



Workday Finance, configured by a Chartered Accountant.

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■ WORKDAY FINANCE · STEP BY STEP

Discovery Boards

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■ Purpose & Overview

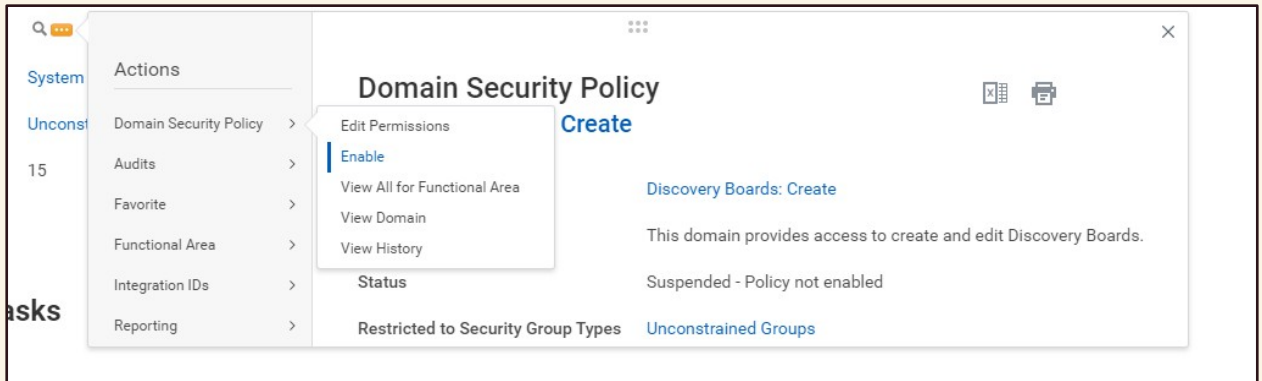
- This guide explains how to create and build Discovery Boards in Workday.
- Discovery Boards provide interactive insights for HCM and Financial reporting.
- Users can create real-time visual analytics using Workday reporting data.

■ Prerequisites

- You have the required Workday security access.
- Intercompany transactions (Supplier Invoices, Customer Invoices, etc.) already exist.
- The accounting period is open.
- Required company and currency details are available.

■ Enable Discovery Boards – Security Setup

- Create or update Workday security domains.
- Enable domain: Discovery Boards – Create.



Domain Security Policy [Create](#)

Discovery Boards: Create

This domain provides access to create and edit Discovery Boards.

Status Suspended - Policy not enabled

Restricted to Security Group Types [Unconstrained Groups](#)

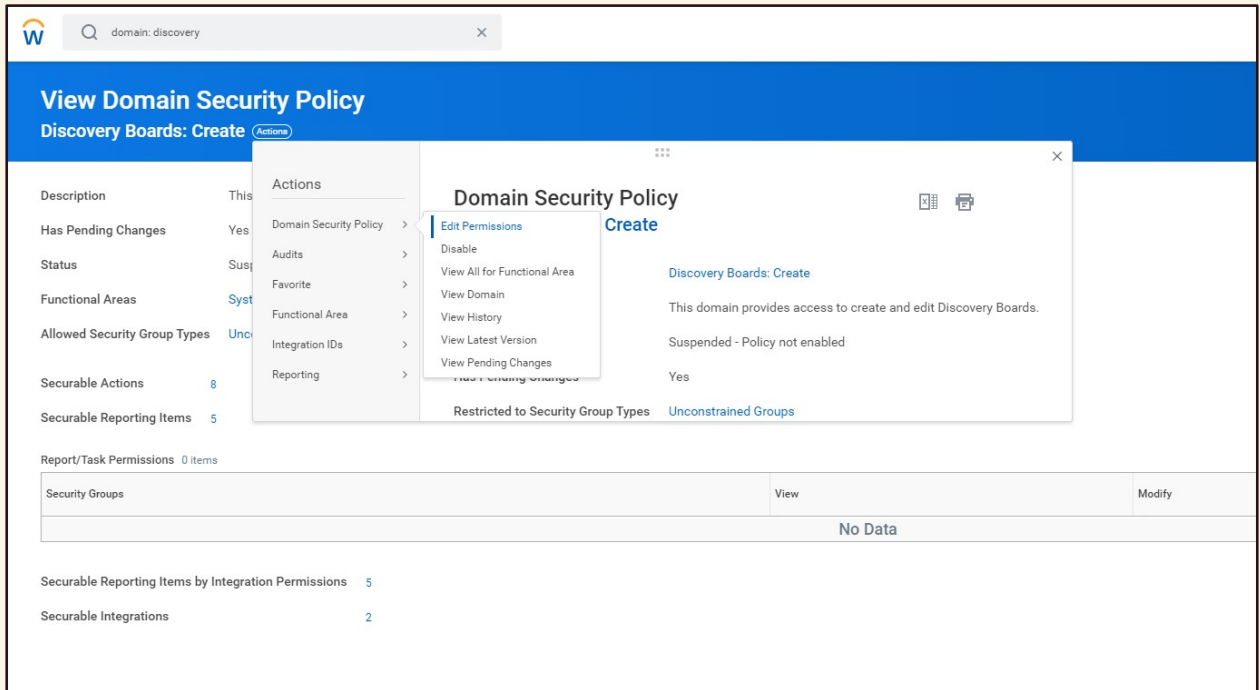
Enable Domain Security Policy

This action will enable the security policy. Click the checkbox to confirm.

