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workiva

Configuring the ESG Base Solution

ESG Base Solution

The [Connected ESG](#) solution helps clients automate data collection for quicker, more nimble reporting.

Example Future State

1. Data Collection



2. Frameworks /
Standards / Surveys



3. Factbook



Linking



4. Reporting Outputs

Key Components

- **Data Collection of Customer Data and their templates**
- **Central location in Wdata Tables of Collected Data**
- **Alignment to key frameworks that Customer leverages in their reporting process**

[More Background ESG Framework](#)

Client Current State

Unstructured data sources

- Email
- Excel
- Sharepoint

Structured data sources

- What structured data sources will be used? (e.g. Workday, ADP)

Data providers

- Number of Data Providers
- Consolidated or granular data?

Standard / Frameworks / Surveys

- GRI-SASB-TCFD-SDG-CDP
- Others Provided by Client

Reports

- What reports will be part of implementation? (e.g. ESG report, presentations, surveys)

High Level Onboarding Plan

Phase 1: Align

Establish consistency in expectations according to the statement of work, timelines and objectives.

Phase 2: Discover

Thoroughly understand the current process, requirements, controls and data systems involved.

Phase 3: Design

Develop, recommend, and establish a scalable process that meets the customers needs and is aligned with Workiva best practices.

Phase 4: Build

Replicate and test the designed solution in accordance with the Statement of Work.

Phase 5: Enable

Provide documentation, and training allowing the client ESG team to successfully maintain and iterate off of the delivered solution.

Go-Live

Project hand-off and onboarding services completion.

Project Deliverables

Platform Deliverables

1. Data Collection

- Data collection sheets
- Data collection process

2. Frameworks / Standards / Surveys

- Framework/survey indicators
- Framework/survey mapping

3. Factbook

- Framework indices
- Key data points for reporting

4. Reporting Outputs

- ESG Report

Training & Documentation

- Core ESG team training
- Data provider training
- Data model documentation

Project Management

- Status updates and meetings

Client Current State

Unstructured data sources

- Email
- Excel
- Manual update

Structured data sources

- Power BI
- Enablon

Data providers

- Business unit level
- Consolidated collection

Frameworks / Surveys

- GRI
- CDP Climate / CDP Water
- UN SDG
- DJSI/DJSE
- Ecovadis
- Video Eiris

Reports

- URD Document
- CDP Climate / CDP Water
- DJSI Questionnaire
- GRI Index

High Level Onboarding Plan

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3. Factbook

- Framework indices
- Key data points for reporting

4. Reporting Outputs

- CDP Climate / CDP Water
- GRI Index
- URD Chapter 4
- Annual/Quarterly KPI Dashboard

Training & Documentation

- Core ESG team training
- Data provider training
- Data model documentation

Solution Adoption

- Sign-off on the solution adoption by Team

Project Management

- Partner resourcing
- Status updates and meetings

General Implementation Timeline



ESG Data Collection
Amending and duplicating templates to capture qualitative & quantitative data



ESG Framework Management
Mapping and Modeling of core frameworks and questionnaires to meet clients reporting needs



ESG Factbook
Template creation to meet client reporting needs



ESG Report Build
Import most recent report content into Workiva, link to Performance Data, Discovery with InDesign Team and allow for SEC team data to be linked





Alignment Phase

Deliverable: Account Setup & Internal Alignment

Deliverable Description:

Provisioning of the customer's account, and sync with the pre-sales team involved with the project. Review of SOW and goals and deliverables outlined in Statement of Work.

Recommendations:

- Set up the workspace with the client's main point of contact as a workspace owner
- Other users can be added after the kickoff meeting.
- Alignment discussions should capture
 - **Frameworks used**
 - **Client pain points**
 - **Any exclusions or callouts not captured by the SOW**

Customer Delivery of Documents

Deliverable Description:

Receipt of content outlined in **Document Request Checklist** - A detailed document request checklist is on the next slide

Recommendations:

- ESG Report & Sustainability Presentations / Disclosures
- Data collection templates and source documentation
- ESG Framework mappings and questionnaires that customer aligns to and leverages
- Cross-Framework and Standard(s) Customer aligns with as per their industry

Document Request Checklist

Data Collection & Factbook	Frameworks / Standards / Surveys	Reporting Outputs	People
<p>Existing data collection templates used to collect quantitative data, qualitative data, or both. <input checked="" type="checkbox"/></p>	<p>Document and spreadsheets for each scoped framework, with a full list of each framework's material items (filled out with the prior year's responses, if available) <input checked="" type="checkbox"/></p>	<p>Prior year's version of all output reports in scope of the project <input checked="" type="checkbox"/></p>	<p>List of key team members on this project with an assigned lead for the following areas: Reports Frameworks Data Collection <input checked="" type="checkbox"/></p>
<p>Central factbook in which all collected ESG data is consolidated/stored (if available) <input checked="" type="checkbox"/></p>	<p>Document and spreadsheet(s) for each scoped questionnaire/survey with full listing of material items for each framework (filled out with prior year's responses if available) <input checked="" type="checkbox"/></p>	<p>Style guide associated with each output report (i.e. brand guidelines, style sheet) <input checked="" type="checkbox"/></p>	<p>Prepare overview of periods of downtime, unavailable key team members and holidays <input checked="" type="checkbox"/></p>
<p>Guidance on how data collection sheets relate to specific framework indicators (if available) <input checked="" type="checkbox"/></p>	<p>Framework-to-framework mapping (if available) - Especially relevant if customer is aligning to multiple frameworks. <input checked="" type="checkbox"/></p>	<p>Confirm the frameworks that are aligned and published in a final report. <input checked="" type="checkbox"/></p>	<p>Who are all the people tied in ESG Process, plan of the metrics planning to collect, inclusive of 3rd party data providers. <input checked="" type="checkbox"/></p>
<p>Note(s)</p> <ul style="list-style-type: none"> If some items are combined into a single file, please provide implementation team with sufficient information to locate each item. 	<p>Note(s)</p> <ul style="list-style-type: none"> If some of these items are combined in a single file, please provide implementation team with sufficient information to locate each individual item. 	<p>Note(s)</p> <ul style="list-style-type: none"> If no prior year example exists, please provide draft/template/skeleton structure of report Please provide in editable format (.docx) 	

Sample Document Request - List of ESG Metrics : GRI & SASB

List of ESG/CSR Metrics for Avikro									
Section	vant GRI/SASB Topic A	GRI Disclosure #	SASB Disclosure #	Specific Disclosures	FY19	FY20	FY21	Accountability	CSR, QDR, BOD, 10-K/Proxy, EEO-1 Currently Disclosing/Tracking
Social	Employment	GRI 401		a. Total number and rate of voluntary employee turnover during the reporting period	101; 6%	109; 7%	85; 6%	Joe Dirt	CSR website, QDR, BOD, 10-K
				a. Percentage (%) of staff who say Cirrus is a great place to work?	94%*	92%*	92%**	Bobby Boucher	Disclose but not by gender on CSR website, QRD, BOD (confirm)
Social	Employee Health and Safety	GRI 403	SASB: TC-SC-320a.1	Qualitative description included in text				Sonny Koufax	Limited on CSR website (H&S/Benefits) QRD, BOD (confirm w/ Jo-Dee/Ulf)
			SASB: TC-SC-320a.2	US Dollars (\$)				Sonny Koufax	NA
Social	Training & Education	GRI 404		a. Total hours of training for all employees	15,644	16,335	11,800	Tony Perkis	QDR, BOD
				a. Percentage of total employees by gender and by employee category who received a regular performance and career development review during the reporting period - 100% of employees are eligible	Completion: 94% Overall 94% Male 95% Female	Completion: 91% Overall 91% Male 91% Female	Completion: 93% Overall; 93% Male; 94% Female	Tony Perkis	QDR, Executive Updates, BOD (not by gender)
Social	Diversity & Equal Opportunity	GRI 405		"b. Percentage (%) of employees per employee category in each of the following diversity categories: i. Gender;	1,551	1,443	1,481	Bobby Boucher	CSR website (i., iv), QDR (i), BOD (ii., iii) (confirm)
				Female	260	252	257	Bobby Boucher	



Alignment Phase - Deliverable Checklist

Deliverable

Setup & Alignment

Project Kickoff

Post Kickoff Admin

Deliverable Components

1. Provisioning of customer account / Workspace
2. Confirmation of client goals and objectives with the scoping team / presales team

1. Review of project timeline
2. Confirmation of project target date
3. Initial data request
4. Walkthrough of SOW
5. Confirmation of scope with client
6. Determination of data dependencies

1. Scheduling of status cadence
2. Scheduling of discovery session(s) with client teams

Stage 2



Discovery Phase

Deliverable: Project Kickoff & High Level Discovery

Deliverable Description:

Project launch meeting with the customer to align on scope, timelines & multiple discovery sessions.

