



**BRIDGING THE GAP IN RECRUITMENT INTEGRATION: A COMPREHENSIVE
APPROACH TO SYNCING WORKDAY AND GREENHOUSE FOR EFFECTIVE
POSITION MANAGEMENT**

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Abstract

In the era of digital transformation, organizations increasingly adopt cloud technologies such as 'Software as a Service' (SaaS) to enhance agility, lower costs, scale effectively, and reduce administrative efforts. SaaS solutions often come with built-in integrations with other SaaS offerings, minimizing the need for custom integrations. However, these integrations do not always address the real-world scenarios faced by different organizations. Workday and Greenhouse are two leading SaaS solutions used for Human Capital Management (HCM) and Applicant Tracking System (ATS), respectively. Many organizations leverage this combination to support their HCM and recruiting processes. Greenhouse offers a built-in integration solution, 'HRIS Link,' for Workday, but it has its limitations. This article examines the job overlap feature, business process workflow, custom objects, studio integration, RaaS (Report as a Service) in Workday, and HRIS Link in Greenhouse to automate the synchronization process of positions (new or backfill) from Workday to Greenhouse, when job requisitions functionality is not enabled in Workday. By utilizing the existing functionalities and features within Workday and Greenhouse, organizations can avoid the need for custom solutions or new integration products, thereby reducing their application stack and costs.

Keywords: Software as a service, Cloud technologies, Workday, Greenhouse, Human Capital Management, Applicant Tracking System, HRIS Link, Job overlap, RaaS (Report as a Service).

I. INTRODUCTION

A Human Capital Management (HCM) system integrates various HR functions such as recruiting, benefits, and payroll into a single package, thereby simplifying the management and reporting of HR activities across an organization [1,10,12,15]. While HCM systems typically excel in most HR functions, including reporting and payroll, they often fall short in the areas of recruiting and talent management [1,15]. Although the concept of an all-in-one HR platform, such as an HCM, is theoretically advantageous, it frequently proves less effective in practice, particularly in the domain of recruitment [1]. Efficient recruitment is essential for organizations to attract the right talent, enhance candidate screening and onboarding processes, and improve overall recruitment efficiency [10,12,13,14]. Errors in the recruitment process can have



detrimental consequences for organizations; rectifying these mistakes is not only costly and time-consuming but can also damage a firm's growth and reputation [14,15].

In traditional HCM models, the departure of an employee often results in the loss of all data associated with that position, including budget, benefits, and salary range [11,15]. Consequently, when an employee is promoted or leaves the organization, significant time and resources are expended on recruiting and hiring for that position rather than on recreating the associated data [11]. It is imperative that HCM software employs position management to accurately reference actual staffing levels (filled or vacant) against budgeted staffing plans [11,15].

Workday and Greenhouse are two of the most prominent SaaS products available for Human Capital Management and recruitment, respectively. Many enterprises utilize this combination for their HR operations, including recruiting, without subscribing to Workday's recruiting module. Greenhouse offers an HRIS Link integration that simplifies integration with Workday, enabling the creation of job requisitions in Greenhouse for open positions in Workday [7,9]. Although the HRIS Link integration is straightforward to configure and integrates both systems effectively [7,9], it has limitations when organizations use position management in Workday and need to backfill terminated employees using existing positions.

To address these limitations, it is advisable for organizations to design a custom solution within Greenhouse and Workday rather than purchasing an external integration product. This custom solution would leverage Workday's Business Process, Custom Objects, Studio Integration, and Job Overlap features. It would enable organizations to use the same positions for replacements and create new job requisitions for backfills. Additionally, it would automate the entire process, from creating a new position for a new hire or reopening an existing position after an employee's termination in Workday to creating a job requisition in Greenhouse. This integrated approach ensures that organizations can maintain continuity in their recruitment processes and optimize the efficiency and effectiveness of their HCM systems.

II. PROBLEM STATEMENT

Organizations utilizing Workday as their HCM system and leveraging the position staffing model for headcount management create positions within the system to track new hires. Each employee is assigned to a specific position within the organization or department, and a single position can only be occupied by one employee at a time. When a termination is initiated in the system, the position remains occupied by the employee being terminated until their termination date. This creates a challenge for organizations: they either must wait until the termination date to hire a replacement or create a new position for backfilling if they want to hire the replacement before the current employee leaves.