Confirm * ☐

■ Enable Discovery Boards – Security Setup

- Ensure access to Drive and Drive Administration domains.



The screenshot displays the 'View Domain Security Policy' page for the 'domain: discovery' domain. The left-hand navigation pane includes sections for 'Description', 'Has Pending Changes', 'Status', 'Functional Areas', 'Allowed Security Group Types', 'Securable Actions', 'Securable Reporting Items', 'Report/Task Permissions', 'Securable Reporting Items by Integration Permissions', and 'Securable Integrations'. The 'Domain Security Policy' modal is open, showing options to 'Edit Permissions', 'Disable', 'View All for Functional Area', 'View Domain', 'View History', 'View Latest Version', 'View Pending Changes', and 'Create'. The modal also displays the 'Discovery Boards: Create' link and a description: 'This domain provides access to create and edit Discovery Boards.' Below the modal, the 'Report/Task Permissions' section shows a table with columns for 'Security Groups', 'View', and 'Modify', and a 'No Data' message. The 'Securable Reporting Items by Integration Permissions' section shows 5 items, and the 'Securable Integrations' section shows 2 items.

■ Enable Discovery Boards – Security Setup

➤ Activate pending security changes.

Edit Permissions

Discovery Boards: Create Actions

Description

This domain provides access to create and edit Discovery Boards.

Has Pending Changes

☒

Status

Suspended - No permissions granted

Functional Areas

System

Allowed Security Group Types

Unconstrained Groups

Notes

Securable Actions

8

Securable Reporting Items

5

Errors and Alerts Found

Report/Task Permissions 1 item

	*Security Groups	View	Modify
+	X HR Administrator X Setup Administrator	☒	☒

Securable Reporting Items by Integration Permissions 5

Securable Integrations 2

Integration Permissions 0 items

OK

Cancel

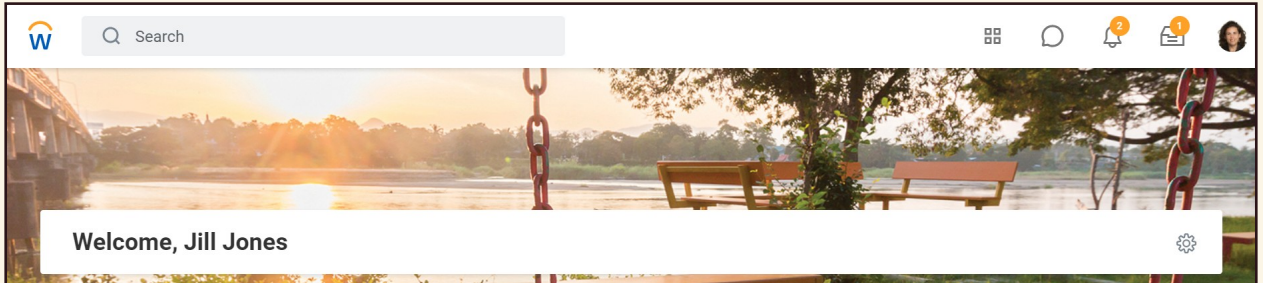
*Security Groups

Get

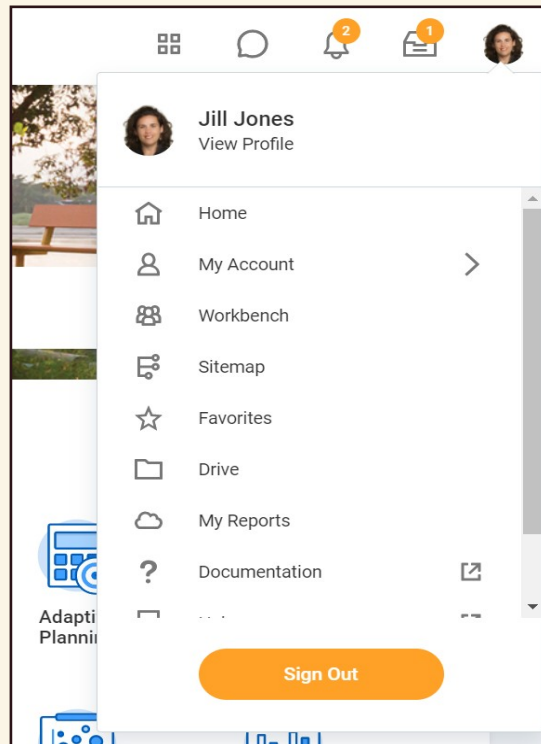
Put

■ Discovery Board Creation – Navigation

- Navigate to Drive using the profile picture icon.

