OnBase 22.1.15;

9. Customer must also have an existing production and non-production Workday environment, along with their unique credentials for Workday;

10. If using SSO, customer will have provider setup and established. SSO configuration will be the responsibility of the Customer;

A. Support Azure AD and/or Hyland IdP only.

11. The allowed file extensions supported in viewer are png, jpg, jpeg, bmp, tiff, tif, pdf, docx, and doc (non-supported content will not display);

12. Maximum file size for upload is 10Mb

13. Supported mobile devices include:

A. iPhone 7/8/E

B. iPhone X-13

C. Samsung Galaxy and Google Pixel series Android devices

D. iPad and Android tablets

14. Prior to engagement, customer will have Document Types, keywords, AFKS, and Custom Query configured;

15. End User access to configured solution will be provided only through HFW application. It is not expected that the users will access solution through Software clients.

Exclusions for Hyland for Workday

1. WorkView triggers;

2. Workflow triggers;

3. Custom Workflow configuration;

4. Custom scripting or custom integration;

5. Creation of custom training documentation;

6. Migration of documents from Workday and importing into OnBase;

7. Upgrades; and

8. Installation and configuration of any third party software not included in this proposal.

End of Document