workiva AI

Experience gen AI designed for assured integrated reporting.

The excitement around generative AI is real, but for reporting professionals to realize those benefits, the need for data security and domain-specific application is paramount.

That's why we built Workiva AI—so finance, audit, risk, and sustainability teams can capitalize on the promises of generative AI to accelerate productivity, increase quality insights, and reduce risk—all within a secure, trusted environment.

Workiva AI is more than just the latest technology—it's a solution built to address the unique challenges faced in assured integrated

reporting, so you can streamline workflows, scale resources, and free your time for more strategic initiatives.

Think of Workiva AI as your intelligent companion, purpose built to amplify your impact and achieve more with less—whether you're analyzing a debt agreement, creating an ESG double materiality assessment narrative,or preparing a SOX narrative for revenue recognition, among other things!

Customer Data
- Not used to train gen AI models
- Encrypted

Inputs to Gen AI
- Not cached beyond the session
- Requires active input and engagement

Gen AI Responses
- Does not run in background
- Does not update files without approval
- Based on content filtering + context guardrails
- Can opt out at any time

Securely access cutting-edge AI

Experience the latest in generative AI technology, developed with Workiva's commitment to responsible data stewardship. Your sensitive data stays protected—never stored, shared, or used to train the models.

Choose your industry-leading model

Select the ideal Large Language Model (LLM) from top providers to perfectly match your needs, preferences, or project requirements.

Boost productivity, scale effortlessly

Leverage AI-powered assistance to streamline your workflow without ever leaving the Workiva platform. Reference your files for contextualized responses, saving valuable time that adds up—empowering your team to focus on strategic initiatives and ultimately scale operations.

AI uniquely designed for your challenges

Tackle the unique challenges of financial reporting, audit, risk, and sustainability with AI designed specifically for you. Leverage file intelligence and our prompt library to accelerate common processes, drive efficiency, and innovate with your own data.
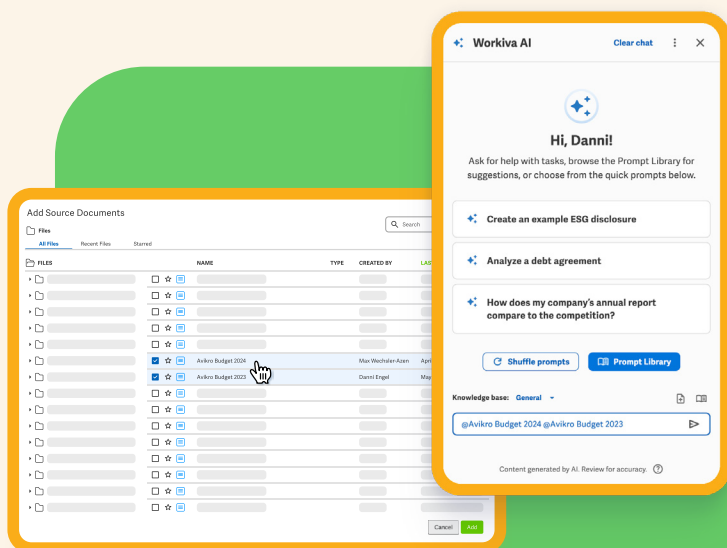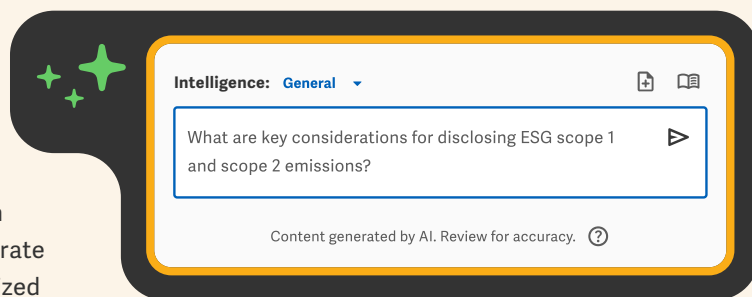
workiva

The leading cloud platform for connected data, reporting, and compliance solutions.

Collaborate with an Intelligent Companion

The world of assured integrated reporting is complex—but you don't have to go it alone. Your Workiva AI Companion was designed for you and the work you do every day. Collaborate any time to automate a manual workflow, generate personalized insights, and reduce risk with intelligent analysis.

Just remember: Your Companion is still artificial—all responses are intented to augment, not replace, your expertise and review.

