

Discovery Data Collection Part 3 - System Connectors

During the discovery session stage, it may be relevant to revisit the source connections topic and dialogue leveraging a similar kind of slide highlighting a system connection overview as a starting point to identify the processes and systems involved and potential paths to access these via the Workiva platform. We recommend that there be specific IT involvement from the customer team to both design and build each connection to one or multiple systems. This will be a necessary step to ensure that they're set up for success after the project completion and after enablement in hand off to the customer team. We outline at a high level the usual types of connections with a couple of key recommendations. For SFTP, a premium connector that is usually easier to maintain if a client prefers to work with their own system tools instead of leveraging Workiva based chains ecosystem. Some client security teams may prefer SFTP based on their IT security policies, especially if there's a requirement to connect to their in house system and their internal network. For SFTP a client is required to set up their own server and potentially create Cron jobs for each application that needs to push data files to the server. Another common option that is discussed is an API and this is ideal if you're looking to facilitate real time data polls for systems that may not yet be supported with specific tailored connectors. As an example, there is a template connection for clients who may use certain kinds of VHS systems, thereby providing a guide for how client would need to be able to set up the specific API calls and we also recommend sharing with the IT team the platform side of chains in order to address any kinds of updates or how data is being pushed to the Workiva platform. And then finally certain kinds of branded connectors that already geared or designed to tie in for things like MySQL, Netsuite, certain kinds of Oracle reporting instances and other kinds of reporting tailored platforms, inclusive of things like Anaplan or even a workday connector. These can be enabled on the account and we just recommend that you ensure that the customer's subscription matches the different premium connectors that may be needed to connect to these systems.