Oracle® Cloud

Sync Workday Employees with ServiceNow Users

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Primary Author: Oracle Corporation

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Preface

This document describes how to install, configure, and run this recipe in Oracle Integration 3.

Topics:

- Documentation Accessibility
- Diversity and Inclusion
- Related Resources
- Conventions

Documentation Accessibility

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Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Related Resources

For more information, see these Oracle resources:

- Oracle Integration documentation in the Oracle Cloud Library on the Oracle Help Center.
- Oracle Cloud at http://cloud.oracle.com.

Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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About This Recipe

Use this recipe to synchronize employees in Workday with ServiceNow users.

> **Note:**
>
> This recipe is available as **Workday — ServiceNow | Sync Employees and Users** in the Integration Store. Oracle provides this recipe as a sample only. The recipe is meant only for guidance, and is not warranted to be error-free. No support is provided for this recipe.

Overview

This recipe synchronizes Workday employees with ServiceNow users on a scheduled basis. It creates or modifies user records in ServiceNow according to the employee data received from Workday. In addition, if a ServiceNow user creation fails, the recipe creates a corresponding ticket in ServiceNow.

To use the recipe, you must install the recipe and configure the connections and other resources within it. Subsequently, you can activate and run the integration flow of the recipe manually or specify an execution schedule for it.

The scheduled integration **Oracle Workday ServiceNow Employee Sync** reads the employee records from Workday and creates or modifies corresponding users in ServiceNow. Subsequently, if any ServiceNow user creation fails, the scheduled integration **Oracle Workday ServiceNow Emp Onboarding Ticket** reads the failed records and creates or updates corresponding tickets in ServiceNow. The app-driven integration **Oracle REST Workday ServiceNow** is triggered by each of the scheduled integration flows for their respective tasks.

Basic employee data such as first name, last name, email, and so on are synchronized between Workday and ServiceNow.

System and Access Requirements

- Oracle Integration, Version 21.4.3.0.0 or higher
- Workday
- An account on Workday with the Administrator role
- ServiceNow
- An account on ServiceNow with the Administrator role

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Before You Install the Recipe

You must perform the following configuration tasks on your Workday and ServiceNow instances in order to successfully connect to these external systems using Oracle Integration and synchronize employees and users.

Configure Workday

To access Workday using Oracle Integration and sync employees, you must perform certain configuration tasks on your Workday instance.

For general configuration tasks, see Prerequisites for Creating a Connection.

In addition, you must create an Enterprise Interface Builder (EIB) report to import and export Workday data in bulk. And, before you create an EIB report, you must create a custom report with custom fields, calculated fields, and business objects.

1. Create custom fields.
    a. In Workday, obtain access to **Create Custom Object**.
    b. Select **Workday Object** as **Worker (Effective Dated)** and **Custom object Name** as **SN_TicketId**.
    c. Select the values as below.
        - **General Settings**

Custom Object Name	Custom Object Name	**SN_TicketId**
Web Service Alias	ID	snTicketId
Allow Multiple Instances per Object?		No

        - **Field Definitions**

Current Fields	Field Label	**SN_TicketId**
	Field Type	Text

        - **Permissions**

Security	Domain	Person Data: Personal Data, Person Data: Personal Information

        - **Edit Custom Fields**

Edit Custom Fields	Display Value	**SN_TicketId**

    d. In Workday, search for **Edit Worker additional data business process**.
    e. In the **Edit worker additional data business process**, go to **Action** and click **Edit definition**.

f. Add a new step and select values as below.

> **Note:**
>
> In **Group** column, select the **Security Group** which should be allowed to edit the custom field.

Step	Order	Type	Specify	Optional	Group	All	Run as User	Due Date	Due Data Is Based On Effective Date	Complete
	a5	Edit Additional Data	**SN_TicketId**	No	HR Administrator					

g. Click **OK**.

Similarly, create custom fields to store **Ticket_ErrorMessage**, **User_ErrorMessage** and **ServiceNowUserId**.