Recommendations:

- Target the go-live date for when the client will need to run their new process. Push for realistic deadlines — when will the client's process actually need the build?
- Confirm the pain points and nuances from the scoping team sync, request source data and existing reports.
- Determine whether technical / integration resources need to be engaged from the client.
- Identify early provisioning requirements of Data Providers and Approvers for Data Collections

ESG Project Workstreams & Platform Deliverables

1. Data Collection

2. Frameworks / Standards / Surveys

3. Factbook

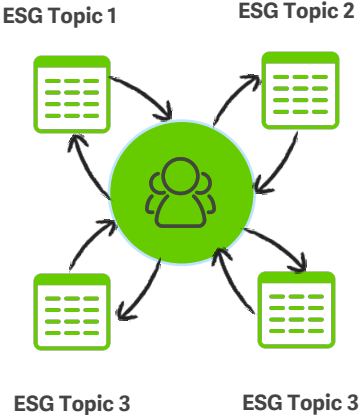
4. Reporting Outputs

1.1 Unstructured Data

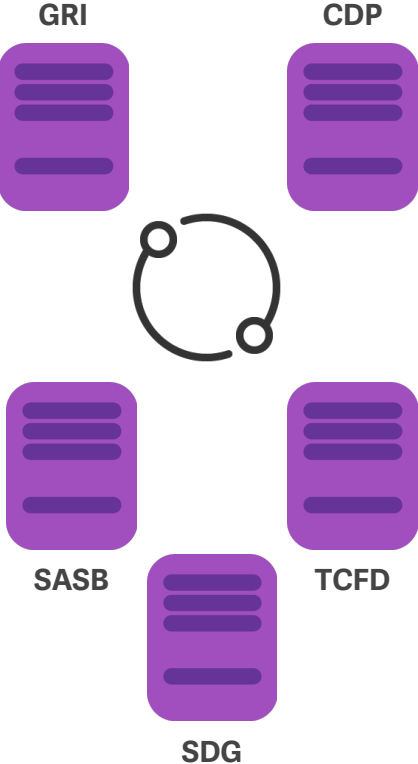
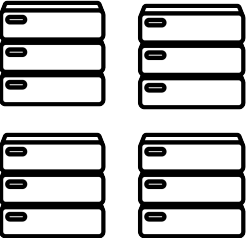
2.1 Framework Content & Data Mapping

3.1 Central Factbook

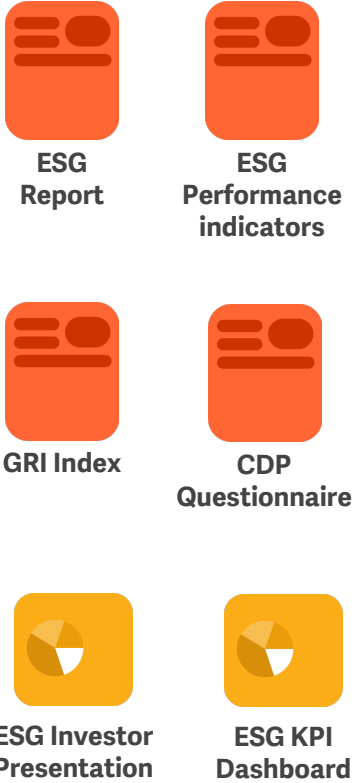
4.1 Reports



1.2 Source System Connections *



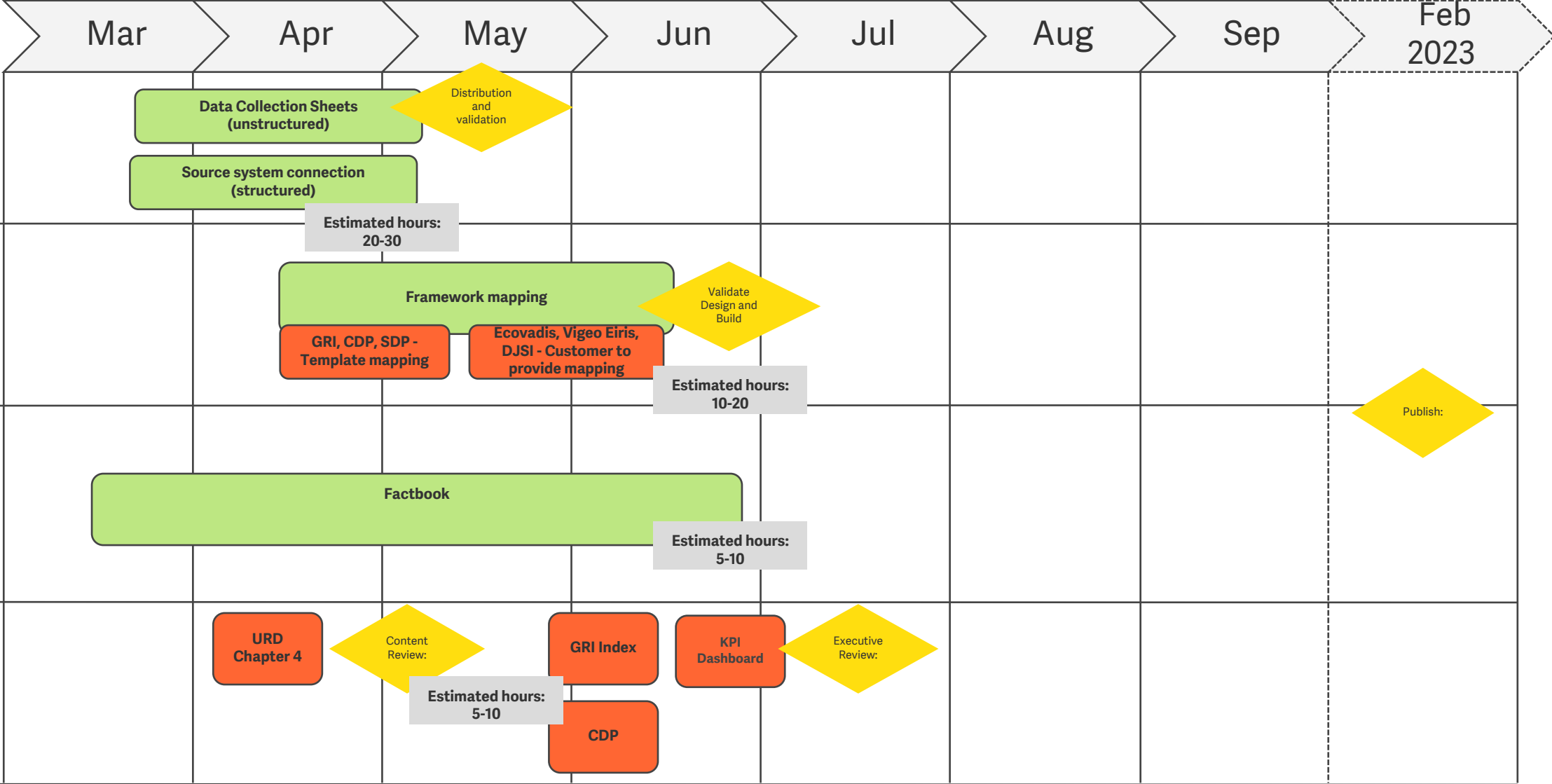
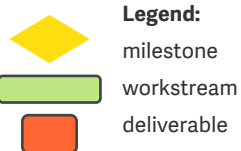
Performance tables & Indices



Names of reports, frameworks, questionnaires and standards above are examples and not representative of the scope of the project.

** Not a requirement for Phases 1 - 4 & Delivery*

High Level Project Planning¹



¹The above is the proposed plan. Activities to be discussed during the Kick-off and timelines adjusted accordingly.

Demo: High Level End-to-End Data Flow

Key Build Activities and Responsibilities

1. Data Collection

2. Frameworks / Standards / Surveys

3. Factbook

4. Reporting Outputs

Partner

- Data collection discovery
- Import data collection templates and tailor to client specification
- Assign data owners and reviewers
- Set up permission structure
- Provide data collection training

- Framework discovery
- Set up in scope frameworks
- Set up metrics / indicators
- Assign permissions
- Set up disclosure level mapping to data collection sheets
- Provide framework management training

- Set up factbook with relevant data points for reporting outputs
 - Frameworks Indices
 - Survey structures
 - Performance data tables
- Provide factbook training

- Set up in scope reporting outputs
- Configure report layout and import style guide
- Assign preparers and reviewers
- Establish data linkages from factbook to reports
- Provide report training
- Submit Doc set-up if needed

Estimated hours:
20-30

Estimated hours:
10-20

Client

Estimated hours:
5-10

Estimated hours:
5-10

- Provide relevant data points, mapping, existing collection sheets, data reports from systems
- Provide roles/ responsibilities
- Provide conversion calculations
- Validate design and build
- Assign permissions to end-users

- Provide summary of ESG frameworks, relevant data points
- Provide framework mapping guidance
- Provide roles/ responsibilities
- Validate design and build
- Assign permissions to end-users

- Provide relevant data tables for presentation in reports
- Provide existing framework / survey presentations
- Validate design and build
- Assign permissions to end-users

- Provide existing reports in editable format (.docx)
- Provide brand guidelines in form of style sheet/guide
- Validate design and build

Discovery Session - ESG Report Outputs

Customer Report lead:

Provide the relevant source documentation and files for output reports, such as the prior year's versions of the report in an editable format (i.e. DocX), brand guidelines, and style guide.

Recommendations:

- Discuss and agree on output report setup approach | Customer Report lead
- Discuss and agree on Design needs, InDesign process - Call with Design Agency
- Update planning in draft project plan to reflect agreed on approach
- Discuss other outputs inclusive of ESG Presentation / KPIs / Investor Decks


ESG Content Sample


ESG Content that has its final design outside Workiva


i.e. export to ICML


Recognizing that the pandemic placed unanticipated demands on our employees, we also launched initiatives to help people feel connected and continued to support our local communities in a time of need.


