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Understanding Workiva Public APIs & Workiva Scripting

Jesus Bouzada Senior Product Manager

Aaron Robles Senior Product Manager **Chris Omland** VP of Product





Today's Speakers



Chris Omland VP of Product Management



Jesus Bouzada Senior Product Manager



Aaron Robles Senior Product Manager



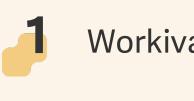
What brings you here today - Poll



What are you hoping to achieve by learning about Workiva APIs and Workiva Scripting?

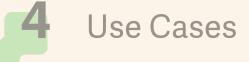
Answers are anonymous. Please provide an honest answer, it will not be used to decide your access to Scripting

- a. I've used Python and APIs before and I want to explore what the possibilities are with Workiva
- b. I have some ideas (use cases) of how to solve customers' challenges programmatically
- c. I am already using Workiva APIs for one or more use cases. This workshop will continue consolidating my understanding
- d. I am already using Workiva APIs to solve customers' challenges and I have even more ideas



Workiva Dev Platform





5 Addt'l Resources + Q&A

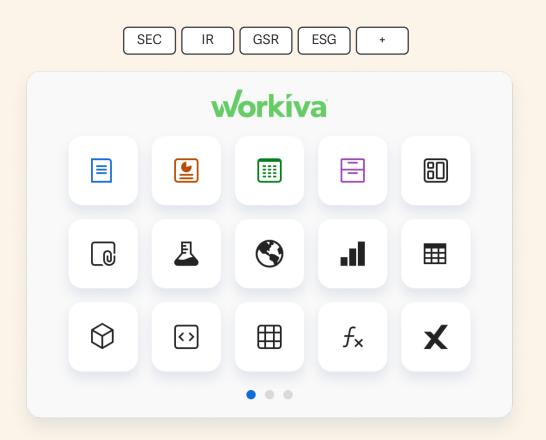


Workiva Scripting



The **developer platform** equips you to extend the value of our platform with new regulatory, financial, and ESG reporting solutions.