> **Note:**
>
> Provide **Get access of Person Data: Personal Data, Person Data: Personal Information to ISU user** being used for getting data from custom report.

2. Create calculated fields.

   a. In the quick find box, search for **Create Calculated Fields** task.

   b. In the pop-up window, enter the **Field name**. For example: `CF_new_hire_or_updated`. Also, select the **Business Object** as **Worker**, and **Function** as **Evaluate Expression**.

   c. Click **OK**. You are redirected to **Create Calculated Field - Evaluate Expression** page.

   d. Under Calculation, select the **Field Type** as **Text** and **Default Value** as **Empty String**.

   e. In the Condition column, create the following calculated fields:

      - **CF-T/F_oic_updated**

And/Or	(Field	Calculated Field Details	Operator	Comparison Type	Comparison Value	)
And	**CF_Legal_name_change**	**Business Object**: Worker **Source Field**: Worker History **Related Business Object**: Action Event **Condition**: CF_legal_name_change? **Sort Field**: Effective Date **Sort Direction**: Descending (Z to A) **Instance to be Returned**: First Occurrence **Function**: True or False	is not empty	NA	NA	
Or	**CF_new_event_exist**	**Business Object**: Worker **Source Field**: Worker History **Related Business Object**: Action Event **Condition**: CF_effective date range **Fields To Aggregate**: Business Process Event **Function**: True or False	is not empty	NA	NA	
Or	(**CF_usererrormsg**	**Business Object**: Worker **Lookup Field**: Worker Additional Data **Related Business Object**: Worker Custom Data Snapshot **Return Value**: User_ErrorMessage **Function**: True or False	equal to	Value specified in this filter	User failed	
And	**CF_user_ticket_error**	**Business Object**: Worker **Lookup Field**: Worker Additional Data **Related Business Object**: Worker Custom Data Snapshot **Return Value**: Ticket_ErrorMessage **Function**: True or False	equal to	Value specified in this filter	Ticket failed	)

- **CF_legal_name_change?**

And/Or	(Field	Calculated Fields Details	Operator	Comparison Type	Comparison Value	)
And	**Business Process Type**	**Business Object**: Event **Function**: True or False	in the selection list	Value specified in this filter	Legal Name Change	

And/Or	(Field	Calculated Fields Details	Operator	Comparison Type	Comparison Value	)
And	**Status**	**Business Object**: Event **Function**: True or False	greater than or equal to	Value specified in this filter	Successfully Completed	
And	**Effective Date**	**Business Object**: Action Event **Function**: True or False	greater than or equal to	Value from another field	Prompt-Start Date	

- **CF_oic_is_new_hired?**

And/Or	(Field	Calculated Fields Details	Operator	Comparison Type	Comparison Value	)
And	**Hire Date**	NA	greater than or equal to	Value from another field	Prompt-Start Date	
And	**CF_Legal_name_change**	**Business Object**: Worker **Source Field**: Worker History **Related Business Object**: Action Event **Condition**: CF_legal_name_change? **Sort Field**: Effective Date **Sort Direction**: Descending (Z to A) **Instance to be Returned**: First Occurrence **Function**: True or False	is empty	NA	NA	
And	**CF_new_event_exist**	**Business Object**: Worker **Source Field**: Worker History **Related Business Object**: Action Event **Condition**: CF_effective date range **Fields To Aggregate**: Business Process Event **Function**: True or False	is empty	NA	NA	

f. In the **Return Value If Condition is True** column, create the following calculated fields.

Calculated Field	Details
CF_oic_updated	**Business Object:** Worker **Text Constant**: Updated
CF_oiC_NEW_HIRED	**Business Object**: Worker **Text Constant**: NEW HIRE

Configuration details for other related calculated fields are listed below.