INITIATIVES TO SUPPORT OUR EMPLOYEES


 Mental health counseling services and resources

 Virtual fitness and meditation classes to keep employees physically active, including a company-wide fitness challenge

 Tutoring discount benefits for parents challenged with virtual school environments

 Contests to bring employees together, such as virtual art shows, baking challenges and photo competitions (many of the photos used in this report were taken by our employees)

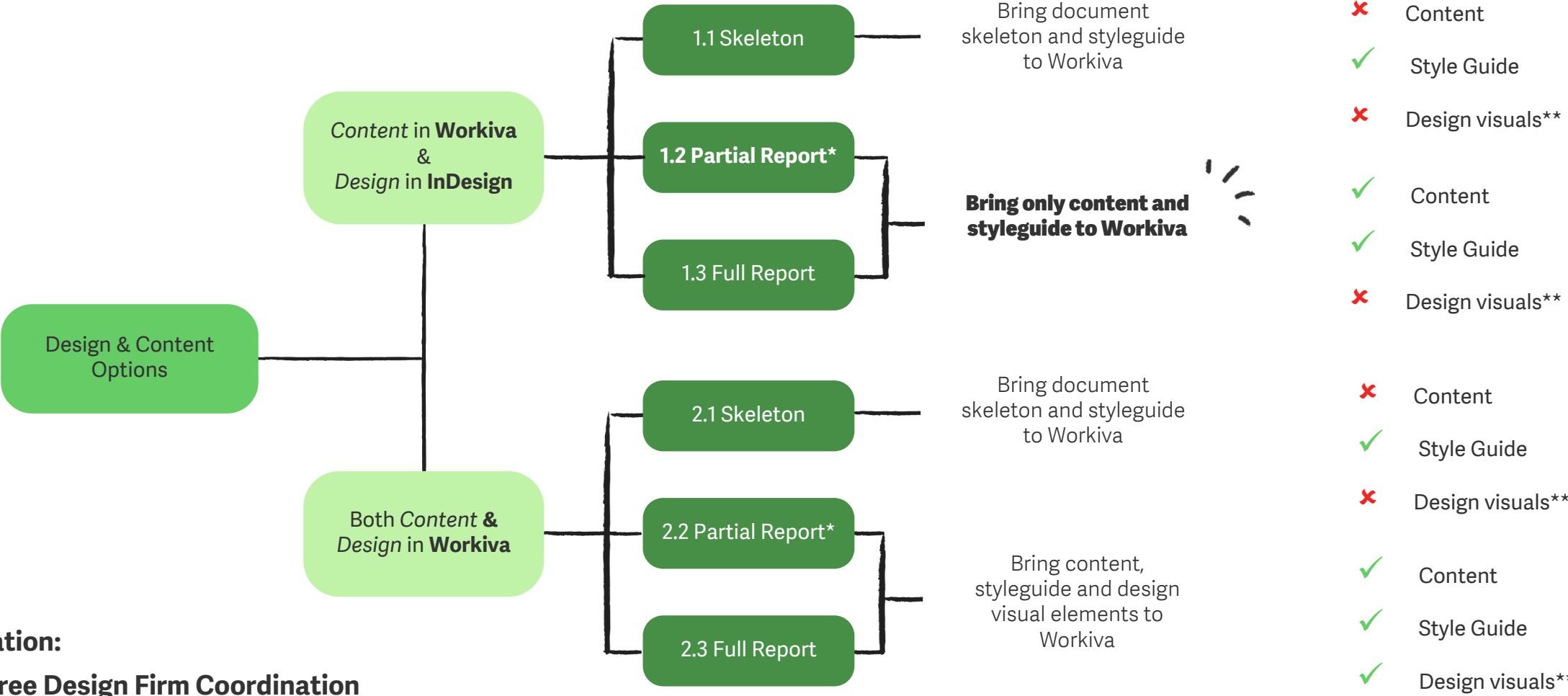
 Online book clubs, guitar lessons and music concerts

 Employee and family care packages



Skeletal
or
Partial Report Set Up

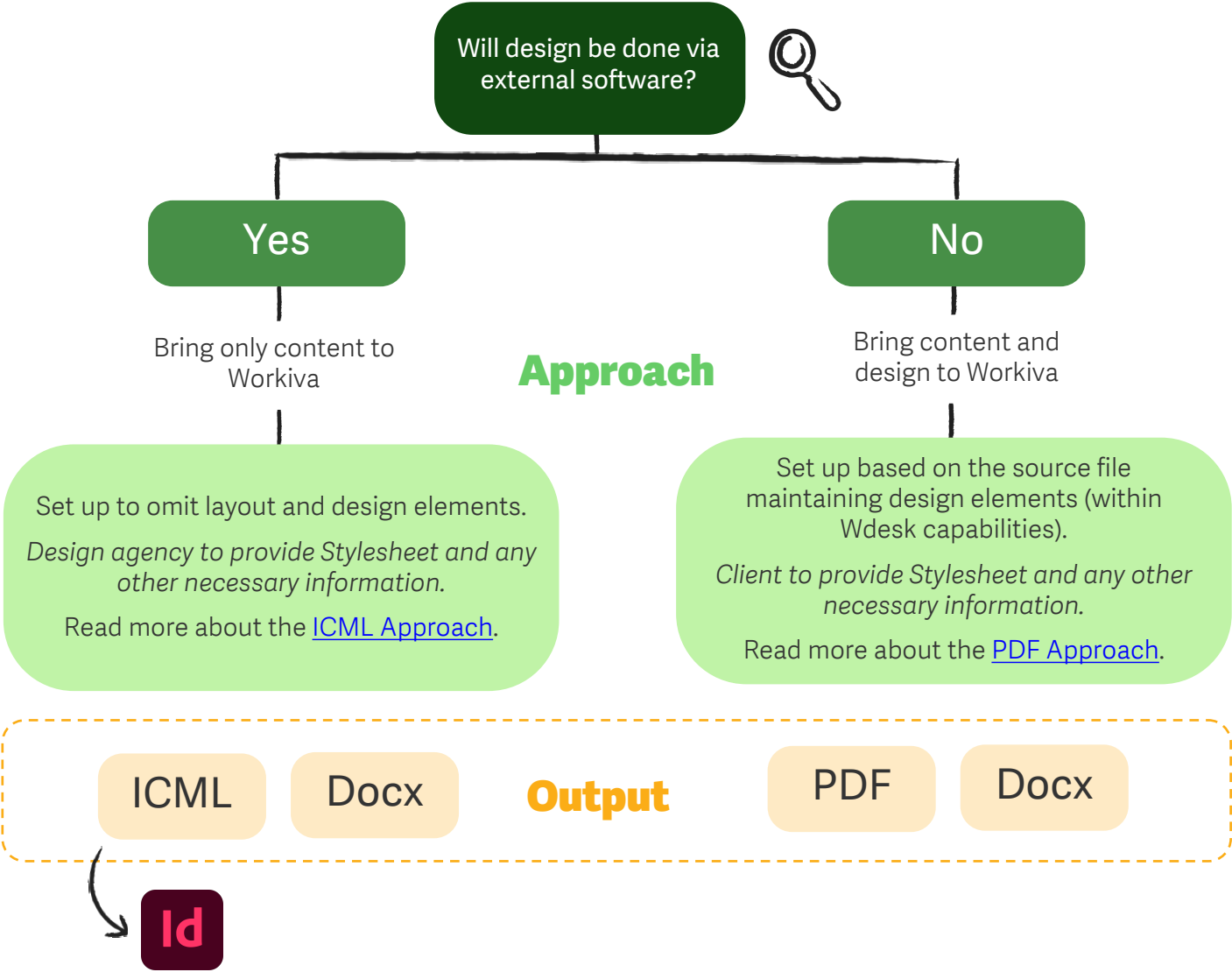
Report Outputs Options



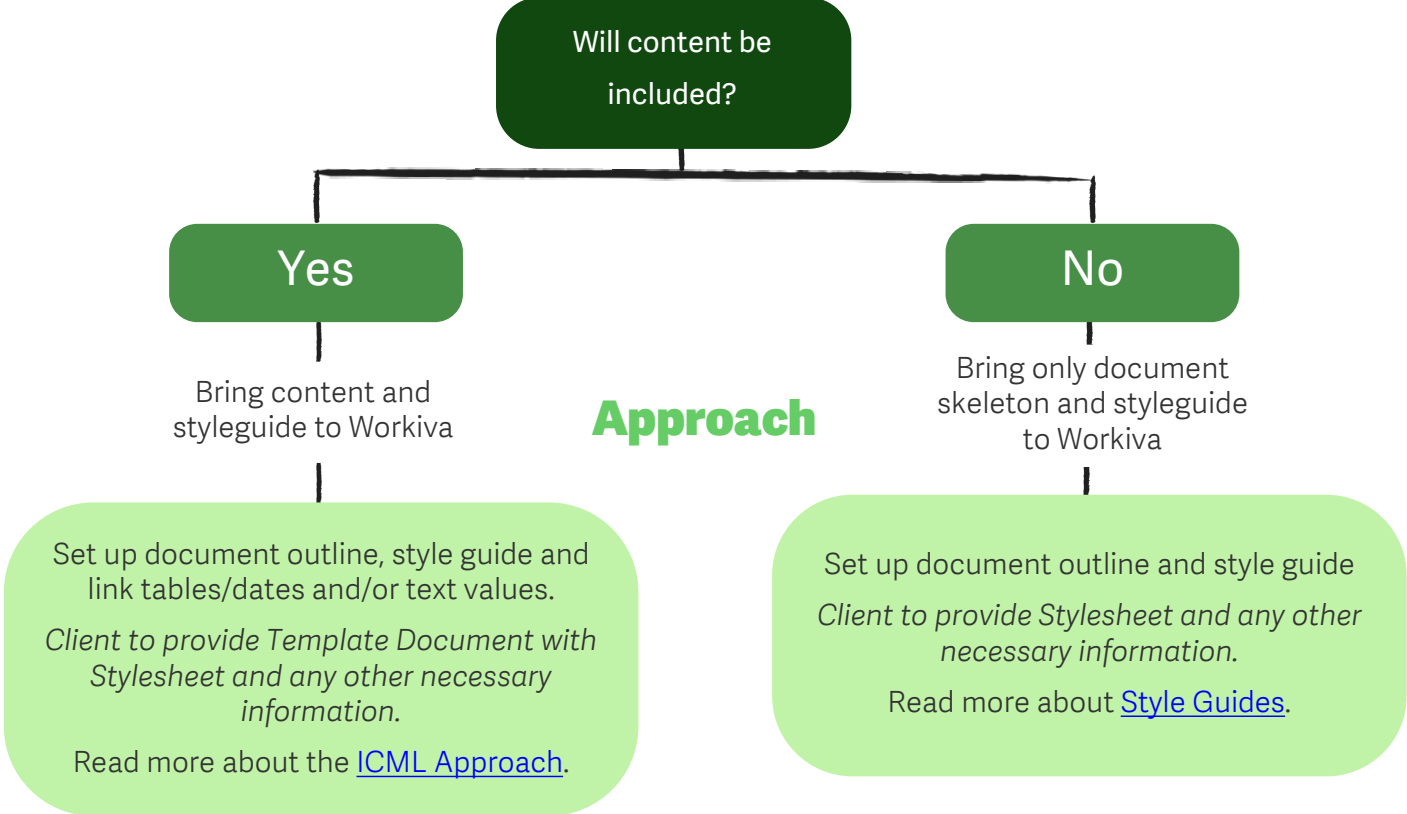
Recommendation:
Discuss & Agree Design Firm Coordination

* Setup of selected sections from the report.
 ** Layout, tables, visual elements, etc. Within Wdesk capabilities.