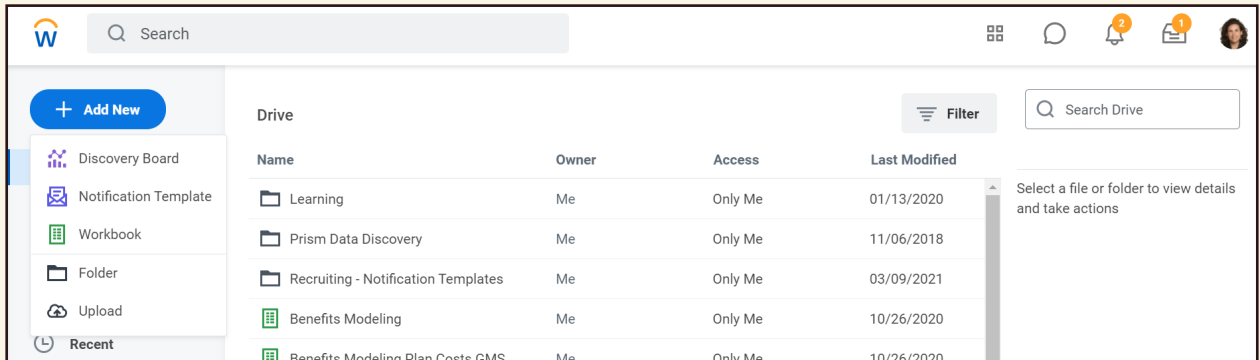


- Select Drive to continue.



■ Discovery Board Creation – Navigation

➤ Click + Add New and select Discovery Board.

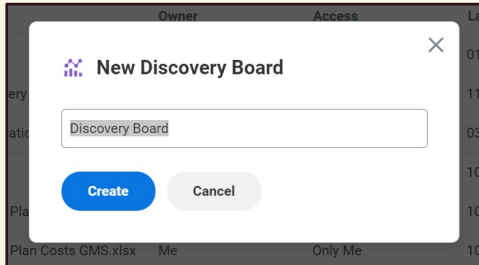
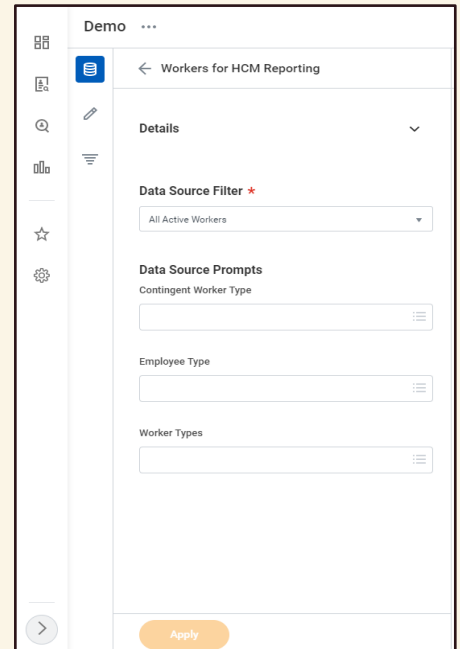


The screenshot shows the Workday Finance interface. On the left, a sidebar contains a '+ Add New' button. A dropdown menu is open, showing options: 'Discovery Board' (selected), 'Notification Template', 'Workbook', 'Folder', 'Upload', and 'Recent'. The main area displays a 'Drive' view with a table of files and folders. The table has columns for Name, Owner, Access, and Last Modified. The files listed are 'Learning', 'Prism Data Discovery', 'Recruiting - Notification Templates', 'Benefits Modeling', and 'Benefits Modeling Plan Costs GMS'. A search bar and a 'Filter' button are also visible in the top right of the main area.

Name	Owner	Access	Last Modified
Learning	Me	Only Me	01/13/2020
Prism Data Discovery	Me	Only Me	11/06/2018
Recruiting - Notification Templates	Me	Only Me	03/09/2021
Benefits Modeling	Me	Only Me	10/26/2020
Benefits Modeling Plan Costs GMS	Me	Only Me	10/26/2020