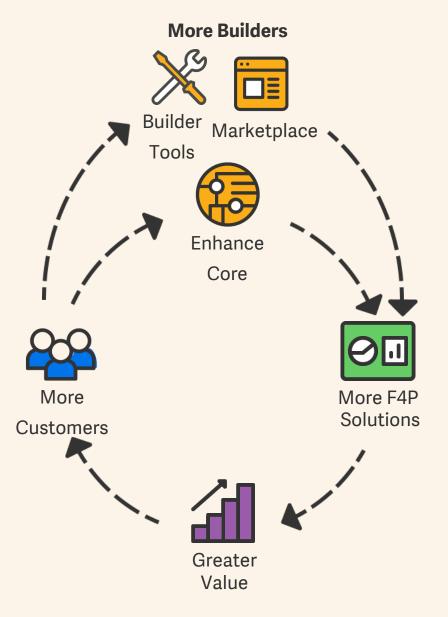


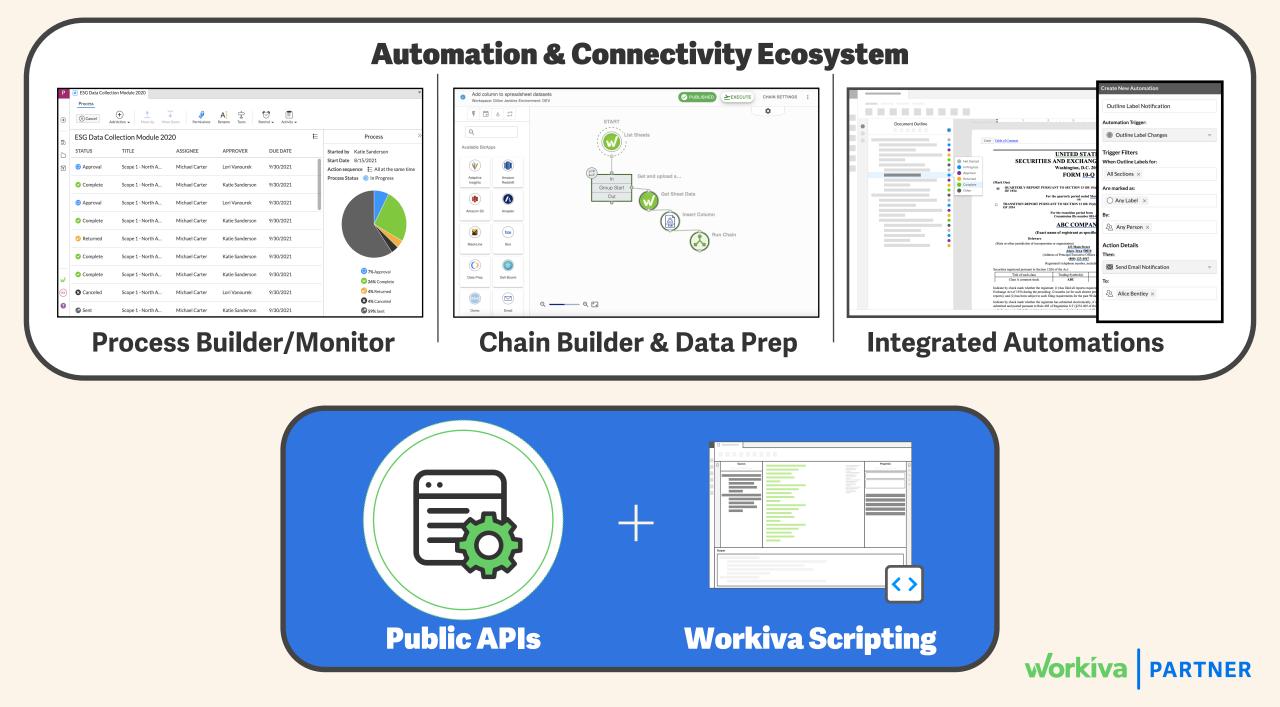


Solutions Platform

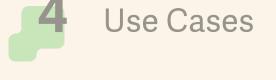


VI/ Our Growth Flywheel with Builders













Workiva Scripting



Platform APIs

Access to the core data & capabilities of Workiva



Processes

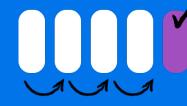
Test Forms

• Graph

- Task
- Files
- Documents
- Spreadsheets More!
- Presentations

Admin APIs

Automate the setup & administration of Workiva



• Groups

- Organizations Roles
- Workspaces
- Memberships
 Users

Industry Standard APIs

Leverage standards to work with existing systems



SCIM for Identity Management

wor

- Active Directory
- SailPoint
- Okta
- More!

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Workiva APIs >

ЖК

Q Search

Welcome to the Workiva Developer Hub_

Platform API

Interact with core components of the Workiva platform including Documents, Spreadsheets, Presentations, Graph, and Tasks

Admin API

Manage users, organizations, and workspaces within the Workiva Platform

Identity and Access Management (IAM) API

Securely create Workiva Developer API requests

Spreadsheets API

Import, update, and fetch data from Spreadsheets

Wdata API

Chains API

Connect, curate, and explore data within Wdata

Manage chain runs, and retrieve metadata about your workspace

Products and Solutions

Questions? 1.888.275.3125 Customer Support: 1.800.706.6526

Connect Automate Transform Wdesk

Wdata

Learn

Resource Library Workiva Blog Education Events

Company

Investor Relations Press Careers Locations Contact Us

Support **Getting Started** Help Community Services Customer Support

Generate credentials for the **specific Workiva Workspace** you want to interact

1. Click Add a grant

wdesk	Dashboard	Settings	People	Content	Permissions	Activities	Mobile Devices	Scripting Partr	er Workshop / Jesus Bouzada 🗸	Admin 🗸 ?
Members Groups	OAuth2 Gra	ants								
OAuth2 Grants		•								
Organization: Workiva Account Number: 3092536 Account Name: Scripting		qq	-							
+ Add a grant										
Name		ID	User			Scope		Expires	IP Whitelist	Actions
No items pund on this page										

Generate credentials for the **specific** Workiva Workspace you want to interact

- 1. Click Add a grant
- 2. Select the scopes required for the API you want to use (ex: Write Tasks scope to create a task)