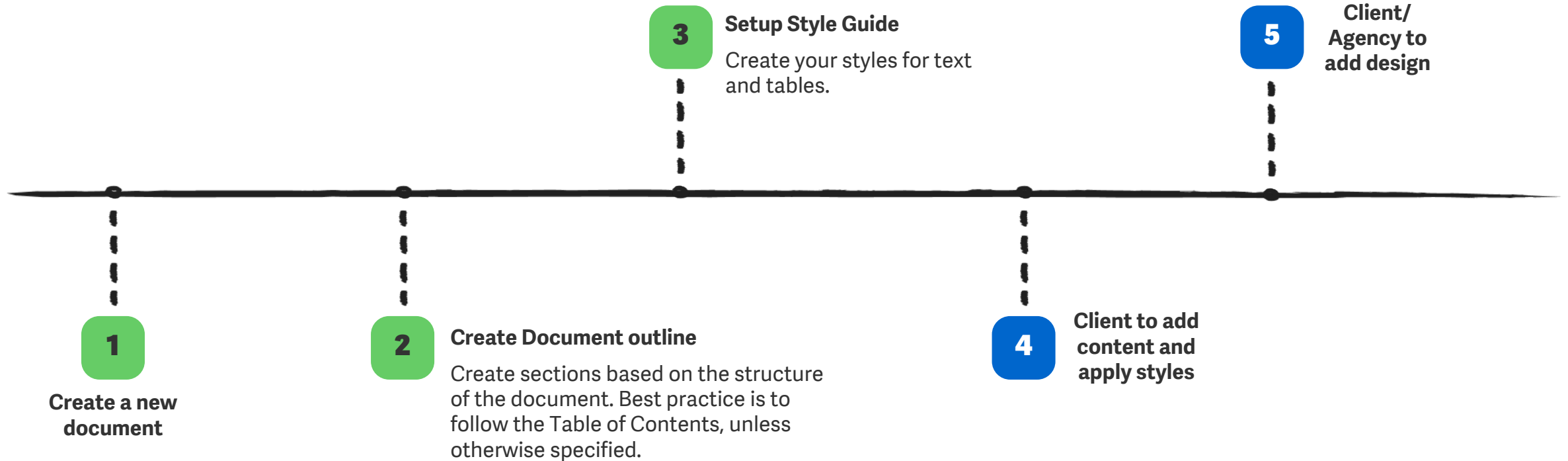
Report Design



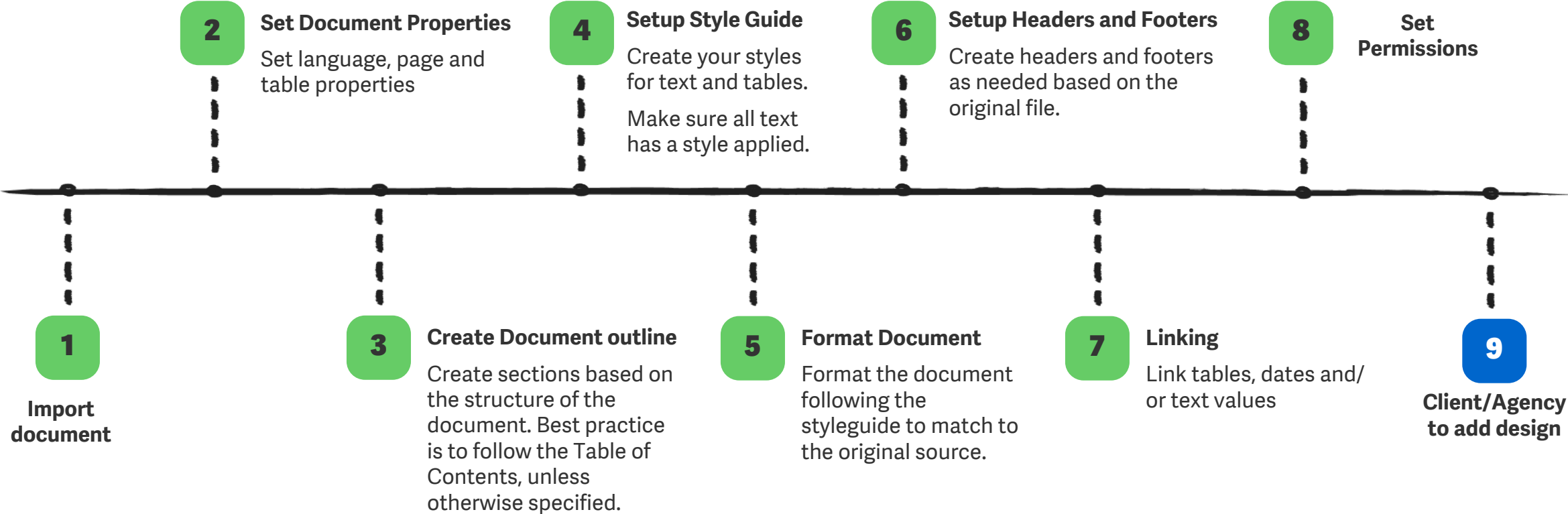
Report Content (Document)



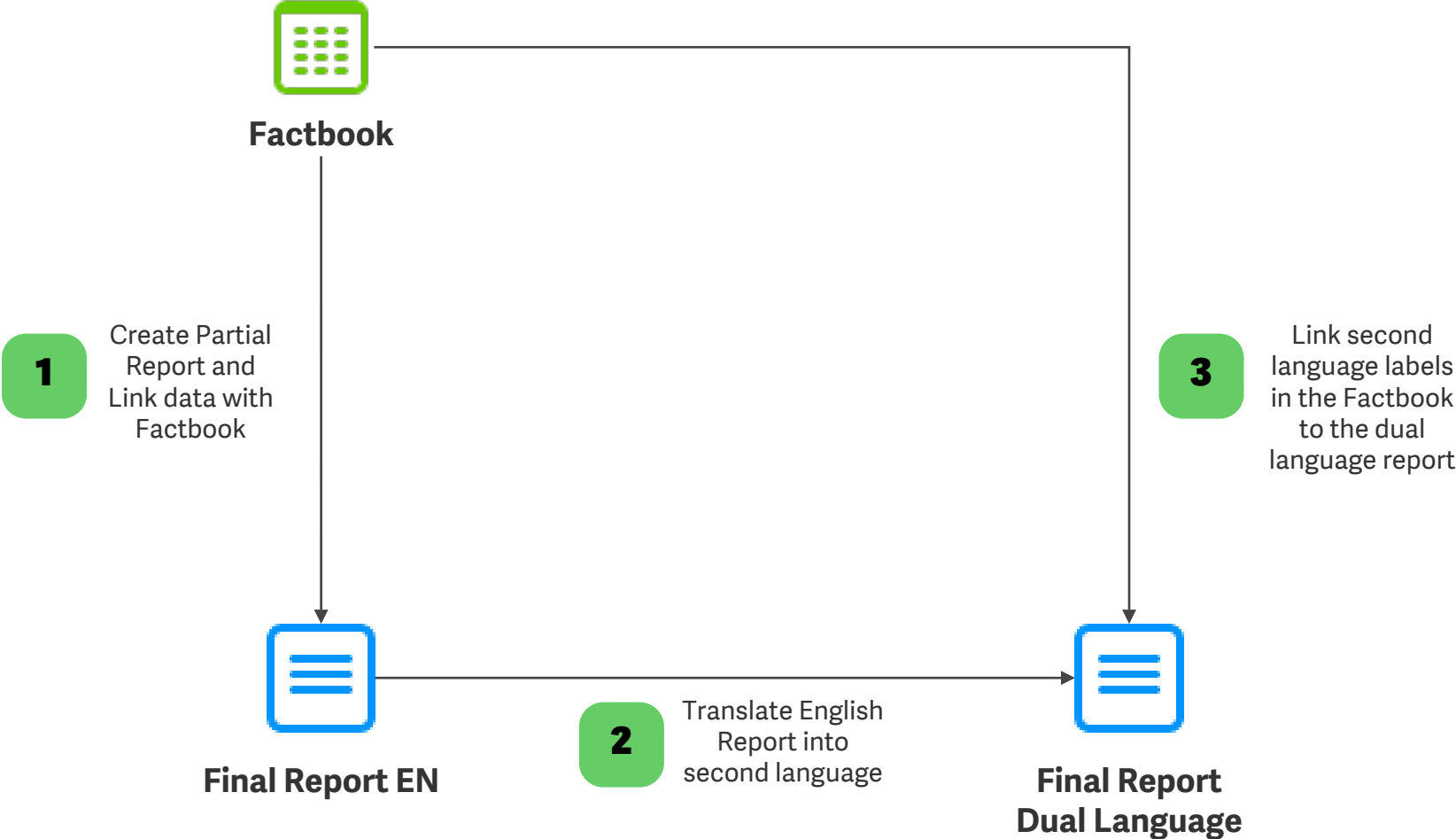
Skeleton Report



Partial/Full Report (External Design)



Dual Language Setup





Demo: Discovery - Reporting Outputs

Discovery Session - ESG Data Collection Templates

Customer DC Lead:

Provide the relevant source documentation and files for data collection, such as any existing spreadsheets used to collect data, and overviews of the data owner and approver.