Calculated Field	Details
CF_legal_name_change	**Business Object**: Worker **Source Field**: Worker History **Related Business Object**: Action Event **Condition**: CF_legal_name_change? **Sort Field**: Effective Date **Sort Direction**: Descending (Z to A) **Instance to be Returned**: First occurrence **Function**: True or False
CF_Ticket_ErrorMessage?	**Business Object**: Worker **Function**: Lookup Related Value **Lookup Field**: Worker Additional Data **Related Business Object**: Worker Custom Data Snapshot **Return Value**: Ticket_ErrorMessage
CF_work_email	**Business Object**: Worker **Function**: Lookup Value As Of Date **Source Field**: Email – Work **Data As Of**: Effective Date: empty **Data Entry Date**: Entry Date: CF_Last_Functionally_updated_-1millisecond
CF_Last_Functionally_updated_-1mili second	**Business Object**: Global **Function**: Increment or Decrement Date **Date Field**: Last Functionally Updated **Milliseconds to Add or Subtract**: -1 **Return Blank Date on Error**: Yes
CF_proposed_Supervisory Organization	**Business Object**: Worker **Function**: Lookup Value As Of Date **Source Field**: Supervisory Organization **Data As Of**: Effective Date: empty **Data Entry Date**: Entry Date: CF_Last_Functionally_updated_-1mili second

Calculated Field	Details
CF_proposed_Phone - Primary Work	**Business Object**: Worker **Function**: Lookup Value As Of Date **Date Source Field**: Phone - Primary Work **Data As Of**: Effective Date: empty **Data Entry Date**: Entry **Date**:CF_Last_Functionally_updated_-1mili second
CF_User_ErrorMessage?	**Business Object**: Worker **Function**: Lookup Related Value **Lookup Field**: Worker Additional Data **Related Business Object**: Worker Custom Data Snapshot **Return Value**: User_ErrorMessage
CF_previous_business_title	**Business Object**: Worker **Function**: Lookup Value As Of Date **Source Field**: Business Title **Data As Of**: Effective Date: empty **Data Entry Date**: Entry Date:CF_Last_Functionally_updated_-1mili second

Also, configure the following calculated fields with the following conditions.

- **CF_effective date range**

And/Or	(Field	Calculated Field Details	Operator	Comparison Type	Comparison Value	)
And	**Business Process Definition**	**Business Object**: Action Event **Function**: True or False	in the selection list	Value specified in this filter	• Change Job (Default Definition) • Change Job for Global Modern Services • Change Job for IT Services Group • Change Job for Sales • Change Organization Assignments for Worker (Default Definition) • Change Organization Assignments for Worker for Field Sales - North America Group • Change Organization Assignments for Worker for Global Modern Services • Change Organization Assignments for Worker for Marketing • Change Organization Assignments for Workers by Organization (Default Definition) • Change Organization Assignments for Workers by Organization for Global Modern Services • Contact Change (Default Definition) • Edit Worker Additional Data Event (Default Definition) • Edit Worker Additional Data Event for Global Modern Services • Move Worker (Supervisory) (Default Definition) • Move Worker (Supervisory) for Global Modern Services • Move Workers (By Organization) (Default Definition) • Move Workers (By Organization) for	

And/Or	(Field	Calculated Field Details	Operator	Comparison Type	Comparison Value	)
					Global Modern Services • Move Workers (Supervisory) (Default Definition) • Move Workers (Supervisory) for Global Modern Services • Personal Information Change (Default Definition) • Personal Information Change for Global Modern Services • Switch Primary Job (Default Definition) • Switch Primary Job for Global Modern Services • Title Change (Default Definition) • Title Change for Global Modern Services • Work Contact Change (Default Definition)	
And	**Status**	**Business Object**: Action Event **Function**: True or False	equal to	Value specified in this filter	Successfully Completed	
And	**Effective Date**	**Business Object**: Action Event **Function**: True or False	greater than or equal to	Value from another field	Prompt - Start Date	

3. Create a custom report.
   a. Log in to the Workday instance.
   b. In the quick find box, search for **Create custom report**.
   c. In the Create Custom Report window:
      i. Enter the **Report Name**. For example: `RPT_new_hire_report`.
      ii. Select the **Report Type** as **Advanced**.
      iii. Check the **Enable As Web Service** box.
      iv. Uncheck the **Optimized for Performance** box.
      v. Select the **Data Source** as **Active and Terminated Workers**.
      vi. Click **OK**. You are redirected to Edit Custom Report page.

vii. Under the **Columns** tab, add the **Fields** and **Custom Field**s required for the Workday employee details along with the calculated fields with the relevant **Business Object**.