JUMP TO

PLATFORM

Overview

API Details

Documen

Files

Graph

Tasks Retrieve a list of tasks Create a new task

Operation Presentations

Spreadsheets

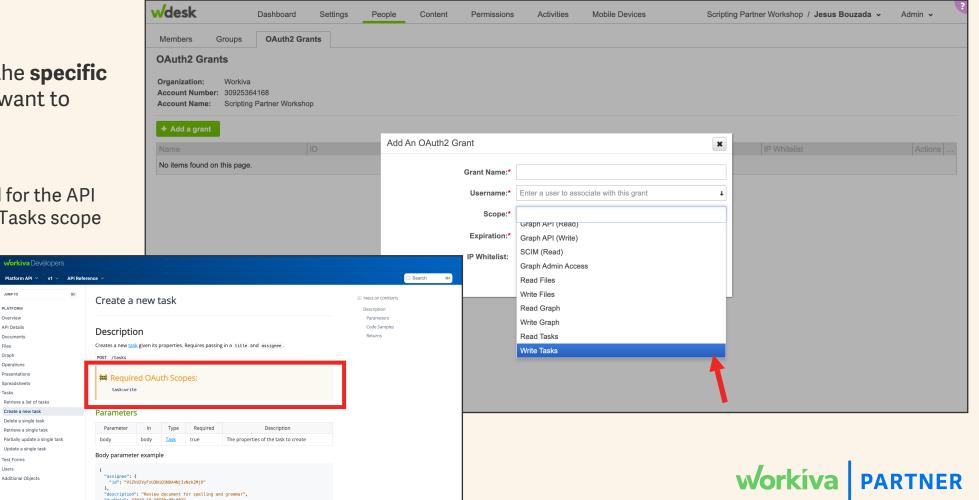
Delete a single task

Retrieve a single task

Update a single tas

Additional Objects

Test Forms Users



Generate credentials for the **specific Workiva Workspace** you want to interact

- 1. Click Add a grant
- 2. Select the scopes required for the API you want to use (ex: Write Tasks scope to create a task)
- 3. Create the Grant

desk		cople Content Permissio	ns Activities	Mobile Devices	Scriptin	g Partner Workshop	/ Jesus Bouzada 👻	Admin 🗸
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Name	* × ID	Client ID				itelist	Actions	
Jesus Grant	1138de6f9f7f46909eef1a4354192	Client Secret				_	Edit Reset Secr	ret 🝵 Delete
		Grant Name	* Jesus Grant		<	Enter a name tha identify this grant	t will help you	
		Username	* jesus.bouzada@wor	kiva.com	t	_		
		Scope	Write Tasks					
		Expiration	* 12/01/2023					
		IP Whitelist	:					
		*required		Save changes	Cancel			
2022 Workiva Privacy Polic	cy					Last	sign in: 8:13 AM Monday, I	November 28 Del



Generate credentials for the **specific Workiva Workspace** you want to interact

- 1. Click Add a grant
- 2. Select the scopes required for the API you want to use (ex: Write Tasks scope to create a task)
- 3. Create the Grant
- 4. Grab client id and client secret. **DO NOT SHARE**

	wdesk	Dashboard	Settings	People	Content	Permissions	Activities	Mobile Devi	ces	Scripting Partner Works	shop / Jesus Bouzada 🗸	Admin 🗸	?
	Members Groups	OAuth2 Gra	ants										
	OAuth2 Grants												
	Organization: Workiva Account Number: 3092536 Account Name: Scripting	4168 Partner Worksho	op										
	+ Add a grant												
	Name	× ID		Us			Scope		Expires	IP Whitelist	Actions		
	Jesus Grant	1138de6f9f7	7f46909eef1a43	54192983 Jes (jes	sus Bouzada sus.bouzada@w	orkiva.com)	Write Tasks		11/30/2023		Edit Reset Se	cret 🝵 Delete	
desk Members DAuth2 Gra Organization: Account Numbe Account Name + Add a grant Name Jesus Grant	Groups OAuth2 Grants nts Workiva rr: 30925364168 Scripting Partner Workshop	eef1a4354192	a Content	Permission Client ID: Client Secret: Grant Name: Username: Scope: Expiration: IP Whitelist:	 Usus Grant Jesus Borant Jesus bouzada Write Tasks 12/01/2023 	@workiva.com	R.	× itelist Enter		xtions Edit Reset Secret			
2022 Workiva P	rivacy Policy								Last sign in: 8:	13 AM Monday, November 28 I	Details		