Recommendations:

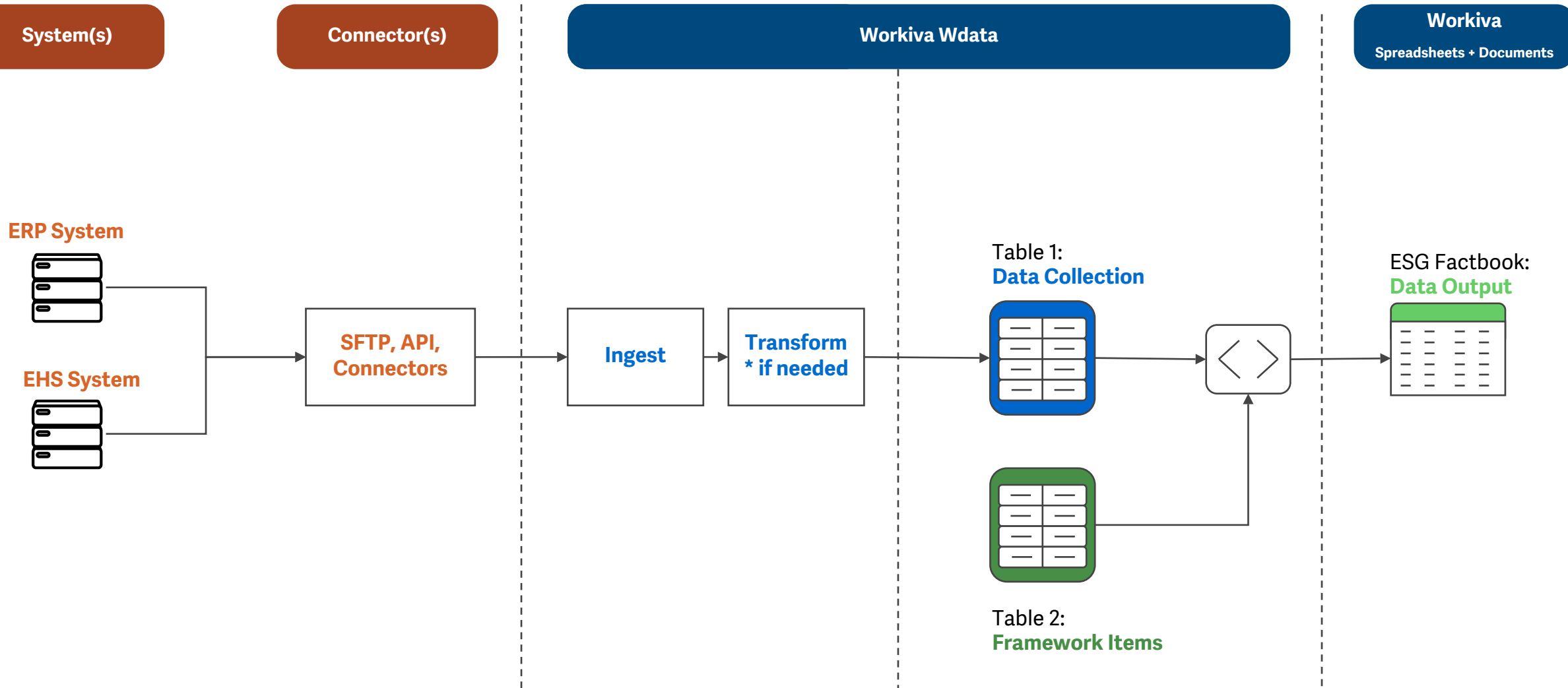
- Discuss and agree on data collection template approach
- Discuss and agree on data collection status tracking approach with data provider/approver tasks
- Test preliminary import if Data Collection Files are in .xlsx format
- Confirm with Customer which columns would be leveraged to define TAGS

[Workiva Support Site - Processes](#)



Demo: Discovery - Data Collection

Source System Connection High-level Overview



Discovery Session - ESG Source System(s) connection(s)

Customer Integration lead

If applicable, provide relevant information for connections to source system in the scope of the project, such as the system's name and its data reports. The client is responsible for bringing the appropriate skills and people for the source system to the call.

Recommendations:

- Discuss connection options, planning and phasing
- Share guides and other resource with client inclusive of connector details information
- Update planning in draft project plan to reflect agreed on approach

Data Discovery Components* - *If Connecting to Central Data Source*

Recommendations: Review of Provided Data

1. The objective is to understand the specifics of the client's process—what data moves where, the formulas used, etc.
2. Confirm with the client that they have all data collection and framework(s)/standard(s)/and questionnaire(s) information and mapping files needed for their current process.

- [Manage connectors for chains](#)
- [Connector types](#)

Recommendations: System Report Criteria

1. What data is available from the source system(s)? What does the client's process need?
2. The client IT lead is often not who generates the needed reports. In advance of this discussion, determine whether another team is involved in report generation.
3. If integration is via an API, request sample data and mapping files as far in advance as possible.

- [Manage GroundRunners for connections](#)
- [Chain Builder security architecture](#)

Discovery Session - ESG Frameworks / Questionnaires

Customer Frameworks Lead:

Provide the relevant source documentation and files for framework/questionnaire management, such as any existing framework outputs and mapping spreadsheets

Recommendations:

- Discuss & agree on framework/standards/surveys management approach
- Discuss & agree on future framework extensions and expansions approach
- Discuss & agree on data model for detailed ESG performance indicators in central factbook
- Update planning in draft project plan to reflect agreed on approach
- Summary recap email to client

[ESG Frameworks, Standards and Ecosystem](#)



Design & Build Phases

ESG Report Outputs

Best Practice Description:

Build an example of ESG output report (design preview) based on the files provided by the client.

Features:

- Set up example style guide & report based on client provided files
- Validation session on document setup with client + client signoff
- Duplicate steps above if more than one output report is in scope
- If the project involves an integration - ensure the integration provided data matches the client provided sample.

Deliverable: Example Linking

Best Practice Description:

Establish **a *single source truth*** for figures referenced multiple times, and ***granular control*** over how updates are published.

Recommendations:

- Link cells that will have values at some point, but not any truly blank or spacing cells.
- Use cell references for references between sections in the same spreadsheet
- Ensure the proof-of-concept includes examples of linking to presentations or documents as applicable
- Link majority/all dates from central dates page section in Data Collection Spreadsheet

[Linking Best Practices](#)

Demo: Design & Build
Linking & Style Guide



Demo: Design & Build

Data Collection

ESG Source system connections : Design & Build

Key Deliverable

If applicable & in scope build of connection to source system(s) | Customer Integration lead

