Workday Prism Training Assignment- 5

Goal:

Understand discovery boards and visualization along with Report writer, EIB Integrations, Security and data sources. Make use of Blending data and transformations, PRISM functions etc. Understanding of the studio.

Problem:

- □ Reports to Vizzes
    - □ Journal Lines for Financial Reporting
    - □ Recruiting Status
    - □ Utilization of workday web services and features and data transformation
    - □ Creating transformation with data change
    - □ Creating discovery board by using reports, table and data sets
- □ Workbooks and Worksheets
- □ Creating document template
- □ Creating presentation
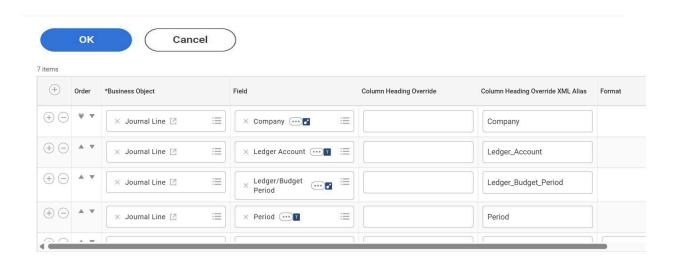- □ Sharing and assigning security details
- □ Inbound and outbound integration

Solution:

Reports to Vizzes
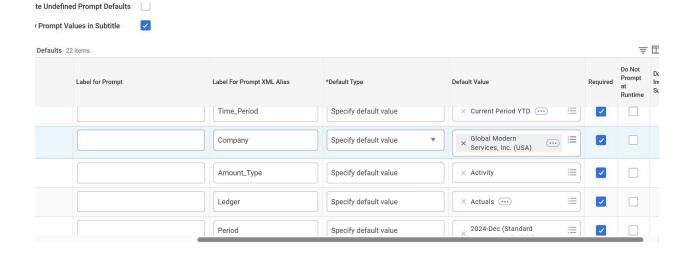
Journal Lines

Create Advanced report

1. Create a xx_as_journal_lines_FR report .
2. Enable for web services and prism.
3. Set default prompts.
4. Save and run to see the data.

Name	*	xx_as_journal_lines_FR

Report Type   Advanced

Data Source   Journal Lines for Financial Reporting

Data Source Filter   Journal Lines for Company and Reporting Time Period

Temporary Report ☑

Optimized for Performance ☑

OK   **Cancel**

7 items

⊕	Order	*Business Object	Field	Column Heading Override	Column Heading Override XML Alias	Format
⊕ ⊖	▼ ▼	✕ Journal Line ↗ ☰	✕ Company ⋯↗ ☰		Company	
⊕ ⊖	▲ ▼	✕ Journal Line ↗ ☰	✕ Ledger Account ⋯T ☰		Ledger_Account	
⊕ ⊖	▲ ▼	✕ Journal Line ↗ ☰	✕ Ledger/Budget Period ⋯↗ ☰		Ledger_Budget_Period	
⊕ ⊖	▲ ▼	✕ Journal Line ↗ ☰	✕ Period ⋯T ☰		Period	