■ Discovery Board Creation – Initial Setup

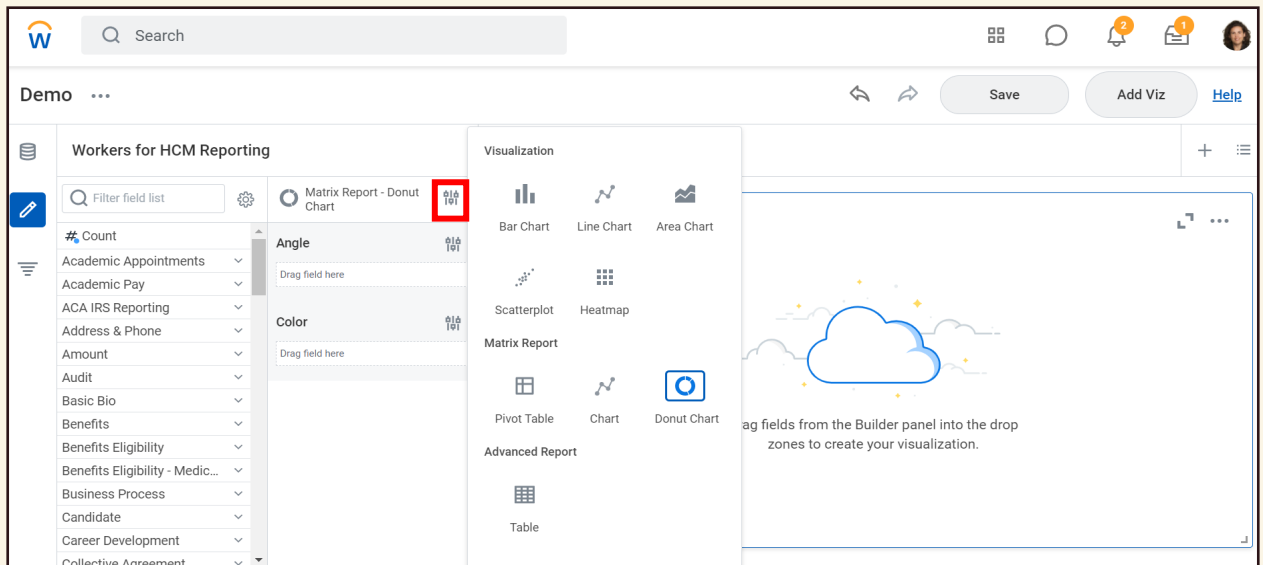
- Enter a name for the Discovery Board.

- In this example we are creating a HCM Discovery Board.
 - So, the Data Source used will be **Workers for HCM Reporting**
 - Select **Apply** to continue

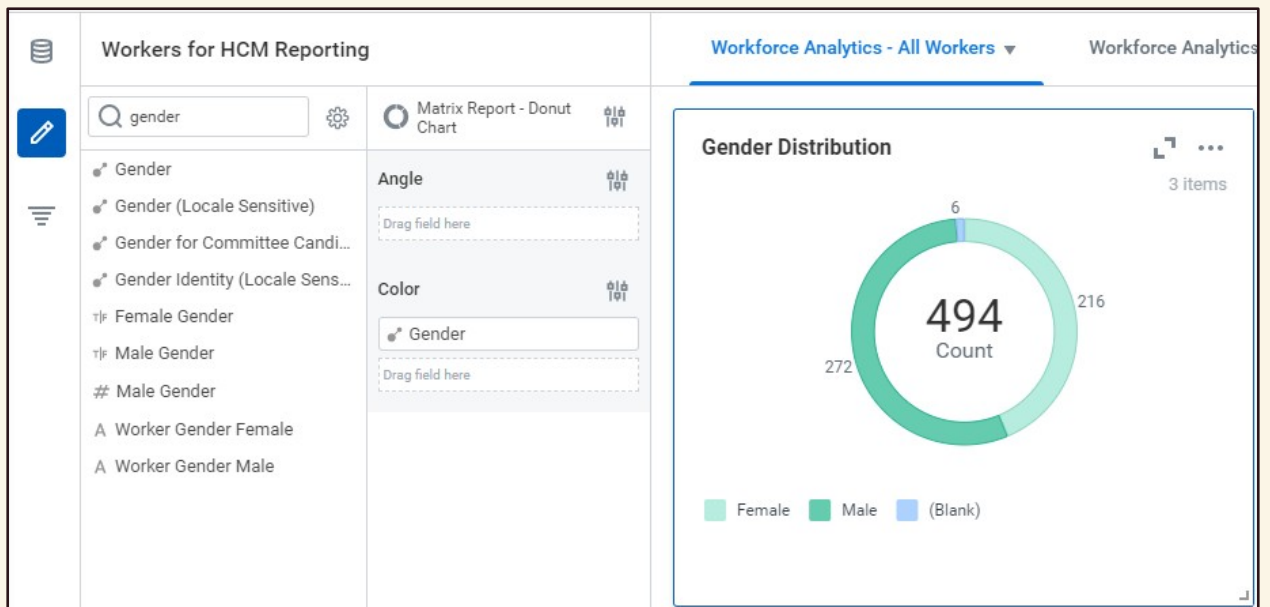
■ Discovery Board Build – Reporting & Visuals

- The reporting interface opens after creation.
- Use the dropdown menu to select visualization types.
- Fields available for reporting appear on the left panel.