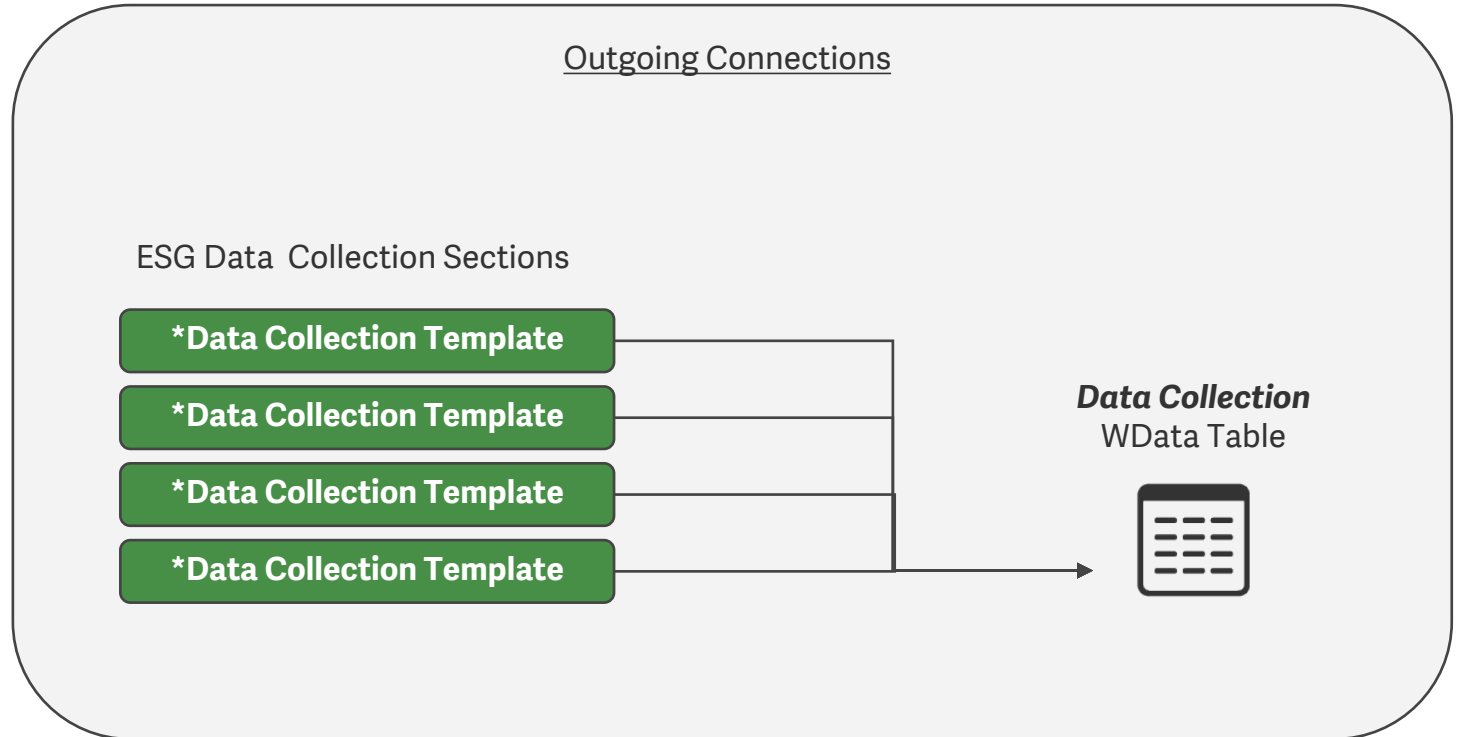
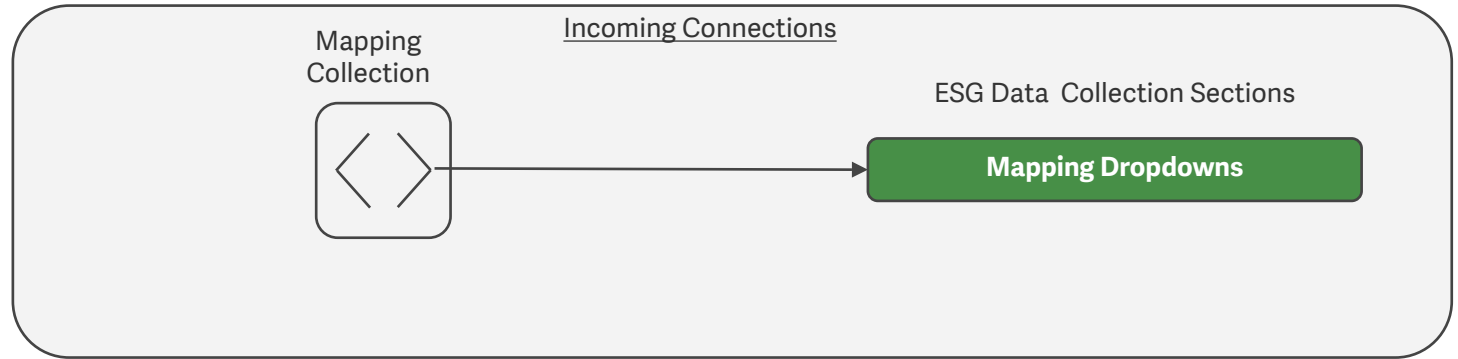
Deliverable Description:

- Connection of output report to ESG data model, provisioning of access to customer systems | Customer Integration lead
- [Connector types](#)
- [Manage connectors for chains](#)
- [Manage GroundRunners for connections](#)
- [Chain Builder security architecture](#)

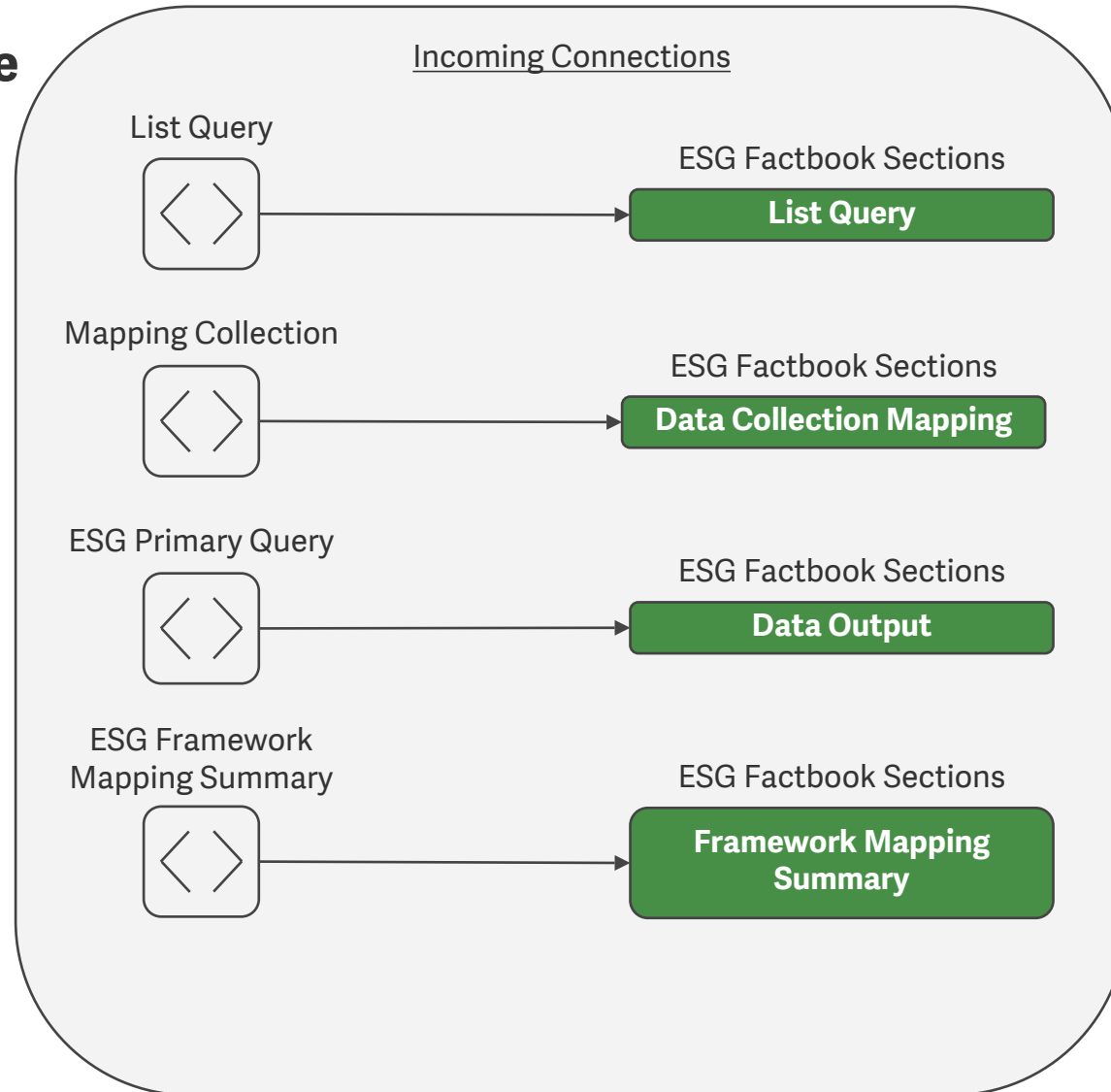
ESG Data Collection - Template

[Connect sheets to source Wdata queries](#) (Workiva Support Site)

[Connect sheets to destination Wdata tables](#) (Workiva Support Site)

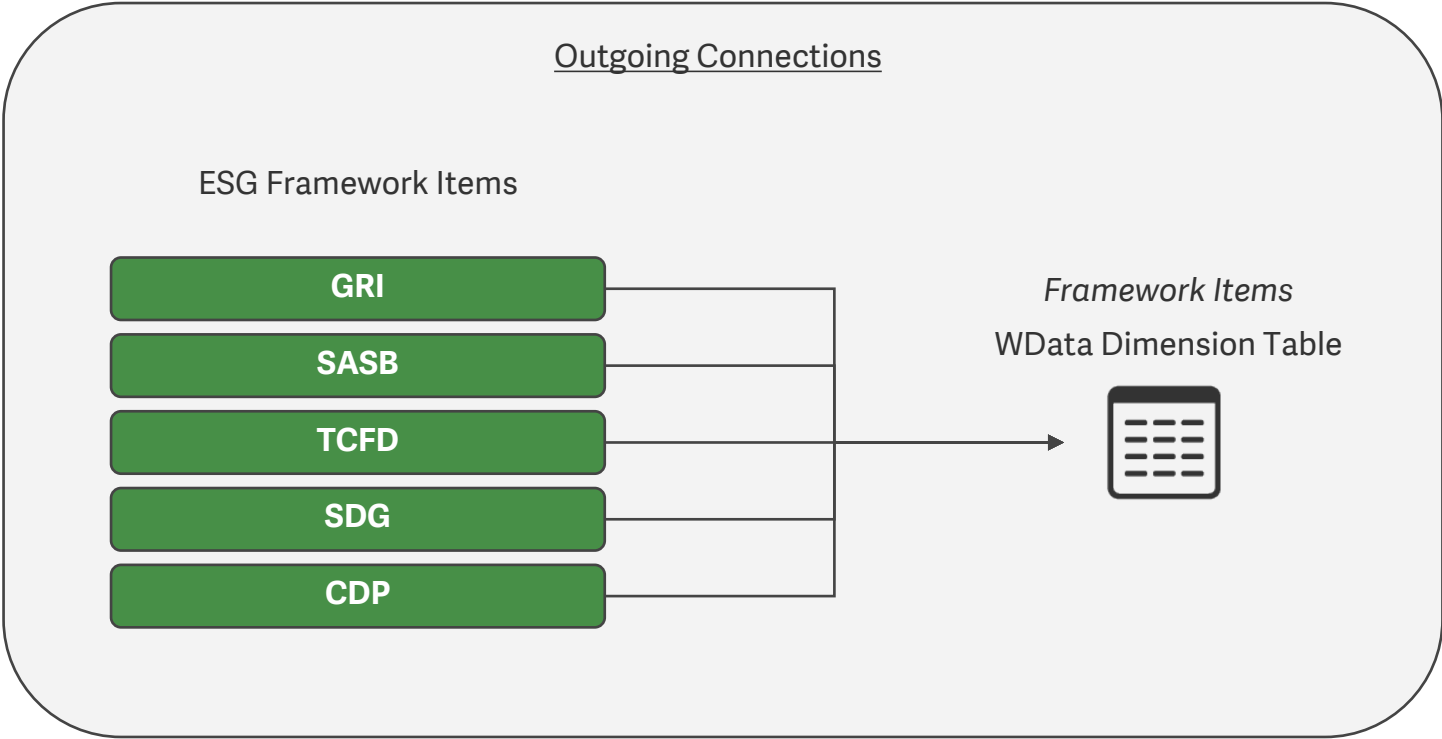


ESG Factbook - Template



[Connect sheets to source Wdata queries](#) (Workiva Support Site)