Business Object	Fields	Column Heading Override XML Alias
Worker	**Employee ID**	Employee_ID
Worker	**First Name**	firstName
Worker	**Last Name**	lastName
Worker	**Email - Work**	Email_-_Work
Worker	**Hire Date**	Hire_Date
Worker	**Worker Type**	Worker_Type
Worker	**Business Title**	businessTitle
Worker	**Supervisory Organization**	Supervisory_Organization

> **Note:**
>
> Choose **Column Heading Override** as **Department**.

Worker	**Phone - Primary Work**	primaryWorkPhone
Worker	**CF_new_hire_or_updated**	CF_new_hire_or_updated
Worker Additional Data	**ServiceNowUserId**	servicenowuserid
Worker Additional Data	**SN_TicketId**	snTicketid
Worker Additional Data	**User_ErrorMessage**	userErrormessage
Worker Additional Data	**Ticket_ErrorMessage**	ticketErrormessage

d. Click **OK**.

e. In Group column heading section, select all business object as below. (Group Column Heading for each business object will be blank)

Group Column Headings

Business Object	Group Column Heading	Group Column Heading XML Alias
Worker Additional Data		Worker_Additional_Data_group

f. After creating custom reports, you can specify how the report results should be sorted.

g. Under the **Filter** tab, add the **Fields** and **Custom Fields** required for the Workday employee details along with the calculated fields with the relevant **Business Object**.

And/Or	(Fields	Operator	Comparison Type	Comparison Value	)
And	**Terminated (based on report date)**	equal to	Value specified in this filter	NA	

And/Or	(Fields	Operator	Comparison Type	Comparison Value	)
And	(**Hire Date**	greater than or equal to	Prompt the user for the value	Default Prompt	
Or	**CF_Legal_name_change**	is not empty	NA	NA	
Or	(**CF_new_event_exist**	is not empty	NA	NA	
And	(**Email - Work**	none in the selection list	Value from another field	CF_work_email	
Or	**CF_Ticket_ErrorMessage?**	equal to	Value specified in this filter	ticket failed	
Or	**CF_User_Error Message?**	equal to	Value specified in this filter	user failed	
Or	**Business Title**	not equal to	Value from another field	CF_previous_business_title	
Or	**Supervisory Organization**	not in the selection list	Value from another field	CF_proposed_Supervisory Organization	
Or	**Phone - Primary Work**	not equal to	Value from another field	CF_proposed_Phone - Primary Work	)))

h. In the Prompts section, check the **Populate Undefined Prompt Defaults** box.

> **Note:**
>
> The data source **Active and Terminated Workers** uses built-in prompts such as **Start Date**, **End Date**, and so on. Based on the report you have chosen, Workday prompts you to fill in specific reporting criteria.

4. Create an EIB report.
   a. Log in to the Workday instance.
   b. In the quick find box, search for **Create EIB** task.
   c. Enter the **Name** of the EIB task (**EIB_new_hire_report**).
   d. In the **Create EIB** pop-up, choose **Outbound** and click **OK**.
   e. In the **General Settings**, enter comments and then click **Next**.
   f. Under the **Get Data** tab, select the **Data Source Type** as **Custom Report**.
   g. Select the **Custom Report** as **RPT_new_hire_report** and then click **Next**.
   h. Under the **Transform** tab, select the **Transformation Type** as **New Custom Report Transformation**, then click **Next**.
   i. Under the **Deliver** tab, perform the following steps.
      i. Select the **Delivery Method** as **Workday Attachment**.
      ii. Enter the **File Name** with the relevant file extension. For example, `output.csv`.

iii. Specify the **Document Retention Policy (in Days)** as **should be less than 180**, and then click **Next**.