Intelligence: General ▾

What are key considerations for disclosing ESG scope 1 and scope 2 emissions?
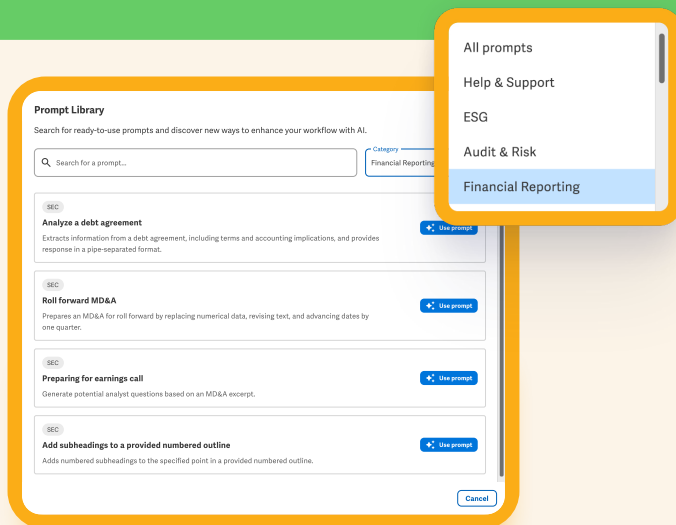
Content generated by AI. Review for accuracy. ?

Personalize your results

You do your most important work in the Workiva platform—and store you most important work there too. Put that data to use by asking the Workiva AI Companion to securely reference specific content anytime, with file intelligence. Accelerate your work with responses personalized to your immediate needs.

Get started quickly

Not sure how to get started? Stumped on a potential prompt? Open the prompt library any time for a selection of pre-crafted prompts designed for Financial Reporting, Audit, Risk, and Sustainability Management use-cases— so you can work faster, smarter, and with greater insight.
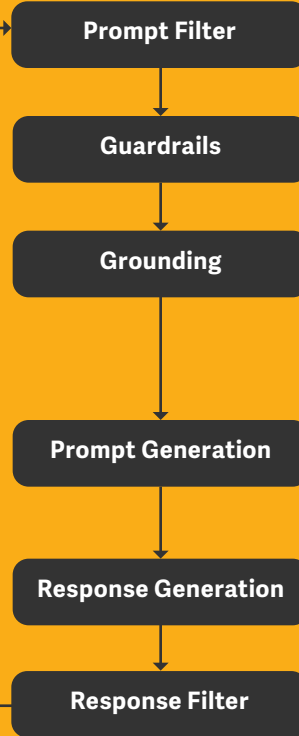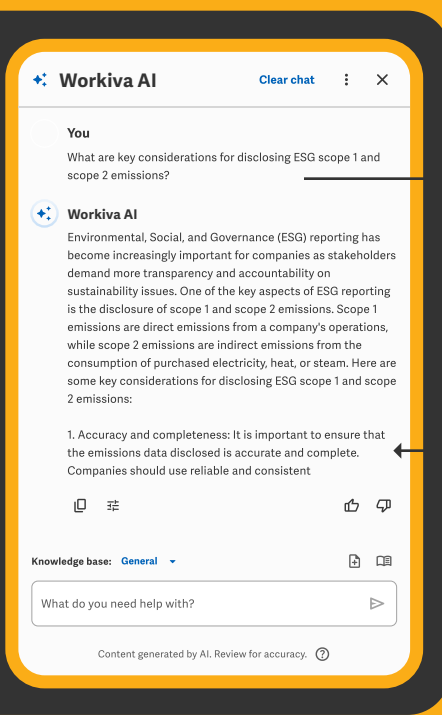
> **"Workiva AI has allowed us to provide high-quality summaries in a fraction of the time, allowing for faster and more informed decision-making across the board."**

Heather Holding
ERM & Chief Privacy Officer

Best Egg

How Workiva AI works

Workiva AI Clear chat

You
What are key considerations for disclosing ESG scope 1 and scope 2 emissions?

Workiva AI
Environmental, Social, and Governance (ESG) reporting has become increasingly important for companies as stakeholders demand more transparency and accountability on sustainability issues. One of the key aspects of ESG reporting is the disclosure of scope 1 and scope 2 emissions. Scope 1 emissions are direct emissions from a company's operations, while scope 2 emissions are indirect emissions from the consumption of purchased electricity, heat, or steam. Here are some key considerations for disclosing ESG scope 1 and scope 2 emissions:

1. Accuracy and completeness: It is important to ensure that the emissions data disclosed is accurate and complete. Companies should use reliable and consistent

Knowledge base: **General**

What do you need help with?

Content generated by AI. Review for accuracy.

Prompt Filter
User inputs are filtered to adhere to guidelines, eliminating off-limits requests

Guardrails
Boundaries are set for generating responses, using factors like context, intent, and persona. As a result, responses generated are more relevant and aligned with your need.