ESG Framework Items - Template



[Connect sheets to destination Wdata tables](#) (Workiva Support Site)



Demo: Design & Build - Frameworks

Enable Phase

Build Testing and Signoff

Description:

Final walkthrough of complete build

| Implementation Team & Customer ESG lead

Recommendations:

- Walkthrough journey of data flow from Data Collection to ESG Report
- Showcase Sample Data Entry, Data Collection Refresh, Factbook refresh and publish links
- Flexibility for supplementary validation and walkthrough sessions of the final build

[WDesk Support & Community](#)

End-user training

Best Practice Description:

Training all end-users of Workiva platform - Learning Hub Materials & Live Q&A Sessions

Features:

- Direct the client to relevant Learning Hub trainings.
- Topic-driven training based on client's process and needs.
- High level training agenda with session highlights to be provided to client in advance.
- Trainings should include working session(s) for remaining questions/issues.

[WDesk Support & Community](#)

Documentation

Description:

Draft and deliver Documentation of key build customization, as applicable to customer process


Recommendation:


- Roll-forward documentation - after publishing, steps to prepare for next year reporting cycle
- Configuration steps & maintenance guidelines
- Tailored Data Flow Diagram based on Design Decisions and Build Customization aligned with customer's process


[WDesk Support & Community](#)


Enablement Process Flow: (Tailor Diagram Flow according to Implementation)

Gather


①  **Processes:**
Data Owner Notification
and Tracking


②  **Framework Mapping**


③  **Data Collection Templates**


④  **External System (i.e. Workday, ORACLE,...)**

Organize



②  **Framework Mapping Table**

③ ④  **Aggregation Query**

③ ④  **Data Aggregation Table(s)**

Review

⑤  **ESG Fact Book Spreadsheet**


⑥  **GRI, SASB, TCFD, SDG, Framework(s)**

 **Custom Frameworks and Standards**

 **CDP Framework**


Consume

- Pre-built templates for core frameworks and KPI/Performance Tables
- All data provided through connected sheets with mapping applied - Single Source of Truth

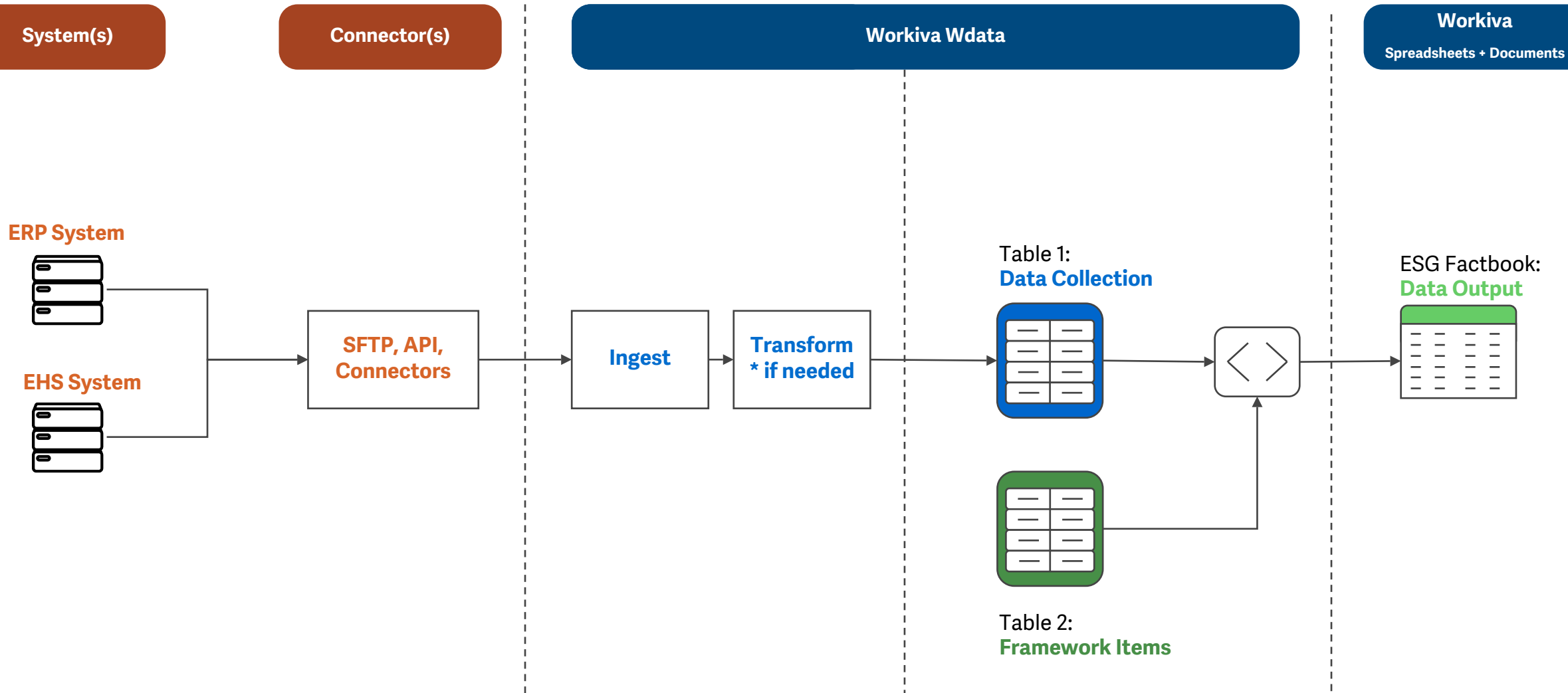
⑦ 

GRI Index **ESG Report** **ESG KPI Dashboard**

- Final Report(s)**
- CSR Report
 - Individual Framework/Questionnaire
 - Internal Dashboards/KPI Trackers

 **CDP .xlsx Submittal**
SS Export → CDP Portal

Source System Connection(s) High-level Overview



General Overview - Wdata Tables

Data Tables

- Used as the source data for Wdata queries - can be loaded with .TSV or .CSV files, API connections or Spreadsheet connections
- If a field is not being used for a calculation, or is not a true date, code it as text.
- Use a separate data table for each discrete system / source of data.

Dimension Tables

- Used as a mapping file for additional criteria used during a query - such as rollup categories.
- Ensure that dimension table line items are unique to avoid data duplication.
- Use the "Key" function for the lowest level of mapping (e.g. account number)
- Replace the source file when the criteria are updated, rather than uploading additional files.

[Workiva Support Site : Wdata Tables](#)

WData Table : Frameworks Dimension Table

Dimension Table stores Framework information that is used to reference Data Collection values via Queries

Framework items

- Save
- Preview
- Add Column
- Permissions
- Rename
- Feedback
- Help
- Tours

Description: Enter Table Description

COLUMN NAME	DESCRIPTION	COLUMN ID ?	COLUMN TYPE ?	IMPORT FORMAT	KEY ?
Topic	Enter column description	topic	Text 99		<input checked="" type="checkbox"/>
Section	Enter column description	section	Text 99		<input checked="" type="checkbox"/>
Disclosure	Enter column description	disclosure	Text 99		<input checked="" type="checkbox"/>
Framework	Enter column description	framework	Text 99		<input checked="" type="checkbox"/>
Item Level 1	Enter column description	item_level_1	Text 99		<input checked="" type="checkbox"/>
Item Level 2	Enter column description	item_level_2	Text 99		<input checked="" type="checkbox"/>
Item Level 3	Enter column description	item_level_3	Text 99		<input checked="" type="checkbox"/>
Aggregation	Enter column description	aggregation	Text 99		<input type="checkbox"/>
Description	Enter column description	description	Text 99		<input type="checkbox"/>
Value Type	Enter column description	value_type	Text 99		<input type="checkbox"/>
Industry	Enter column description	industry	Text 99		<input type="checkbox"/>

Datasets

Add Dataset

- GRI
Last Update: Apr 28, 2022 10:30 AM
- SASB
Last Update: Apr 28, 2022 10:21 AM
- SDG
Last Update: Apr 28, 2022 10:28 AM
- TCFD
Last Update: Apr 28, 2022 7:48 PM
- CDP
Last Update: Apr 28, 2022 10:27 AM

WData Table: Data Collection

Data Collection Table

Save Preview Add Column Permissions Rename Feedback Help Tours ¹

Column ID is unique and aligns with the Flat File Structure in the Data Collection Spreadsheet

Data Collection Data for current years and historical years across different ESG Topics

Description: Enter Table Description

COLUMN NAME	DESCRIPTION	COLUMN ID [?]	COLUMN TYPE [?]	IMPORT FORMAT
Topic	Enter column description	topic	Text ^{??}	
Year	Enter column description	year	Text ^{??}	
Data Type	Enter column description	data_type	Text ^{??}	
Tag 1	Enter column description	tag_1	Text ^{??}	
Tag 2	Enter column description	tag_2	Text ^{??}	
Tag 3	Enter column description	tag_3	Text ^{??}	
Tag 4	Enter column description	tag_4	Text ^{??}	
Value	Enter column description	value	Text ^{??}	
Data Provider	Enter column description	data_provider	Text ^{??}	
Reviewer	Enter column description	reviewer	Text ^{??}	
Status	Enter column description	status	Text ^{??}	

Datasets

Add Dataset

- Incidents Flat Sample Overlay
Last Update: May 23, 2022 4:04 PM by P
- Site - LA - Starter Pack
Last Update: Apr 29, 2022 11:54 AM by I
- Site - KS - Starter Pack
Last Update: Apr 29, 2022 11:54 AM by I
- Site - CO - Starter Pack
Last Update: Apr 29, 2022 11:54 AM by I
- Site Consolidation - Starter Pack
Last Update: Apr 29, 2022 11:53 AM by I
- Organization Info - Starter Pack
Last Update: Apr 29, 2022 11:53 AM by I
- Emissions File - Starter Pack
Last Update: Apr 28, 2022 5:53 PM by P

Table Preview

TOPIC	YEAR	DATA TYPE	TAG 1	TAG 2	TAG 3	TAG 4	VALUE	DATA PROVIDER	REVIEWER	STATUS	COMMENT
-------	------	-----------	-------	-------	-------	-------	-------	---------------	----------	--------	---------

General Overview - Wdata Queries

Best Practices

- Targets information that is needed.
- Set parameters for the criteria most likely to change over time (e.g. Year or date)
- Consolidate what you need. If you do not need the data, leave it where it is.