Workday's position staffing model can be integrated with Greenhouse Recruiting using HRIS Link [7]. Companies can choose to import positions or both requisitions and positions from Workday, depending on whether the job requisitions (recruitment module) are enabled in Workday. Many organizations opt not to subscribe to the recruitment functionality in Workday to control costs since they use a separate SaaS product for ATS, such as Greenhouse. For organizations without job requisitions enabled, only positions are imported from Workday to Greenhouse Recruiting [7]. Each new position in Workday syncs to Greenhouse Recruiting as a new job with a single opening [7], meaning the Position ID (unique in Workday) maps to the Job



Requisition ID (unique in Greenhouse). This setup, however, prevents mapping multiple positions to a single Greenhouse Recruiting job because Workday doesn't provide enough information to determine which positions should be tied together as multiple openings on one job. Additionally, a position reopened in Workday for replacement hiring cannot be used to create a new job in Greenhouse with the same Position ID because that Position ID was previously used to create a job in Greenhouse for the current or previous incumbent of the position.

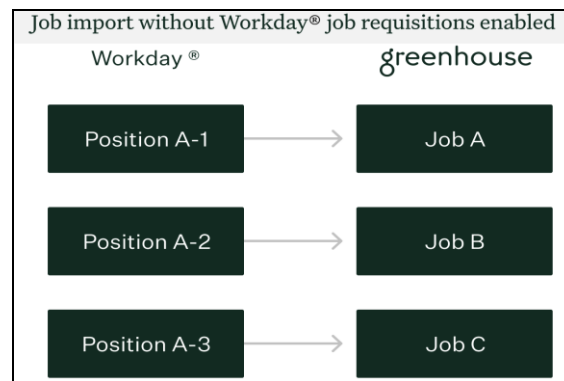


Fig1: 1:1 mapping of position to job without Workday job requisitions enabled [7]

A custom solution that involves enabling the job overlap feature, creating custom objects at the position business object, business process workflow, and studio integration in Workday can enable organizations to utilize HRIS Link without job requisitions enabled in Workday. This allows the same position to be used for replacement hiring and creates a separate backfill job requisition in Greenhouse. This way, a replacement candidate can be hired before the termination date of the current incumbent. This solution helps organizations avoid creating new positions for replacements, enabling efficient headcount management, and allows the overlap of the newly hired employee with the departing employee in the same position.

III. SOLUTION

3.1. Job Overlap in Workday

Organizations can utilize Workday's position overlap feature to accommodate various staffing needs within the position management staffing model [2]. This feature allows an organization to avoid creating a new position when an analyst is leaving soon by enabling the current and new analyst to temporarily share the same role [3]. Companies can activate the Overlap Position option in Workday for any termination scheduled for a future date [3]. During the overlap period, both workers share all security roles and manager roles associated with the position, regardless of whether multiple managers are enabled for the supervisory organization [2]. The job overlap feature is enabled through the 'Edit Tenant Setup - HCM' task [2], which is configured at the Workday tenant level.



Enable Job Overlap for Vacating Positions	<input checked="" type="checkbox"/>	?
Automatically Select Is This Position Available for Overlap on Vacating Events	<input checked="" type="checkbox"/>	?
Enable Job Overlap on Position Restrictions	<input checked="" type="checkbox"/>	?

Fig 2: Job Overlap settings in 'Edit Tenant Setup - HCM'

Senior Associate, [REDACTED] - [REDACTED] (Position Vacate: [REDACTED])

Incumbent **Position Overview**

Additional Data **Position Overview** Hiring Restrictions Qualifications Default Compensation Pre-Hires

Supervisory Organization [REDACTED]

Organization Assignments [REDACTED]

Incumbent [REDACTED]

Job Posting Title Associate, [REDACTED]

Available For Hire No

Hiring Freeze No

Available for Overlap Yes

Earliest Overlap Date [REDACTED]

Filled Positions Senior Associate, [REDACTED] (Position Vacate: [REDACTED])

Fig 3: 'Available for Overlap' flag at Position

3.2. Custom Objects & Workday Studio Integration

A custom object in Workday is a set of custom fields configured to meet specific requirements, enabling the recording of additional data that Workday-delivered fields do not cover [4]. Workday Studio, a more advanced integration tool, allows for the creation, ownership, and support of sophisticated integrations hosted and run by Workday [5]. Integrations in Workday can be launched in various scenarios, including automatically from a business process [5] triggered by a condition rule, if configured.

