Anjum Shams

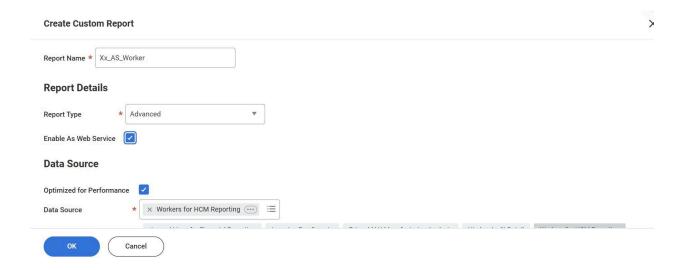# Workday Prism Training Assignment: (Fundamentals of Workday)
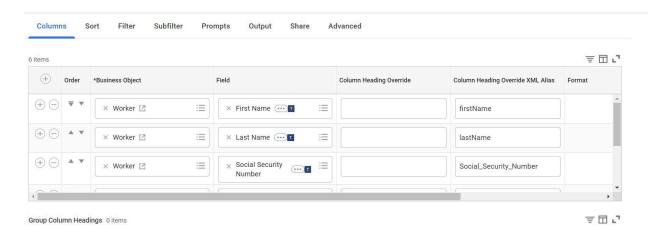
Problem Statement:
Create 2 advanced reports, enable them as web services, and then create an integration to send data from Workday to another system. Additionally, build an integration to import data into Workday. Use 2 different business objects/data sources to create the reports, ensuring each report includes 2 calculated fields.

Solution:

First Report: Xx_AS_Worker

- **Report Setup:**
    - **Type:** Advanced Custom Report
    - **Data Source:** Workers for HCM Reporting
    - **Columns:** First Name, Last Name, Social Security Number

6 items

	Order	*Business Object	Field	Column Heading Override	Column Heading Override XML Alias	Format
⊕ ⊖	▼ ▼	✕ Worker ⧉ ☰	✕ First Name ⋯ T ☰		firstName	
⊕ ⊖	▲ ▼	✕ Worker ⧉ ☰	✕ Last Name ⋯ T ☰		lastName	
⊕ ⊖	▲ ▼	✕ Worker ⧉ ☰	✕ Social Security Number ⋯ T ☰		Social_Security_Number	

Group Column Headings 0 items

- **Calculated Fields:**
  - **Xx_AS_CF_FullName:** Concatenates First Name, a space, and Last Name to display the full name.
  - **Xx_AS_CF_Employee_Tenure:** Computes the difference between the Hire Date and Today's Date in years to determine employee tenure.

Create Calculated Field   ✕

Field Name *	Xx_AS_CF_FullName	
Business Object *	✕ Worker ⧉	☰
Function *	✕ Concatenate Text	☰

Cancel   OK

Field Name   * Xx_AS_CF_FullName

Business Object   Worker

Calculation   Additional Info

Concatenate Text

3 items

	Order	*Field
⊕ ⊖	▽ ▼	✕ First Name ⋯
⊕ ⊖	▲ ▼	✕ Single Space ⋯
⊕ ⊖	▲ ▲	✕ Last Name ⋯

OK   Cancel

Business Object   Worker

Calculation   Additional Info

Date Difference

Start Date Field   *   ✕ Today ⋯

End Date Field   *   ✕ Hire Date ⋯

Value Returned   (empty)

* ◉ In Years
  ◯ In Months
  ◯ In Days
  ◯ In Hours

OK   Cancel

Order	*Business Object	Field	Column Heading Override	Column Heading Override XML Alias	Format
▲ ▼	✕ Worker 🔗 ☰	✕ Address as of Date Prompt 1 ⋯ T ☰	Address	Address	
▲ ▼	✕ Worker 🔗 ☰	✕ Xx_AS_CF_FullName ⋯ T ☰	Full Name	Full_Name	
▲ ▲	✕ Worker 🔗 ☰	✕ Xx_AS_CF_Employee_Tenure ⋯ ☰	Employee Tenure	Employee_Tenure	

Group Column Headings 0 items

	*Business Object	Group Column Heading	Group Column Heading XML Alias
⊕			
		No Data	

[OK] (Cancel)

- **Output:**
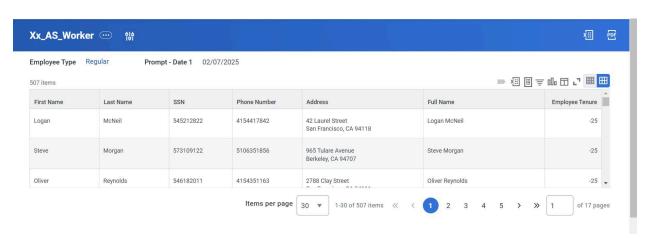 The report displays comprehensive employee data including raw fields and calculated fields (full name and tenure).