te Undefined Prompt Defaults ☐

Prompt Values in Subtitle ☑

Defaults   22 items

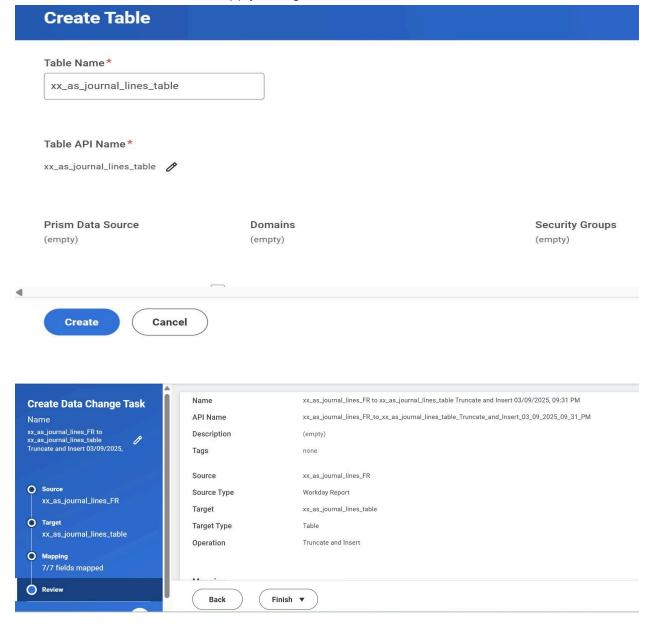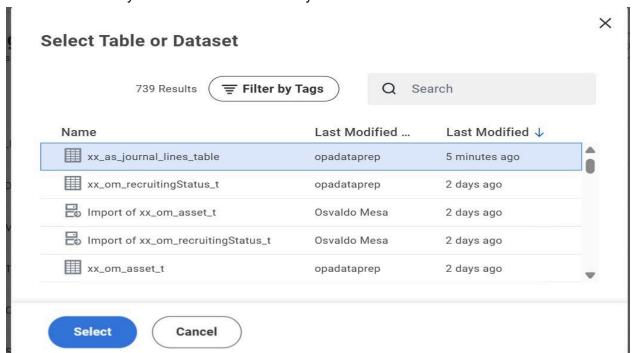|	Label for Prompt	Label For Prompt XML Alias	*Default Type	Default Value	Required	Do Not Prompt at Runtime	Do In Su
		Time_Period	Specify default value	✕ Current Period YTD ⋯ ☰	☑	☐	
		Company	Specify default value ▼	✕ Global Modern Services, Inc. (USA) ⋯ ☰	☑	☐	
		Amount_Type	Specify default value	✕ Activity ☰	☑	☐	
		Ledger	Specify default value	✕ Actuals ⋯ ☰	☑	☐	
		Period	Specify default value	✕ 2024-Dec (Standard ☰	☑	☐	

Truncate the Table and Create Data Change Task

1. Go to the quick action menu button and select Truncate the table, to remove all the data from the table.
2. Again go to the quick actions menu select Create Data Change Task.
3. Select the workday report as the source file.
4. Edit parsing options as needed.
5. Select target table and target operation,
6. Mapping: match the source data to the fields in the target table.
7. Review, save and run to apply changes.

Create a Dataset and Publish the Dataset.

1. Click Create Derived Dataset and select the workday report table you just created.
2. Transform the data and save the dataset.
3. Publish the dataset by selecting publish from the quick actions menu button. The dataset is now ready to be used in the discovery board.

Create Visualizations Using Discovery Board

1. Go to the Discovery board and Select the dataset you want to use in your visualizations.
2. Create Visualizations by selecting the chart type, and dragging the fields to the x axis, and y axis,
   - Viz 1: Use a Bar chart to display Monthly Expense Overview.
   - Viz 2: Use Donut chart to display Expense Distribution by Cost Center.
3. Once all sheets and visualizations are created, you can click Publish, and share the workbook with relevant stakeholders for review.

Security

Create a security group, assign and configure security roles:

1. Create a role based unconstrained security group xx_as_fin_acc_sg.
2. Navigate to the Financial Accounting functional area.
3. View domain security policies.
4. Select Reports: Financial Accounting, and edit permissions.
5. Add the security group and grant permissions to view, modify, get and put.
6. After making the necessary modifications, initiate the Activate Pending Security Policy Changes task.
7. Provide a comment describing the changes, confirm and submit to apply the updates.

Activate Pending Security Policy Changes

All pending security policy changes will become effective. Please review the data below and click Confirm if you want to proceed.

Current Security Evaluation Moment	03/03/2025 11:26:46.357 AM
Proposed Security Evaluation Moment	03/09/2025 04:32:34.378 PM
Comment	as
Confirm	* ☐

Domain Security Policies 1 item

Domain Security Policy	Last Changed	By User
Reports: Financial Accounting	03/09/2025 04:31:23.321 PM	Shams / Anjum Shams

OK   **Cancel**

Reports: Average Daily Balance	⊖ Less (5)		
Reports: Financial Accounting	Adaptive_ISSG	Yes	
Reports: Financial Reports with P...			
Reports: Funding Sources	Planning Administrator Financials	Yes	Ye:
Reports: High-volume Reporting (...			
Reports: Manager Financial Repo...	xx_as_fin_acc_sg	Yes	Ye:
Reports: Organization Accounting...			

