

Discovery Data Collection Part 3 - System Connectors

As we continue the discovery of unstructured templates, we recommend listing out via matrix, the overview of relationships between topics, data providers, data approvers and the information that would be captured as well as the kind of data capture that information would feed in. Here we highlight if a data collection might need location and business unit permissioning as an example of different sites in different states, thereby toggling and setting permissions or identifying these with customers on who would have read, write or even view access. Further outlining who are the data providers and approvers, in order to identify if there is a need for a more senior executive level approval review of experience whereby a senior team lead would just navigate to a single sheet for final review. Here it's also helpful to highlight via the data point tracking, if there is a detailed status needed on specific data points, where we would recommend leveraging a resource like processes by selecting the plus button on the left and selecting processes as an option, thereby allowing you to define the sections, the date and the title that would automate tasks once capturing data. This does require an initial setup and a specific section selection, but once accomplished the first time, if the process is expected to repeat across reporting cycles, should provide efficiencies for the customer team. Once there is a high level understanding on how the different unstructured templates will be broken down by topic, data provider, data approver and data points, we can segue into the requirements of establishing or setting up each kind of data collection.

We recommend starting off with a consolidated flat template file that at times may be run via an Excel process that has a great amount of unstructured data. A flat template file is one of the options that is easiest to maintain once set up and we recommend talking through the framework mapping as an example here as well as a new hiding respective columns of a topic section and disclosure, which highlights how the data would be organized when mapping to respective frameworks. Here it's also helpful to understand who would be those specific providers or approvers for these individual data points and it's also helpful to identify if there is value for those data providers to have context of the historical information that was entered as they provide data for a current year. We can segway here to an example where there are some sample values, selected sample data providers and approvers. This is meant to set the stage and ground the customer and highlight that it is also an interactive and collaborative experience.

Another approach to setting up data collections in discovery with the customer is leveraging an existing file as an overlay template. This allows more granular control of not only input but also a tailored experience. If this customer team is used to inputting data in a certain kind of format and style. Highlighted here, we see some community metrics with also some customer provided framework mapping across SASB and GRI. We recommend discussing with the customer team what values and columns would be those to capture and store as part of this data collection process. In overlay sheet we are able to more explicitly define where a data provider would be able to input that information by defining input cells, thereby locking all other cells or any data provider unable to change this content outside of anything that is actually defined as an input cell. We then recommend gauging how the information flows from the value identified columns to a flat file that would then be connected to Wdata. In this pre populated example we've taken a customer overlay sheet and highlighted what would be the topic sections of disclosure which we recommend to confirm with that customer team as well as the kind of unit measure, the metrics associated with whether it's a text value, numeric value and then can also further define who would be the providers, reviewers and status tracking if this is something that's important for the customer team. We'll highlight that the data validations that have been set up in

this flat file are tailored and customized and there's a specific section to which these data validations point towards where we've outlined the description and the metrics from the overlay here.

We also recommend and it's helpful to ground the customer on how a topic and section and disclosure work together as an example, we filtered in our framework mapping spreadsheet the GRI codes for this topic that lives within social, local communities and the rights of indigenous peoples. Inclusive of their descriptions this topic section and disclosure allows to organize data and provide point of view on how it would also correlate as an example with SASBI for some of the metrics that the customer is capturing. If a customer has more detailed framework mapping, we recommend that be provided as it will help guide the build and how data is stored in the Wdata table. And lastly in terms of the unstructured data, we recommend also showcasing an import template leveraging functionality like Wdesk sync, if there is a lot of data that would be parsed potentially from an output file that the system would generate, here it's helpful to discuss what would be the column structure that is outputted from a potential export file where they are capturing data in this example, you know, potential workforce metrics and ensure that the columns are in place to meet this format. Teams would be able to use tools like Wdesk sync which are highlighted further in the Workiva support website that are plug ins that enable them to quickly push data from an Excel file if structured into a spreadsheet as long as the mapping and the column structure is the same as that file.