Xx_AS_Worker ⋯ ⚙

Employee Type Regular   **Prompt - Date 1**   02/07/2025

507 items

First Name	Last Name	SSN	Phone Number	Address	Full Name	Employee Tenure
Logan	McNeil	545212822	4154417842	42 Laurel Street San Francisco, CA 94118	Logan McNeil	-25
Steve	Morgan	573109122	5106351856	965 Tulare Avenue Berkeley, CA 94707	Steve Morgan	-25
Oliver	Reynolds	546182011	4154351163	2788 Clay Street	Oliver Reynolds	-25

Items per page 30 ▾   1-30 of 507 items   « ‹ **1** 2 3 4 5 › » [1] of 17 pages

Second Report: Xx_AS_Journal

- **Report Setup:**
  - **Type:** Advanced Custom Report
  - **Data Source:** Journal Line (Financial Data)
  - **Columns:** Journal Entry Type, Accounting Date, Account ID, Alternate Supplier Contract, Customer Invoice
- **Calculated Fields:**
  - **Xx_AS_Company_Name:**
    - **Business Object:** Global
    - **Function:** Text Constant
    - **Value:** "Global Modern Services"

- ■ **Purpose:** Provides a constant company name for every record.
  - ○ **Xx_AS_Customer_Invoice:**
    - ■ **Business Object:** Journal Line
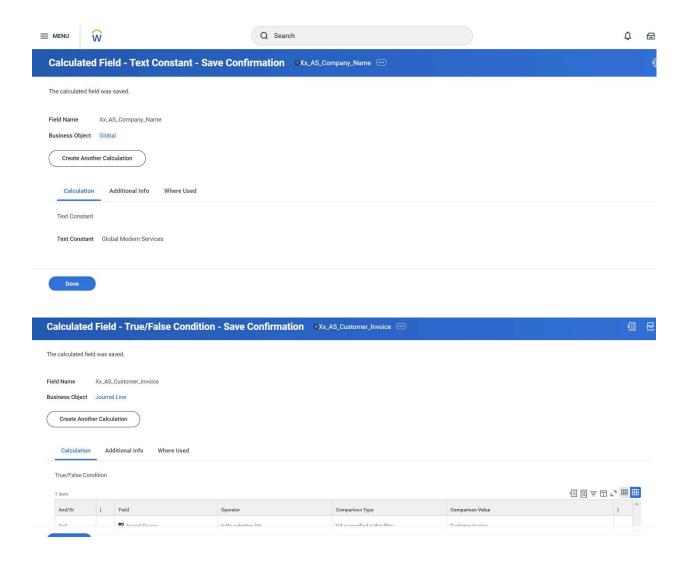   - ■ **Function:** True/False Condition
    - ■ **Condition:** Determines if a journal line is related to a customer invoice.
- ● **Integration Process:**
  - ○ Similar to the first report, this report is also enabled as a web service, allowing external access and integration with other systems.

- ● **Output:**
  The second report displays detailed financial data along with the calculated fields that add context—identifying the company and flagging customer invoice-related entries. This complements the first report by utilizing a different business object and data source, further showcasing Workday's flexibility.

≡ MENU   W   🔍 Search   🔔 🖨

Calculated Field - Text Constant - Save Confirmation T Xx_AS_Company_Name ⋯

The calculated field was saved.

Field Name   Xx_AS_Company_Name

Business Object   Global

(Create Another Calculation)

Calculation   Additional Info   Where Used

Text Constant

Text Constant   Global Modern Services

(Done)

Calculated Field - True/False Condition - Save Confirmation TF Xx_AS_Customer_Invoice ⋯

The calculated field was saved.

Field Name   Xx_AS_Customer_Invoice

Business Object   Journal Line

(Create Another Calculation)

Calculation   Additional Info   Where Used

True/False Condition

1 item   ⊞ ⊟ ⊟ ⊡ ⌄ ⊞ ⊞

And/Or	(	Field	Operator	Comparison Type	Comparison Value	)
And		Journal Source	in the selection list	Value specified in this filter	Customer Invoice	

	Order	*Business Object	Field	Column Heading Override	Column Heading Override XML Alias	Format	Options
⊕ ⊖	▽ ▼	✕ Journal Line ⧉ ≡	✕ Journal Entry Type ⋯ ≡		Journal_Entry_Type		⚠ 1 Alert
⊕ ⊖	▲ ▼	✕ Journal Line ⧉ ≡	✕ Accounting Date ⋯		Accounting_Date		
⊕ ⊖	▲ ▼	✕ Journal Line ⧉ ≡	✕ Account ID ⋯ ≡		Account_ID		
⊕ ⊖	▲ ▼	✕ Journal Line ⧉ ≡	✕ Xx_AS_Company_Name ⋯ ≡		Alternate_Supplier_Contract		
⊕ ⊖	▲ ▲	✕ Journal Line ⧉ ≡	✕ Xx_AS_Customer_Invoice ⋯ ≡		Xx_AS_Customer_Invoice		

Group Column Headings 0 items

	*Business Object	Group Column Heading	Group Column Heading XML Alias
⊕			
	No Data		