iv. In the **Details** section, select the **MIME Type** as **CSV**.

v. Click **Next**.

j. Under the **Review and Submit** tab, verify the details, then click **OK**.

k. Once you create the EIB report, the **View Integration System** window appears. In the top-left corner, click the ellipsis next to the EIB task name, choose **Enterprise Interface**, and then select **Configure Transformation**.

l. In the **Configure Transformation** window, update the report transformation details, click **OK**, and then click **Done**.

m. In the **View Integration System** window, in the top-left corner, click the ellipsis next to the EIB task name, choose **Integration**, and then select **Launch/Schedule**.

n. In the **Launch/Schedule Integration** pop-up, select the **Run Frequency** as **Run Now**, and then click **OK**.

o. In the **Schedule an Integration** window, specify the **Start Date** and **Hire Date**, and then click **OK**.

The EIB report gets generated.

Configure ServiceNow

You can use admin account credentials or custom account credentials while configuring the ServiceNow connection in Oracle Integration.

If you do not want to use an admin account, create a custom integration user and assign the required role and permissions to the user. For information about creating a custom user, see Prerequisites for Creating a Connection.

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Install and Configure the Recipe

On your Oracle Integration instance, install the recipe to deploy and configure the integration and associated resources.

1. On the Oracle Integration Home page, in the **Use a recipe/accelerator** section, click **View all**.
2. Find the recipe you want to install, then click **Get**.

   A message confirms that the recipe was successfully installed, and the recipe card shows **In use**.

3. Click **Configure**  on the recipe to configure its resources.

   The project workspace opens, displaying all the resources of the recipe. Configure the following resources before you activate and run the recipe.

Configure the Oracle REST Connection

1. In the Connections section, click the connection name.
2. In the Properties section, enter the following details:

Field	Information to Enter
Connection Type	Select **REST API Base URL**.
Connection URL	Enter your Oracle Integration instance URL. For instance, `https://<instance-name>.com/`.

3. In the Security section, enter the following details:

Field	Information to Enter
Security Policy	Select **Basic Authentication**.
Username	Enter the username of your Oracle Integration account.
Password	Enter the password of your Oracle Integration account.

4. Click **Save**. If prompted, click **Save** again.
5. Click **Test** to ensure that your connection is successfully configured. In the resulting dialog, click **Test** again.

   A message confirms if your test is successful.

6. To return to the project workspace, click **Go back** .

Configure the Oracle Workday Connection

1. In the Connections section, click the connection name.
2. In the Properties section, enter the following details:

Field	Information to Enter
Hostname	Enter the Workday host name. For example: `https:// wd2-impl-services1.workday.com`.
Tenant Name	Enter the tenant name of the account created for Oracle Integration on Workday. See Configure Workday.

3. In the Security section, enter the following details:

Field	Information to Enter
Security Policy	Select **Workday Username Token Policy**.
Workday Integration User	Enter the user name of the account created for Oracle Integration on Workday. See Configure Workday.
Password	Enter the password of the account created for Oracle Integration on Workday.

4. Click **Save**. If prompted, click **Save** again.
5. Click **Test** to ensure that your connection is successfully configured. In the resulting dialog, click **Test** again.

   A message confirms if your test is successful.
6. To return to the project workspace, click **Go back** .

Configure the Oracle ServiceNow Connection

1. In the Connections section, click the connection name.
2. In the Properties section, enter the following details:
   - In the **ServiceNow Instance Name** field, enter your ServiceNow instance URL. For example, `https://instance_name.service-now.com`.
3. In the Security section, enter the following details:
   - In the **Username** and **Password** fields, enter your ServiceNow username and password.
4. Click **Save**. If prompted, click **Save** again.
5. Click **Test** to ensure that your connection is successfully configured. In the resulting dialog, click **Test** again.

   A message confirms if your test is successful.
6. To return to the project workspace, click **Go back** .

Configure the Lookup Table

The recipe contains the following two lookup tables. Edit them as necessary.

- **ORACLE-BRT-LOOPCOUNT_LOOKUP**: Use this lookup to configure the loop count, Workday EIB report name, and employee types.