Grounding
We leverage embeddings and retrieval augmented generation (RAG), consider the solution and file type being used, and offer templates for specific Workiva-exclusive extensions, such as Workiva Support or ESG European Sustainability Reporting Standards content. We also provide citations and references for responses, indicating their source.
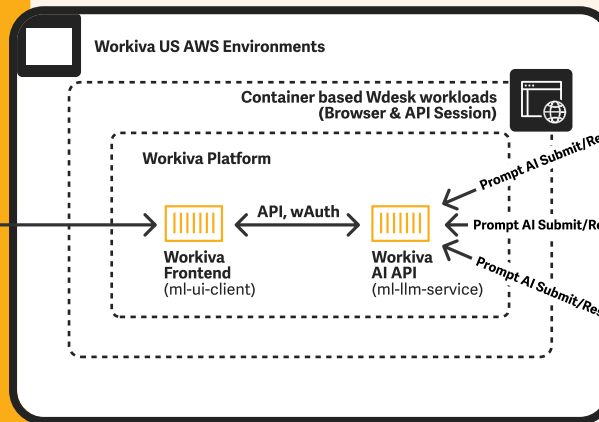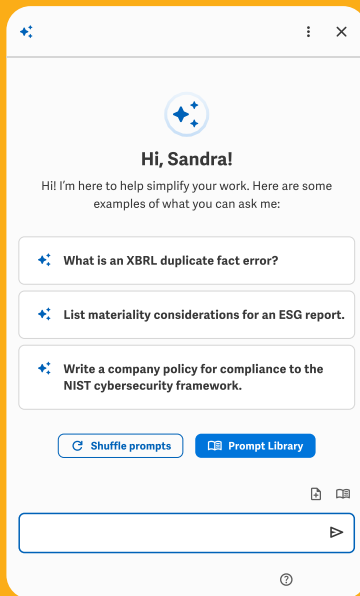
Prompt Generation
Prompts and model parameters create a user-friendly experience–including predefined commands like "shorten" or "elaborate," as well as prompt-tuning with industry terms to avoid confusion (e.g. 10-K report vs. 10-K run)

Response Generation
Reports are generated based on advanced AI models from industry leaders such as Google, Microsoft/OpenAI, AWS/Anthropic.
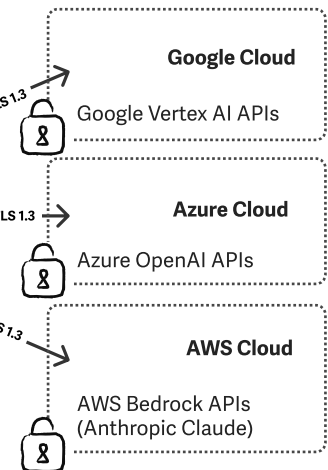
Response Filter
Reports are filtered to exclude inappropiate or prohibited content, such as unethical terminology. **Visit our Gen AI security hub for our vendors' ethical AI policies.**

Workiva AI Architecture

More information about the large language models (LLM) Workiva uses in their gen AI experience can be found at workiva.com/genai-security.

Hi, Sandra!
Hi! I'm here to help simplify your work. Here are some examples of what you can ask me:

- What is an XBRL duplicate fact error?
- List materiality considerations for an ESG report.
- Write a company policy for compliance to the NIST cybersecurity framework.

Shuffle prompts   Prompt Library

Workiva US AWS Environments

Container based Wdesk workloads
(Browser & API Session)

Workiva Platform

Workiva Frontend
(ml-ui-client)

API, wAuth

Workiva AI API
(ml-llm-service)

Prompt AI Submit/Response, TLS 1.3

Prompt AI Submit/Response, TLS 1.3

Prompt AI Submit/Response, TLS 1.3

Foundation Model Services (US) (GCP,Azure,AWS)

Google Cloud
Google Vertex AI APIs

Azure Cloud
Azure OpenAI APIs

AWS Cloud
AWS Bedrock APIs
(Anthropic Claude)

Data security measures throughout the experience:
- Encrypted at rest while cached
- Encrypted in transport (1.2+)
- Not cached outside a session with our secure LLM providers

Data security measures with each LLM provider:
- Providers cannot access customer prompts or data
- Data enters and leaves only through API calls

Read more about Workiva AI security and common FAQs at workiva.com/genai-security.

Workiva AI can be accessed via the global toolbar across the entire Workiva platform and leveraged directly in documents, spreadsheets, and presentations.

Ready to get started?

If you're a current customer, request access today at workiva.com/getgenai, or scan the QR code below:

Not a Workiva customer?
Learn more at workiva.com/genai

"This is exactly the kind of generative AI implementation we want to use from a data security standpoint."

CIO, SVP of Internal Audit
Commercial & Consumer Finance Company

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