Worst Practices

- Query out all off the data from the data tables
- Manually update settings for each run of the query
- Workstreams designed with over 1M+rows of a query result

[Workiva Support Site : Wdata Queries](#)

WData : Primary Query

Results of Primary Query organize Data Collection information with their associated Framework and User Defined Tags

The screenshot displays the WData Primary Query interface. On the left, the 'Sources' panel lists 'Calculation', 'Data Collection Table', and 'Framework items'. The central 'Fields' panel shows a table with columns for 'HEADER', 'SOURCE', and 'SOURCE COLUMN'. The 'Parameters' panel on the right lists query parameters like ':Frameworks', ':SASB Industry', and ':Year' with their default values. Arrows point from text boxes to specific elements in the interface.

HEADER	SOURCE	SOURCE COLUMN
Topic	Data Collection Table	topic
Year	Data Collection Table	year
Tag 1	Data Collection Table	tag_1
Tag 2	Data Collection Table	tag_2
Tag 3	Data Collection Table	tag_3
Tag 4	Data Collection Table	tag_4
Value	Data Collection Table	value
Data Provider	Data Collection Table	data_provider
Framework	Framework items	framework
Item Level 2	Framework items	item_level_2
Description	Framework items	description
Key Data Output	Multiple	Multiple
Key KPI	Multiple	Multiple
Key Frameworks	Multiple	Multiple

Parameter	Default Value
:Frameworks	[GRI, SASB, TCF...]
:SASB Industry	[None]
:Year	[2020, 2019, 20...]

Primary Query leverages the Data Collection Table and Framework Items to Organize Data into a central data stream

The Primary Query outputs values in Data Collection table that match the Framework, SASB Industry, and Reporting Year

Query Parameters are defined and interact as Filters across the Frameworks, SASB Industry, and Reporting Year

WData : List Query

The screenshot displays the WData List Query interface. At the top, there is a toolbar with icons for Save, Run Query, Reset, Create View, Permissions, Properties, Feedback, Help, and Tours. Below the toolbar, the interface is divided into several sections:

- Sources:** A list of data sources including "Data Collection Table" and "Framework items".
- SQL Editor:** A text area containing a complex SQL query. The query starts with a comment: "-- primary query" and "-- TODO add though WData UI once feature is active in production". It uses a CTE named "primary_query" and a SELECT statement with numerous columns from "Data Collection Table" and "Framework items". The columns include "topic", "section", "disclosure", "year", "tag_1" through "tag_4", "value", "data_provider", "framework", "item_level_2", and "description". The query also includes a FROM clause for a table identified by a long alphanumeric string.
- Parameters:** A section on the right with an "Add" button and two parameter entries: ":Frameworks" with a default value of "[GRI, SASB, TCF...]" and ":SASB Industry" with a default value of "[None]".
- Results:** A table at the bottom showing 13 columns: TOPIC, SECTION, DISCLOSURE, TAG 1, TAG 2, TAG 3, TAG 4, KPI DROPDOWN, FRAMEWORK, GRI CODE, SASB CODE, SDG CODE, and TCFD CODE. The first row of data is visible.

Two callout boxes provide additional context:

- The first callout box, pointing to the SQL Editor, states: "Unless the customer team has someone that is fluent in SQL Presto Syntax, we recommend that the 'List Query' remain unchanged unless specifically needed during project implementation".
- The second callout box, pointing to the Parameters section, states: "List Query uses both Data Collection, Framework Table, and filters results according to matching parameters".

WData : Mapping Query

Mapping Collection

Save Run Query Reset Create View Permissions Properties Feedback Help Tours

Sources

Fields Filters Sort Relationships Builder SQL

HEADER	SOURCE	SOURCE COLUMN
Look-Up	Framework items	Multiple

Drop column to include in query results

Field Properties

Header *
Look-Up

Calculation ?
1 CONCAT({1}, ' - ', {2}, ' - ', {3})

Included Columns

- topic / Framework items
- section / Framework items
- disclosure / Framework items
- Drop columns to include here

Apply

Query Syntax is Good

Mapping Query Organizes Topic-Section-Disclosure from the Frameworks in a way that is user-friendly to organize information in the Data Collection Flat File(s)

Query leverages Builder Mode with Calculation interface and we recommend this query remain unchanged unless specifically required in a custom implementation

WData : Framework Mapping Summary

ESG Framework Mapping Summary

Save Run Query Reset Create View Permissions Properties Feedback Help Tours

Sources

- Framework items
 - TOPIC
 - SECTION
 - DISCLOSURE
 - FRAMEWORK
 - ITEM LEVEL 1
 - ITEM LEVEL 2
 - ITEM LEVEL 3
 - AGGREGATION
 - DESCRIPTION
 - VALUE TYPE
 - INDUSTRY
 - YEAR
 - TAGS
 - FILENAME

SQL Editor

```
1 SELECT
2 Topic,
3 Section,
4 Disclosure,
5 array_sort(filter(array_agg(
6 framework_item_agg['GRI']), x -> x IS NOT NULL)) AS "GRI",
7 array_sort(filter(array_agg(
8 framework_item_agg['SASB']), x -> x IS NOT NULL)) AS "SASB",
9 array_sort(filter(array_agg(
10 framework_item_agg['SDG']), x -> x IS NOT NULL)) AS "SDG",
11 array_sort(filter(array_agg(
12 framework_item_agg['TCFD']), x -> x IS NOT NULL)) AS "TCFD",
13 array_sort(filter(array_agg(
14 framework_item_agg['CDP']), x -> x IS NOT NULL)) AS "CDP"
15 FROM (
16 SELECT
17 "Framework items"."topic" AS "Topic",
18 "Framework items"."section" AS "Section",
19 "Framework items"."disclosure" AS "Disclosure",
20 "Framework items"."industry" AS "Industry",
21 map_agg(
22 "Framework items"."framework",
23 "Framework items"."item_level_2"
24 ) framework_item_agg
25 FROM "QWNjb3VudB8yMDcxMjExMDI0"."b9ea8658a06348d4acf7cd5fd9b0dc9e" AS "Framework items"
26 WHERE "Framework items"."framework" IN :Frameworks
27 GROUP BY
28 "Framework items"."topic",
29 "Framework items"."section",
30 "Framework items"."disclosure",
31 "Framework items"."industry",
32 "Framework items"."framework",
33 "Framework items"."item_level_2"
34 LIMIT 1000000
35 )
36 WHERE Industry = 'All' OR
37 Industry IN :Industry
```

Parameters

- :Frameworks default = [GRI, SASB, SDG,...]
- :Industry default = [None]

Query Syntax is Good

Export 149 RESULTS

	1	2	3	4	5	6	7
1	TOPIC	SECTION	DISCLOSURE	GRI	SASB	SDG	TCFD
2	Economic	Anti-competitive Behavior	Legal actions for anti-competitive behavior	[206-1]	[]	[Target 16.3]	[]

Unless the customer team has someone that is fluent in SQL Presto Syntax, we recommend that the "Framework Mapping Summary Query" remain unchanged unless specifically needed during project implementation

Mapping Summary Query uses the Frameworks Table, and filters results according to matching parameters

Go Live

Roll Forward

Roll Forward Key Themes

Historical Data



- How does your customer need to store historical data?
- Would a manual process work for the customer?
- How much historical data needs to be retained?

Refreshing Data



- Will your customer append or replace existing data?
- Do mapping criteria need updated?
- How often must data be updated?

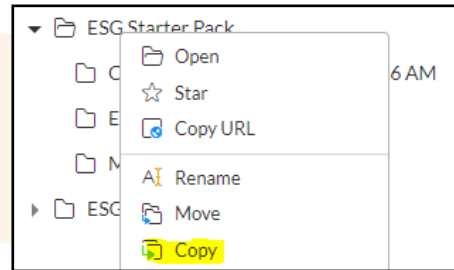
Publication



- How often is the final reporting deliverable published?
- Who will be responsible for publishing the updated data?
- What format is the final deliverable needed in?

Rollforward Best Practices Steps - Copy Folder

Copy Folder & Keep Connections



Rollforward Steps

- Copy ESG Folder that Contains Core Files (From File/Home view in Workiva)
- Default Selections
 - Create copies of all source files
 - Connections : Incoming & Outgoing Connections
- Folder name w/ new Reporting Year : 202X
- Refresh Outgoing Connections and Rename with New Reporting Year