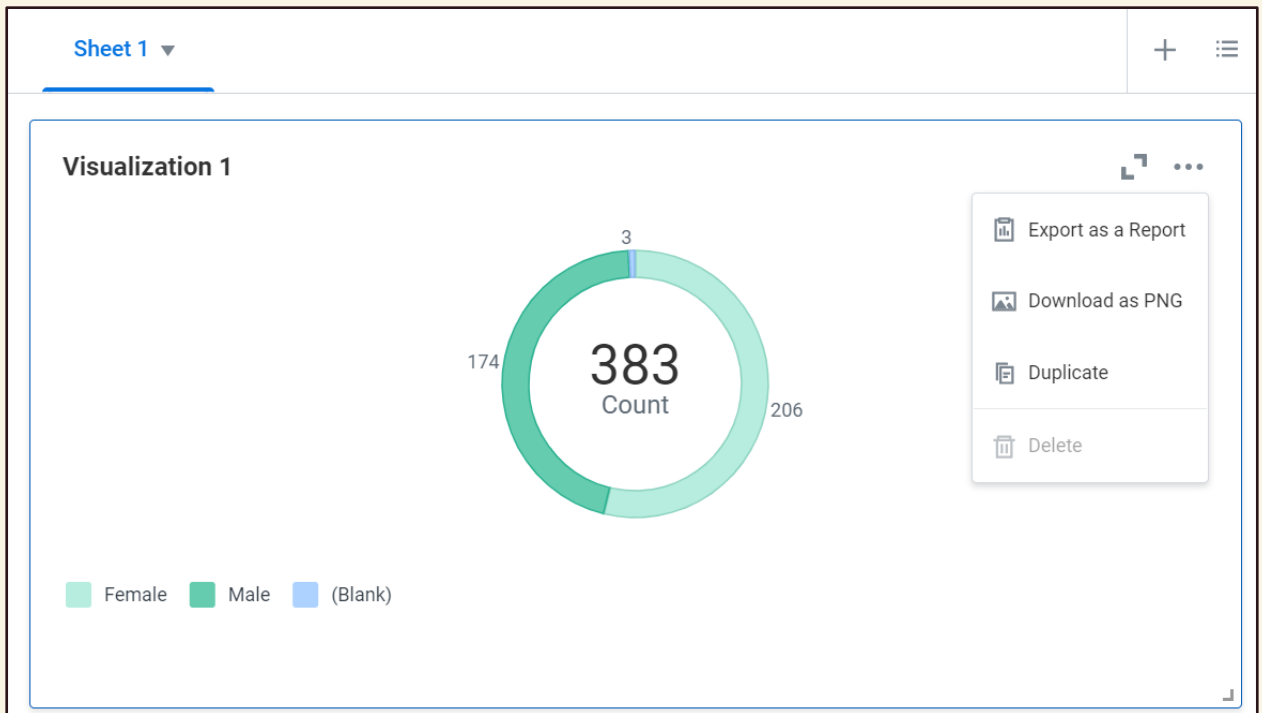
■ Example Visualization – Donut Chart (Gender)

- Select Donut Chart from visualization options.
- Search for Gender field.
- Drag Gender into the Color section.
- Chart updates automatically with real-time data.



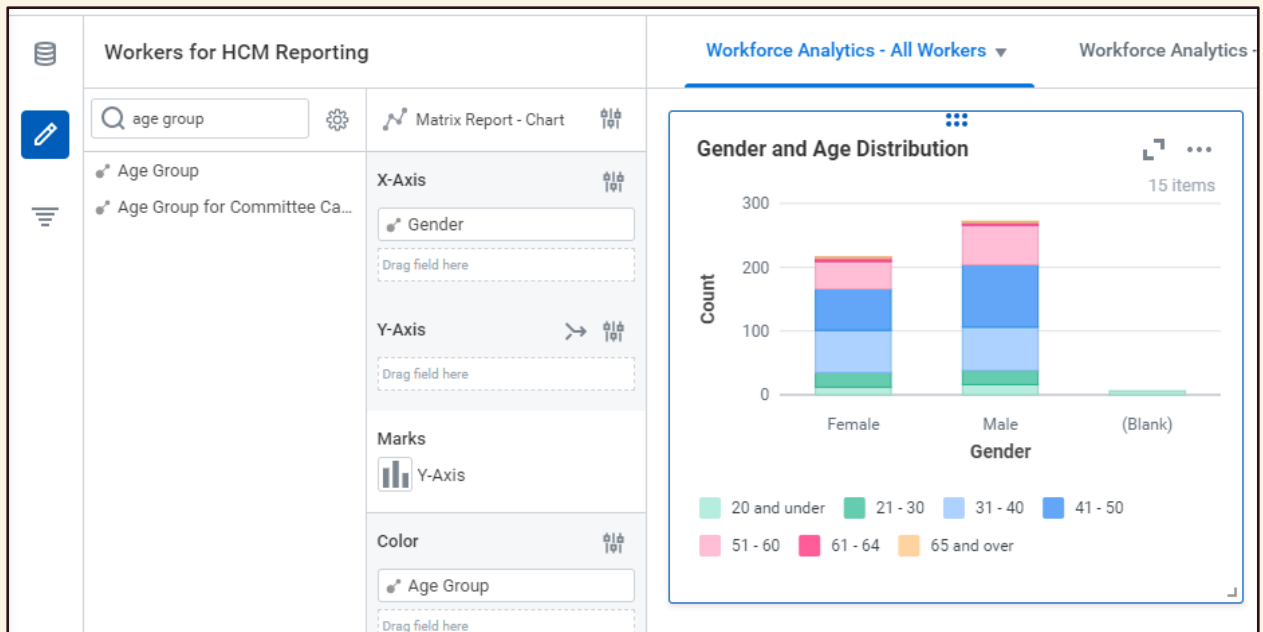
■ Duplicate and Modify Visuals

- Select the Related Actions (three dots) on a visual.
- Choose Duplicate.