If job requisitions are not enabled in Workday, a combination of custom objects and Workday Studio integration can be utilized to generate job requisitions for replacement roles and sync them from Workday to Greenhouse. A custom Workday Studio integration can generate job requisition IDs for backfill positions using the position ID field in Workday. For instance, the



first backfill for a position might have the job requisition ID formatted as “<Position ID>_Backfill_1,” where <Position ID> is the Workday position ID, “Backfill” denotes the job requisition as a backfill, and “1” indicates it is the first backfill job requisition. The figures below illustrate the configuration of the custom objects ‘Job Requisition’ defined on the position business object and the values stored in the custom object at Position.

View Custom Object Job Requisition

Extends Business Object	Position
Effective Dated	No
Custom Object Name	Job Requisition
Web Service Alias	jobRequisition
Allow Multiple Instances per Object?	Yes
Security Domains	Custom Domain 108
Display Value	<input checked="" type="checkbox"/> Start Date
UI Visibility Rule	(empty)
Hide on View when Unpopulated	No

Field Definitions Usage

Field Definitions 3 items

Field Label	Field Type	Prompts	Validations	Custom Validation
Start Date	<input checked="" type="checkbox"/> Date			
End Date	<input checked="" type="checkbox"/> Date			
Job Requisition ID	<input checked="" type="checkbox"/> Text Length 200			

Fig 4: Configuration of custom object ‘Job Requisition’

Senior Associate, [Redacted] (Position Vacate: [Redacted])

Incumbent Position Overview

Additional Data Position Overview Hiring Restrictions Qualifications Default Compensation Pre-Hires Business Pro

View As Of [Redacted]

[Redacted]

Edit

Job Requisition

1 item

Start Date	End Date	Job Requisition ID
[Redacted]		Associate [Redacted]_0115_BACKFILL_1

Fig 5: Job Requisition ID value saved at Position



3.3. Business Process

A business process in Workday consists of a series of tasks that people initiate, act upon, and complete to achieve a specific business objective [6]. For a new role within the organization, the 'Create Position' business process is used to establish a new position in Workday, following the approval workflow defined in the business process configuration. Once the workflow is completed, the position is created with an 'Open' status and is ready to be synced to Greenhouse using the RaaS report in Workday.

For replacement roles, where the current incumbent is soon to be terminated, the 'Termination' business process definition should be updated to include an integration step for the custom Studio integration, which generates the backfill job requisition ID.

Step	Order	If	Delay	Type
Q	a			Initiation
Q				
Q				
Q				
Q	Configure INT244...	b2	Is Position Management?	Integration

Fig 6: Termination Business Process definition including the step for Integration

During the termination event initiated by the HR professional in Workday, there is an option to keep the position open for replacement hiring and mark it as 'available for overlap.'

Position Details

Close Position

No

Is this position available for overlap?

Yes

Fig 7: 'Close Position' and 'Position Overlap' option for the HR team during the termination event



Once the termination event is completed in Workday and if the position is marked as 'available for overlap,' the custom integration will generate and update the custom object 'Job Requisition' at the Position. This updated information will then be used to sync and create a new Job Requisition ID in Greenhouse for replacement hiring.

3.4. RasS Report and HRIS Link

Workday provides an option to enable advanced and search reports as web services, allowing access to report results through URLs [8]. These URLs can be used to integrate position data from Workday to Greenhouse. A report, titled 'jobs-import', can be created in Workday to pull all open positions, which can then be enabled as a web service for Greenhouse to pull position data from Workday and create job requisitions. The report URL from Workday is configured in Greenhouse as an HRIS link, facilitating easy import and update of jobs [9].