Name	* xx_as_fin_acc_sg
Comment	
Context Type	Unconstrained
Inactive	☐
Assignable Role	* ☒ Cost Center Manager (•••)

Domain Security Policy Permissions 2 items

Operation	Domain Security Policy	Domain Security Policies Inheriting Permission	Functional Areas
View and Modify	Reports: Financial Accounting		Financial Accounting
Get and Put	Reports: Financial Accounting		Financial Accounting

OK   **Cancel**

Recruiting Status

Create Advanced report

1. Create a xx_as_recruitment report.
2. Enable for web services, worksheets and prism.
3. Set default prompts.
4. Save and run to see the data.
5. Export the report to workday worksheets, and create a pivot table.
6. Use the workday document template to create a memo inserting the relevant data fields.
7. Create a presentation using workday presentation, and insert the pivot table from the worksheet.

Temporary Report

This is a temporary report definition and will automatically be deleted by the system on or after 03/14/2025.

Report Name	* xx_as_recruitment
Report Type	Advanced
Data Source	* ✕ Recruiting Statuses ⋯ 𝄆
Data Source Filter	* ✕ All Stages ⋯
Data Source Type	Indexed
Primary Business Object	Recruiting Status

Report Tags ☰

> **Additional Info**

OK   **Cancel**

⊕	Order	*Business Object	Field	Column Heading Override	Format	Options
⊕⊖	▼ ▼	✕ Recruiting Status ⧉ ☰	✕ Candidate ⋯ ☰			☰
⊕⊖	▲ ▼	✕ Recruiting Status ⧉ ☰	✕ Job Profile ⋯ ☰			☰
⊕⊖	▲ ▼	✕ Recruiting Status ⧉ ☰	✕ Job Requisition ⋯ ☰			☰
⊕⊖	▲ ▼	✕ Recruiting Status ⧉ ☰	✕ Worker Type ⋯ ☰			☰
⊕⊖	▲ ▼	⋯ Recruiting Status ⧉ ☰	⋯ Primary Work ⋯ ☰			☰

xx_as_recruitment ⋯

1008 items

Candidate	Job Profile	Job Requisition	Worker Type	Primary Work Location	Source	Stage	Manager
Harold Bailey - R-00050 Consultant - UK	Consultant	R-00050 Consultant - UK (Filled)	Employee	📍 London	LinkedIn	Review	Percy Keith
Harold Bailey - R-00049 Consultant - UK	Consultant	R-00049 Consultant - UK (Filled)	Employee	📍 London	LinkedIn	Review	Charlotte Cooper
Rebecca Watson - R-00049 Consultant - UK	Consultant	R-00049 Consultant - UK (Filled)	Employee	📍 London	Corporate Website	Review	Charlotte Cooper

Items per page 30 ▾   1-30 of 1008 items « ‹ **1** 2 3 4 5 › » | 1 | of 34 pages

Workbooks and Worksheets

xx_as_recruitment

File   Edit   View   Format   Insert   Data   Filter   Help   All changes are saved automatically