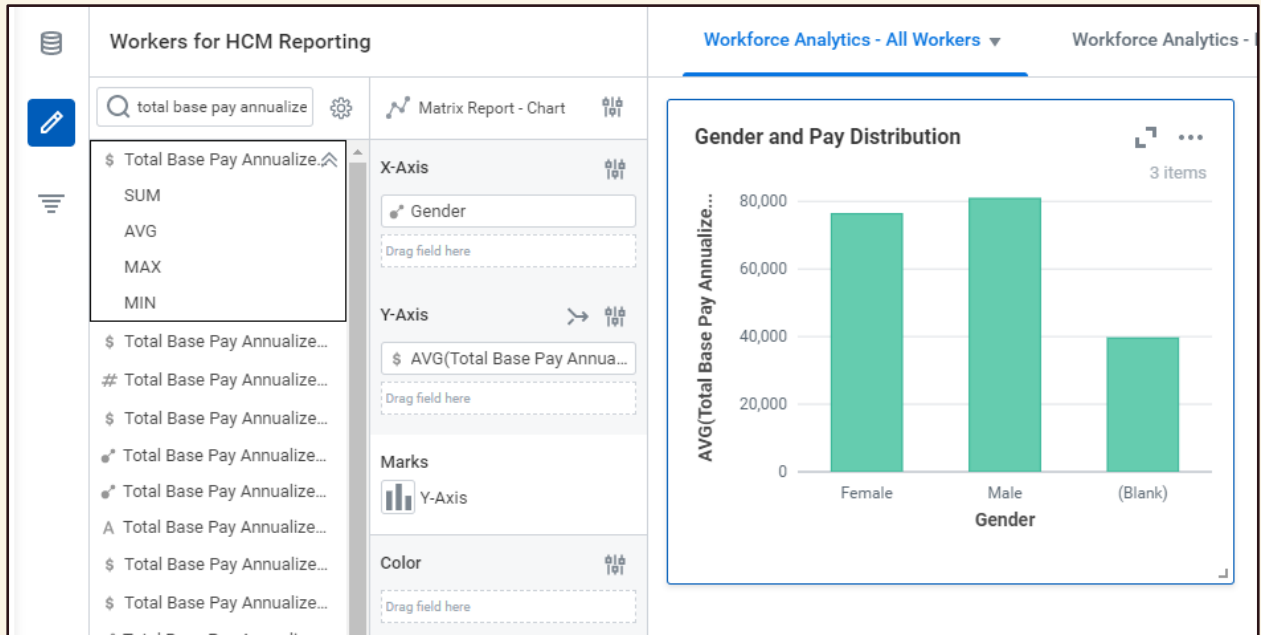
■ Duplicate and Modify Visuals

- Change chart type, such as Bar chart.
- Add additional fields for deeper insights.
- Chart – Gender and Age Group