The report in Workday should retrieve the Position ID for newly created positions. However, if a position is being reopened for replacement hiring, it should pull the value stored in the custom object 'Job Requisition' at the Position. This can be achieved using 'Calculated Fields,' which are configurable field definitions associated with a business object that utilize data in Workday.

The figure below shows the calculated field definition, which pulls the Job Requisition ID by default but will pull the Position ID if the Job Requisition ID is blank. This helps in building the logic to create a backfill job requisition in Greenhouse if the same position is used to hire the replacement resource.

Calculated Field - Evaluate Expression

Field Name: [Redacted]

Business Object: Position Restrictions

Calculation | Additional Info | Where Used

Evaluate Expression

Field Type: Text

Business Object: (empty)

Default Value: [Job Req ID]

1 item

Condition	Return Value If Condition is True
[Job Req ID Blank]	[Position ID]

Fig 8: Definition of the calculated field



Dev Center

< Back < Back to HRIS Link

Edit Jobs

Configure Job Board

Integration Options

Job Board API

API Credentials

CSS Guide

Harvest API

URL *

https://www.workday.com/organization-xyz/jobs-import/jobs

Username *

HRIS Link ISU

Password *

.....

Save Cancel

Fig 9: Configuration of Workday Report in Greenhouse for HRIS Link [9]

3.5. Process Flow

The process begins in the Workday HCM system, where either a new position is created for a new role in the organization, or a termination event is initiated. In the case of termination, the HR team needs to specify whether the position will remain open for hiring a replacement and if the position is available for overlap in case the organization wants to start the hiring process before the termination date. In both scenarios, the system will follow the workflow defined in the business process definition.

For a new position, once it is approved, it will be included in the 'Greenhouse Job Requisitions' report and sent to Greenhouse to create a job requisition. For backfill job requisitions, an integration will be launched from the 'Termination' business process that generates and updates the job requisition ID in the custom object at the Position. Upon completion of the termination event, the position (if not closed and marked for job overlap) will be included in the 'Greenhouse Job Requisitions' report and sent to Greenhouse to create a backfill job requisition using the job requisition ID generated by the custom integration.