OK **Cancel**

Columns | Sort | Filter | Prompts | Output | Share | Advanced

5 items

Business Object	Field	Column Heading Override XML Alias	Format	Options
Journal Line	🔲 Journal Entry Type	Journal_Entry_Type		
Journal Line	📅 Accounting Date	Accounting_Date		
Journal Line	T Account ID	Account_ID		
Journal Line	T Xx_AS_Company_Name	Alternate_Supplier_Contract		
Journal Line	🔲 Xx_AS_Customer_Invoice	Xx_AS_Customer_Invoice		

Run **Test** **Done**

- **Integration Process:**
  - **Enable as Web Service:** The report is published as a web service for external access.
  - **Outbound Integration (Xx_AS_Worker_Outbound):**
    - Data is sent to an AWS S3 bucket.
    - The integration is launched.
  - **Inbound Integration (Xx_AS_Worker_Inbound):**
    - Data is imported from the same AWS S3 bucket using a template model from a web service operation.
    - The integration is launched
- Both integrations ensure data is transferred seamlessly between Workday and the external system.

Xx_AS_Worker_Outbound

Actions

🖨

○ General Settings

○ Get Data

○ Transform

◉ **Deliver**

○ Review and Submit

Deliver

Delivery Method * | Use Existing Delivery Method ▼

Delivery Details   (S3) prismawsdemobucket (US East (Ohio))

Delivery Method Usages   2

External Endpoint * | ✕ (S3) prismawsdemobucket (US East (Ohio))   ☰

File Name * | Xx_AS_Worker_Outbound

Document Retention Policy (in Days) | 1

> Details

Back   Next   Close

Launch / Schedule Integration   ✕

Integration * | ✕ Xx_AS_Worker_Outbound ⋯   ☰

Organization | ☰

Integration System Context | ☰

Run Frequency * | ✕ Run Now   ☰

Cancel   OK

View Background Process Xx_AS_Worker_Outbound ⋯

Process	Xx_AS_Worker_Outbound
Request Name	Xx_AS_Worker_Outbound
Status	Processing
Current Processing Time (hh:mm:ss)	00:00:00
Average Processing Time (hh:mm:ss)	00:00:00

Refresh

Integration Details Process Info   Process History   Output Files (0)   Messages (0)   Child Processes (1)

dit Inbound EIB ⊢

x_AS_Worker_Inbound Actions

🖨

- ● General Settings
- ○ Get Data
- ○ Transform
- ○ Deliver
- ○ Review and Submit

General Settings

Name	*	Xx_AS_Worker_Inbound
ID	*	Xx_AS_Worker_Inbound
Comment		

Back   Next   Close

Edit Inbound EIB

Xx_AS_Worker_Inbound (Actions)

🖨

- ○ General Settings
- ⦿ **Get Data**
- ○ Transform
- ○ Deliver
- ○ Review and Submit

Get Data

Data Source

Retrieval Method ＊ [Use Existing Retrieval Method ▼]

Retrieval Details   (S3) prismawsdemobucket (US East (Ohio))

Retrieval Method Usages   3

Use Existing Retrieval Method ＊ [✕ (S3) prismawsdemobucket (US East (Ohio))   ☰]

File Name ＊ [Xx_AS_Inbound]

> Details

≡ MENU   W   🔍 EDIT EIB   ⊗

Edit Inbound EIB

Xx_AS_Worker_Inbound (Actions)

🖨

- ○ General Settings
- ○ Get Data
- ⦿ **Transform**
- ○ Deliver
- ○ Review and Submit

Transform

Transformation Type   ＊ [Template Model ▼]

Template Model from Web Service Operation ＊ [✕ Import Plan Publishing CSV File ⋯ ☰]

Transformation for Custom Object   (empty)

Custom Transformation   (empty)

Delivered Transformation   (empty)

Edit Inbound EIB |←

Xx_AS_Worker_Inbound (Actions)

🖨

○ General Settings

○ Get Data

○ Transform

◉ **Deliver**

○ Review and Submit

Deliver

Delivery Method   * | Workday Web Service Operation ▼ |

Workday Web Service Operation   Import Plan Publishing CSV File (WS Background Process)

Custom Object   (empty)

(Back)   (**Next**)   (Close)

Edit Inbound EIB |←

Xx_AS_Worker_Inbound (Actions)

🖨

○ General Settings

○ Get Data

○ Transform

○ Deliver

◉ **Review and Submit**

General Settings

Name   Xx_AS_Worker_Inbound

ID   Xx_AS_Worker_Inbound

Comment   (empty)

Get Data

Data Source

Retrieval Method   Use Existing Retrieval Method

(**OK**)   (Back)   (Close)

Process	Xx_AS_Worker_Inbound
Request Name	Xx_AS_Worker_Inbound
Status	Processing
Current Processing Time (hh:mm:ss)	00:00:00
Average Processing Time (hh:mm:ss)	00:00:00

(Refresh)

Integration Details   Process Info   Process History   Output Files (0)   Messages (0)   Child Processes (1)