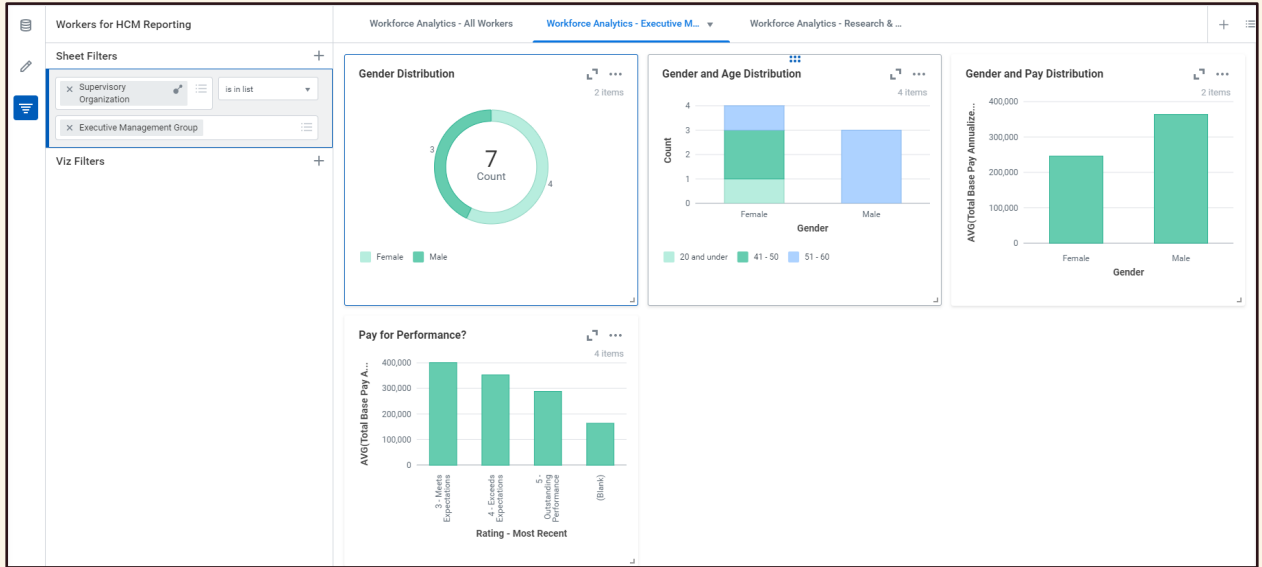
■ Additional Reporting Examples

➤ Total Base pay (AVG)/ Gender



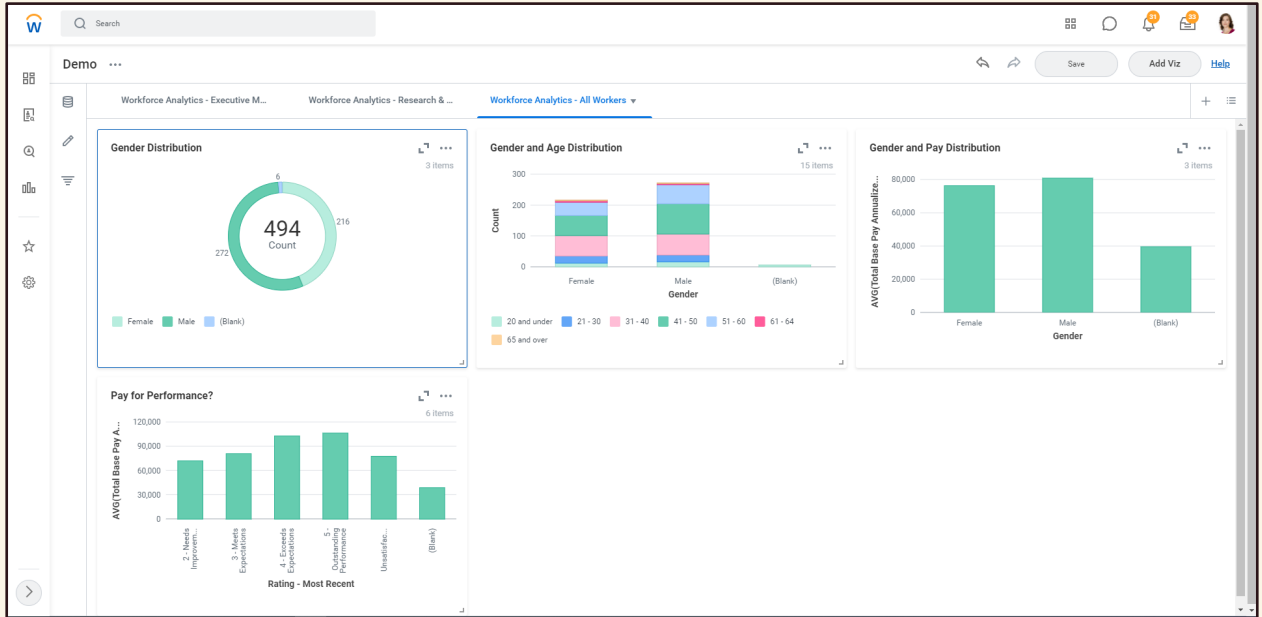
■ Additional Reporting Examples

➤ Sheet filters/ Viz Filters



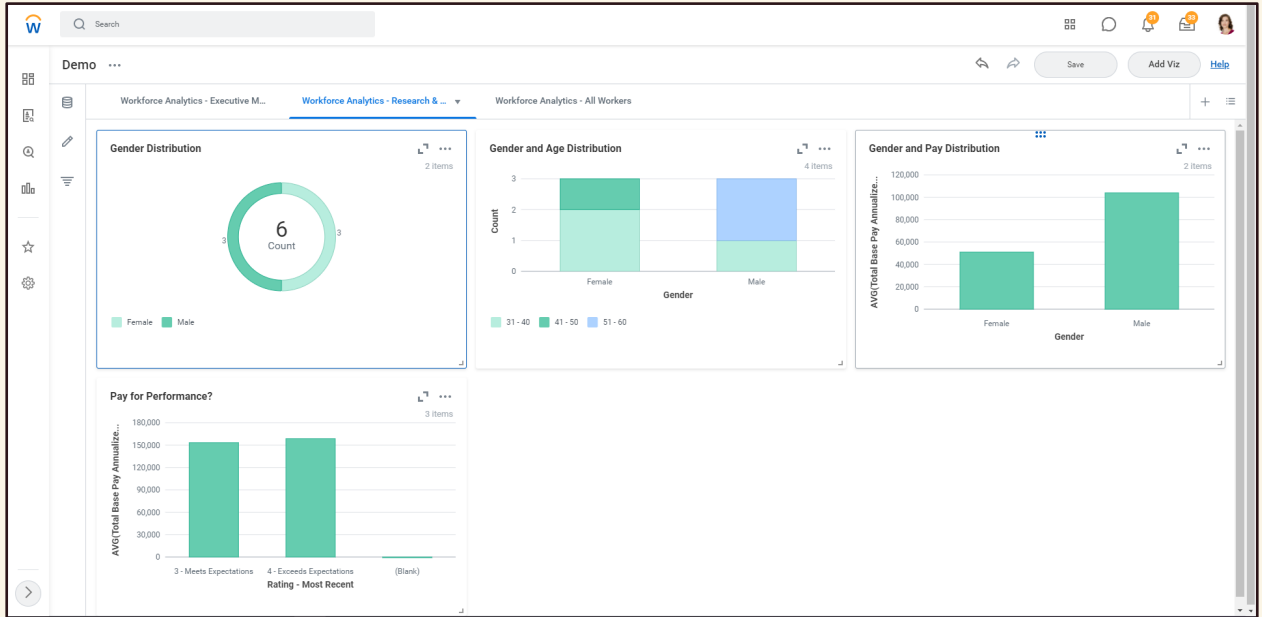
■ Additional Reporting Examples

➤ All Workers



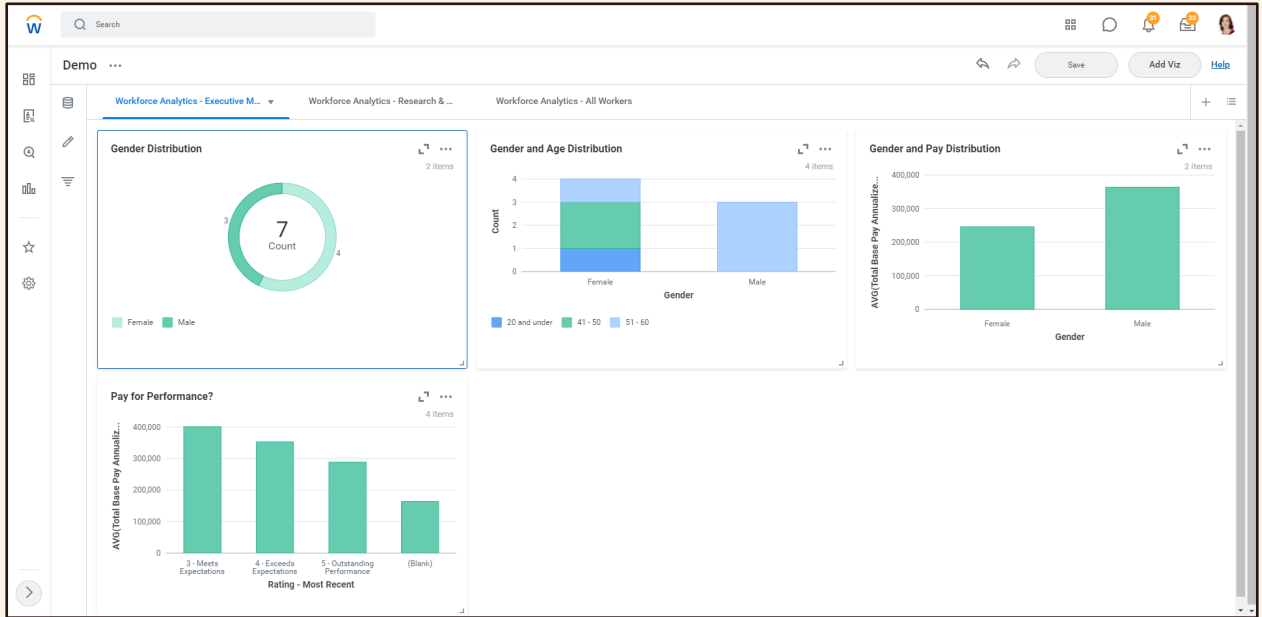
■ Additional Reporting Examples

➤ Research & Development



■ Additional Reporting Examples

➤ Executive Management Group



■ Security Roles

- Access is controlled by Workday security domains.
- Users must have Drive and Discovery Board creation access.
- Insufficient access may prevent board creation or editing.

■ Common Errors & Resolutions

Error	Cause	Resolution
Unable to create a Discovery Board	Discovery Boards: Create domain not enabled	Enable the Discovery Boards: Create domain and activate pending security changes
Drive option not visible	Drive access not assigned	Assign access to the Drive domain
“Add New” option not available	Insufficient Drive permissions	Verify Drive security access is correctly assigned
Discovery Board displays no data	Incorrect data source selected	Select the correct Data Source (e.g., Workers for HCM reporting)
Required fields not available	Reporting field security missing	Update security to grant access to required reporting fields
Error	Cause	Resolution
Unable to create a Discovery Board	Discovery Boards: Create domain not enabled	Enable the Discovery Boards: Create domain and activate pending security changes

■ Best Practices

- Use clear and descriptive Discovery Board names.
- Limit visuals to relevant data for readability.
- Apply filters to improve performance and clarity.
- Reuse visuals by duplicating instead of recreating.



Thank You

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Workday Finance, configured by a Chartered Accountant.

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