Roboto ▾ 9 ▾ B I U A▾ ▲▾ ▦▾ ⇥ ≡▾ T▾ $ % 1,000 .0 .00 123▾ ◆▾ ▤▾ Σ ▥ ✚

A1   fx   Candidate

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	**Candidate**	**Job Profile**	**Job Requisition**	**Worker Type**	**Primary Work**	**Source**	**Stage**	**Manager**						
2	Harold Bailey -	Consultant	R-00050	Employee	London	LinkedIn	Review	Percy Keith						
3	Harold Bailey -	Consultant	R-00049	Employee	London	LinkedIn	Review	Charlotte						
4	Rebecca Watson	Consultant	R-00049	Employee	London	Corporate	Review	Charlotte						
5	Chelsea Wood -	Consultant	R-00049	Employee	London	Corporate	Review	Charlotte						
6	Mallory Allen -	Resource	R-00052	Employee	London	Corporate	Review	Dylan Shaw						
7	Mallory Allen -	Resource	R-00051	Employee	London	Corporate	Review	Dylan Shaw						
8	Ian Forbes -	Resource	R-00052	Employee	London	LinkedIn	Review	Dylan Shaw						
9	Ian Forbes -	Resource	R-00051	Employee	London	LinkedIn	Review	Dylan Shaw						
10	Rose McLean -	Project Manager	R-00053 Project	Employee	London	Twitter	Review	Dylan Shaw						
11	William	Project Manager	R-00053 Project	Employee	London	Public Event	Review	Dylan Shaw						
12	Rupert Smith -	Project Manager	R-00053 Project	Employee	London	LinkedIn	Review	Dylan Shaw						

✚   xx_as_recruitment ▾

xx_as_recruitment

File   Edit   View   Format   Insert   Data   Filter   Help   All changes are saved automatically

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E6 | Pivot Table Fields ⊡

	A	B	C	D	E	F
1	*COUNTA of Job Requisition*		*Stage*			
2	*Job Profile*	*Manager*	Declined by Candidate	Employment Agreement	Hire	Interview
3	Associate Consultant	Charlotte Cooper			2	
4		Percy Keith			1	
5	Call Center Operator	Magnus Hansen		1	1	
6	Chief Data Officer	Steve Morgan			1	
7	Consultant	Charlotte Cooper	2		3	
8		Percy Keith			4	
9	Consultant Manager	Dylan Shaw			2	
10	Customer Service Representative	Lara Tobler				
11	Executive Assistant	Dylan Shaw			1	
12	Project Manager	Dylan Shaw	1		1	
13	Regional Sales Manager	Camilla Stewart			1	
14	Resource Manager	Dylan Shaw	3		2	
15	Senior Customer Services Representative	Lara Tobler		1		

Pivot Table Pivot1   🗄 ⚙ ✕

🔍 Search fields

Rows

✕ | Job Profile | ≡ ⋯   ✚ Candidate
✕ | Manager | ≡ ⋯   ✚ Job Profile

Columns   ✚ Job Requisition

✕ | Stage | ≡ ⋯   ✚ Worker Type

Values   ✚ Primary Work Loca...