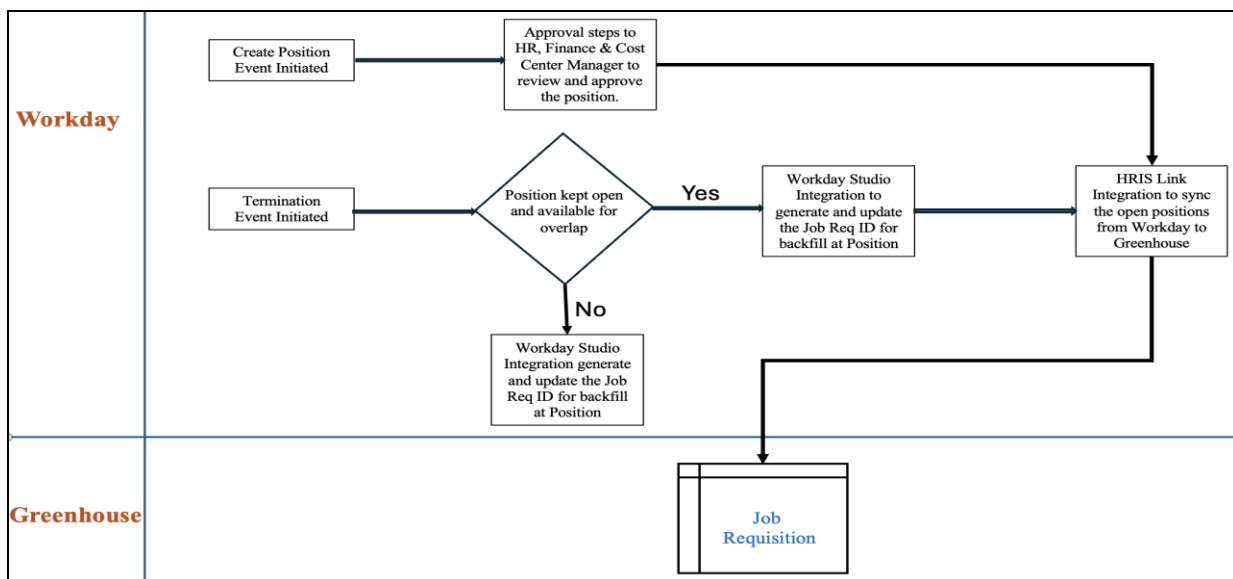


Fig 10: Configuration of Workday Report in Greenhouse for HRIS Link



IV. IMPACT

The integration of HR and recruiting functions across disparate applications such as Workday and Greenhouse is a critical need for modern organizations. Ensuring the seamless transfer of job requisition and position data between a Human Capital Management (HCM) system and an Applicant Tracking System (ATS) is essential for maintaining operational efficiency. Although Greenhouse provides an integration solution known as 'HRIS Link' for interfacing with Workday, this solution has limitations, particularly when the Workday HCM system configuration does not have job requisitions enabled.

The inability to use the same positions in Workday for creating backfill job requisitions in Greenhouse via HRIS Link presents organizations with several options, each with its own set of challenges:

1. **Manual Creation of Backfill Job Requisitions in Greenhouse:** This approach is labor-intensive and prone to human error, leading to inefficiencies and potential delays in the hiring process.
2. **Creating New Positions in Workday for Backfill:** This method can distort headcount reporting and complicate workforce planning by artificially inflating the number of positions.
3. **Building or Purchasing a New Integration Solution:** While this could address the limitations of HRIS Link, it involves significant costs and resource investment, which may not be justifiable for many organizations.
4. **Developing a Custom Solution Using Existing Features in Workday and Greenhouse:** This option, though requiring initial setup and customization, leverages existing capabilities within both systems and offers a sustainable, cost-effective approach.

Considering the implications, opting for a manual solution or creating new positions for backfill is suboptimal as they introduce inefficiencies and reporting complexities. Likewise, investing in a new integration solution may not be viable due to cost considerations. Therefore, the development of an innovative, custom solution using the existing tools and functionalities within Workday HCM and Greenhouse ATS stands out as the most prudent approach.

This proposed custom solution employs Workday's Report-as-a-Service (RaaS), custom objects, business process framework, studio integration, and job overlap features. Integrated with Greenhouse's HRIS Link functionality, it offers an automated method for creating backfill job requisitions in Greenhouse using existing positions in Workday. This approach minimizes manual effort, ensures data integrity, and eliminates the need for additional product purchases. Moreover, despite its custom nature, the solution utilizes delivered tools and features of both systems, thereby ensuring compliance with security protocols, data privacy regulations, audit requirements, and reporting standards. In summary, this custom integration not only addresses the limitations of HRIS Link but also enhances the overall efficiency and effectiveness of the recruitment process in organizations leveraging Workday and Greenhouse.



V. CONCLUSION

- **Enhanced Efficiency and Automation:** The custom solution integrates Workday's job overlap, custom objects, business process framework, Studio integration, and RaaS with Greenhouse's HRIS Link. This streamlines the creation and management of backfill job requisitions, improving overall HR and recruitment efficiency.
- **Cost-Effective and Sustainable:** By utilizing existing tools and functionalities within Workday and Greenhouse, the solution avoids the need for expensive new integrations or manual processes, thus reducing costs and maintaining sustainability.
- **Accurate Data Management:** Ensures seamless data transfer and accurate headcount reporting by allowing the reuse of existing positions for backfill roles, which supports better workforce planning and management.
- **Compliance and Security:** Adheres to security protocols, data privacy regulations, and audit requirements, leveraging built-in tools to ensure compliance and protect sensitive information.
- **Operational Efficiency and Agility:** Optimizes the use of both Workday and Greenhouse, aligning with organizational objectives and enhancing agility, scalability, and operational effectiveness in managing job requisitions and positions.

By adopting this custom integration approach, organizations can significantly improve their HR and recruitment operations, ensuring a robust, efficient, and effective process for managing job requisitions and positions.

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