Property	Description	Value
LoopCount	Specify the maximum number of iterations for a loop.	`10`
WorkdayReportName	Specify the name of the Workday EIB report.	`EIB_new_hire_report`
EmployeeType	Specify the type of the employee.	`Employee_ID`

- **ORACLE-BRT-WD_SERVICENOW_LOOKUP**: Use this lookup to map the priority and department between Workday and ServiceNow.

Property	Description	Value	WD_Value	SN_Value
Priority	Priority Values mapped between Workday and ServiceNow.	2-High	Sales	Sales

1. In the Lookups section, click the lookup name.
2. In the **Value** column, enter or map the appropriate values for the properties.
3. Click **Save**. If prompted, click **Save** again.
4. To return to the project workspace, click **Go back** .

4 Activate and Run the Recipe

After you've configured the connections and other resources, you can activate and run the recipe.

1. In the project workspace, click **Activate**. In the Activate project panel, with the default project deployment selected, choose an appropriate tracing option, then click **Activate**.

   A message confirms that the integration has been activated. Refresh the page to view the updated status of the integration.

2. Update property values for the **Oracle Workday ServiceNow Employee Sync** integration flow. You can update the integration properties only after activating this flow.

Integration Property	Description
EmailTo	Specify the email address to which run-time exception emails are sent. Enter an email address of your choice.
RetryCount	Specify the number of possible retries if any record fails while creating resources at run time.
workdayTimeZoneDuration	This integration property converts Oracle Integration time zone to Workday tenant time zone. User can configure this value.

   For the procedure to update the integration properties, see Steps 7 to 9 in Override Design-Time Properties in an Integration.

3. Run the integration **Oracle Workday ServiceNow Employee Sync** to create or modify users in ServiceNow according to the employee data received from Workday. This integration triggers the **Oracle REST Workday ServiceNow** integration.

   a. In the Integrations section of the project workspace, click **Actions** ⋮ on the integration flow, then select **Run**.

      The Configure and run page is displayed, where you can specify a value for the `LastRunTime` parameter.

      The `LastRunTime` parameter stores the date and time of the most-recent successful run of the integration flow. The parameter's value is automatically updated after each successful run, and only the Workday employee records created after the date-time stamp stored as the parameter's **Current Value** are processed by the integration in each run. If you want to change the date-time stamp for a specific scenario, enter the date and time of your choice in the **New Value** field in the format, `yyyy-MM-dd HH:mm`. To fetch all the employee records from the beginning, set the value as `zero`.

   b. On the Configure and run page, click **Run**.

      You've now successfully submitted the integration for execution.

> **Note:**
>
> You can also schedule this integration to run at a date, time, and frequency of your choosing. See Define the Integration Schedule.

4. Run the integration **Oracle Workday ServiceNow Emp Onboarding** to create tickets in ServiceNow for the failed Workday employee records. This integration triggers the **Oracle REST Workday ServiceNow** integration.
   a. In the Integrations section of the project workspace, click **Actions** ... on the integration flow, then select **Run**.
   b. On the Configure and run page, click **Run**.

      You've now successfully submitted the integration for execution.
5. Monitor the running of the integration flow in Oracle Integration.
   a. In the project workspace, click **Observe**. You'll see the integration flow being triggered and running successfully.
   b. To manage errors in your project, see Manage Errors in a Project.

      The recipe now synchronizes employees in Workday with ServiceNow users.
6. Log in to ServiceNow and check for the employee records created or modified and the corresponding tickets created.
   a. View the employee records.
      i. In the **Filter** box, search for **Users**.
      ii. Under **Organization**, select **Users**.

      You can see the list of users created or modified.
   b. View the tickets created.
      i. In the **Filter** box, search for **HR Case**.
      ii. Under **All HR Cases**, click **All**.

      You can see a list of all the tickets created.

Related Documentation

- *Using the Workday Adapter with Oracle Integration 3*
- *Using the ServiceNow Adapter with Oracle Integration 3*