Update

✚   xx_as_recruitment ▾   Sheet2 ▾   Sheet1 ▾
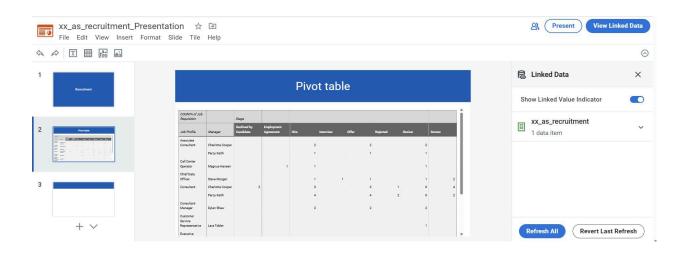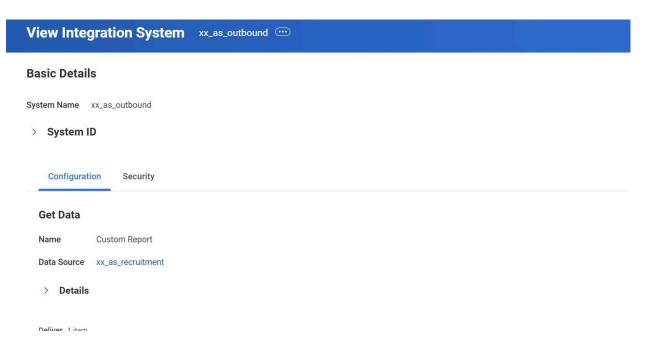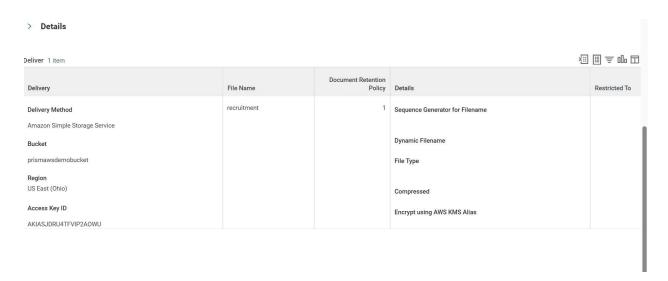
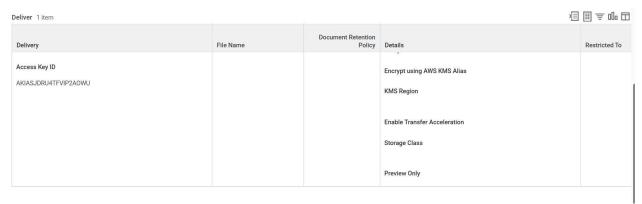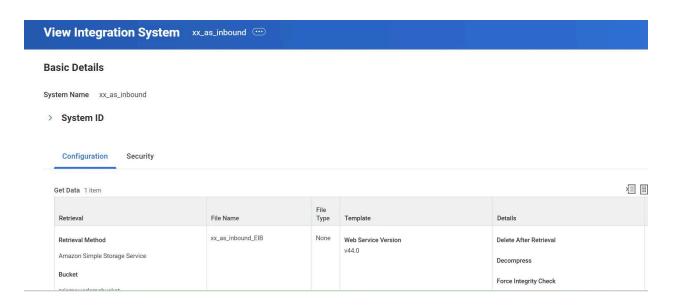# Document Template

Presentations

Integration

- **Integration Process:**
    - **Enable as Web Service:** The report is published as a web service for external access.
    - **Outbound Integration (xx_as_outbound):**
        - Data is sent to an AWS S3 bucket.
        - The integration is launched.
    - **Inbound Integration (xx_as_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.

View Integration System xx_as_outbound ⋯

Basic Details

System Name   xx_as_outbound

❯   **System ID**

Configuration   Security

Get Data

Name   Custom Report

Data Source   xx_as_recruitment

❯   **Details**

Deliver 1 item

> **Details**

Deliver 1 item

Delivery	File Name	Document Retention Policy	Details	Restricted To
Delivery Method Amazon Simple Storage Service **Bucket** prismawsdemobucket **Region** US East (Ohio) **Access Key ID** AKIASJDRU4TFVIP2AOWU	recruitment	1	Sequence Generator for Filename Dynamic Filename File Type Compressed Encrypt using AWS KMS Alias	

Deliver 1 item

Delivery	File Name	Document Retention Policy	Details	Restricted To
Access Key ID AKIASJDRU4TFVIP2AOWU			Encrypt using AWS KMS Alias KMS Region Enable Transfer Acceleration Storage Class Preview Only	

View Integration System xx_as_inbound ⋯

Basic Details

System Name xx_as_inbound

> **System ID**

Configuration   Security

Get Data 1 item

Retrieval	File Name	File Type	Template	Details
Retrieval Method Amazon Simple Storage Service **Bucket** prismawsdemobucket	xx_as_inbound_EIB	None	Web Service Version v44.0	Delete After Retrieval Decompress Force Integrity Check

Retrieval Method	xx_as_inbound_EIB	None	Web Service Version	Delete After Retrieval
Amazon Simple Storage Service			v44.0	
Bucket				Decompress
prismawsdemobucket				
				Force Integrity Check
Region				
US East (Ohio)				Digital Signature Validation Using
Access Key ID				
				Decrypt using AWS KMS Alias
AKIASJDRU4TFVIP2AOWU				

Transform

Transformation Type   Template Model

Transformation   [Import Plan Publishing CSV File](#)

Deliver

Delivery Method   Workday Web Service Operation

Workday Endpoint   Import Plan Publishing CSV File (WS Background Process)