

Discovery External Connectors

If the project is scoped to include connections to source systems, we recommend that the clients IT team liaisons be present focusing that the clients are the ones that have administrative privileges in their systems and they are indeed responsible for providing the key stakeholders or facilitators that have those necessary IT interface skills and knowledge to this discovery session column. There are different conversations around the connection options, some of the planning and also potentially phases which may be involved for a future phase as well as sharing the support and resource documentation and materials to provide to the clients IT team. Due to the fact that source system connections might have some key dependencies, we do recommend that this be highlighted in the project plan to identify if this will be something after a phase one approach and then re engage in phase two or if there will be a critical need to have a source system connection established prior to beginning work in the data model. For purposes of a high level of discovery, we do want to highlight what that overview of a source system connection would be into Workiva from a sample maybe ERP or EHS system that would typically be facilitated via connector, some being some of the core connectors or premium connectors that are available to be selected within the workspace and ensure that it matches the correct subscription need for that premium connector.

We typically see options like the SFTPs, a cloud runner that authenticates via the cloud or even a ground runner for something would be installed in that client server architecture that then liaise with Workivas WData interface that both ingests and transforms potentially if needed, although we do recommend that the data be structured in a way that is ready to be consumed in the data collection model and it is also very friendly to some of the framework items that are being reported. This allows the data flow across the source system to Workivas spreadsheet, which is ultimately to be staged in the fact and then prepares for the final publishing and formatting. As we consider the discovery components if connecting to the central data source, we do recommend asking what is the data that's available to be potentially pulled out from that Central data source and what does the client's process need. The client IT lead is often the case not the one that's involved in the final report creation so there does generally need to be an alignment between the key reports stakeholders and if another team would need to be involved in order to ensure that the correct information is populated for the report. At times an integration via an IPI would be needed and we recommend requesting sample data and mapping files well in advance in order to help facilitate these conversations. There are also additional resources that touch on topics of managing connectors, the different types of connectors establishing installing the ground runners and also some of the security and architecture that may be necessary to provide to an IT team.