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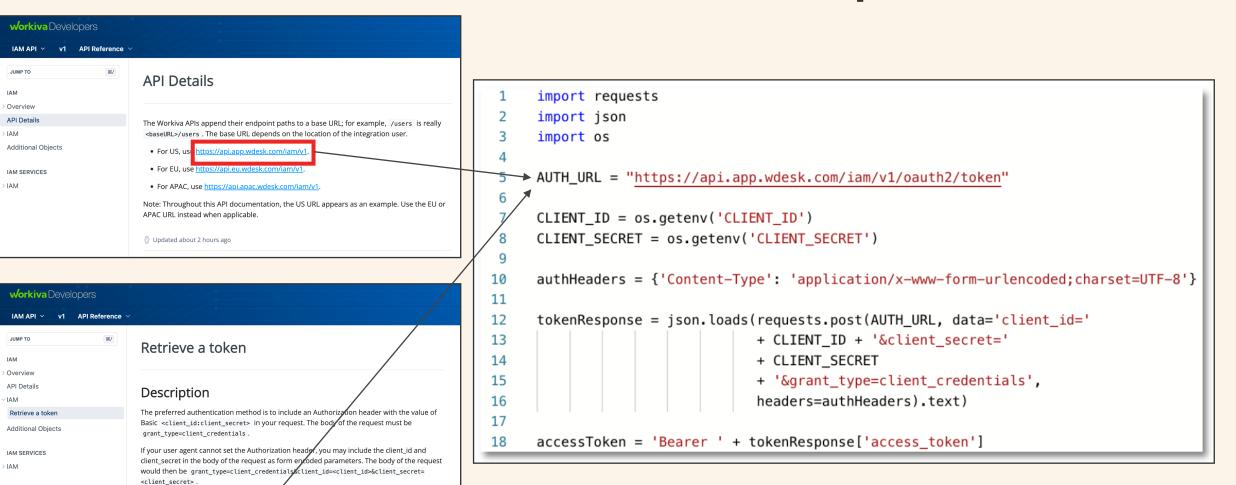
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16 17

Authorized APIs - Generate Creds import requests import json import os AUTH_URL = "https://api.app.wdesk.com/iam/v1/oauth2/token" CLIENT_ID = os.getenv('CLIENT_ID') CLIENT_SECRET = os.getenv('CLIENT_SECRET') authHeaders = {'Content-Type': 'application/x-www-form-urlencoded;charset=UTF-8'} tokenResponse = json.loads(requests.post(AUTH_URL, data='client_id=' + CLIENT_ID + '&client_secret=' + CLIENT_SECRET + '&grant_type=client_credentials', headers=authHeaders).text)

18 accessToken = 'Bearer ' + tokenResponse['access_token']



The client can optionally specify a scope parameter to limit the scope of the returned access token. In turn, the server uses a scope response parameter to inform the client of the scope of the actual access token issued. The actual scope returned may not match the scope

Subsequent requests to Workiva APIs are authorized using the bearer token

requested.

/oauth2/token

POST

IAM API V v1 API Referenc	
UMP TO (%)	API Details
Overview	
API Details	The Workiva APIs append their endpoint paths to a base URL; for example, /users is really
IAM	<baseurl>/users . The base URL depends on the location of the integration user.</baseurl>
Additional Objects	• For US, use https://api.app.wdesk.com/iam/v1 .
IAM SERVICES	• For EU, use https://api.eu.wdesk.com/iam/v1 .
IAM	 For APAC, use <u>https://api.apac.wdesk.com/iam/v1</u>.
	Note: Throughout this API documentation, the US URL appears as an example. Use the EU or APAC URL instead when applicable.
	O Updated about 2 hours ago

IAM API Y v1 API Reference	•
JUMP TO (1887)	Retrieve a token
Overview API Details / IAM	Description
Retrieve a token Additional Objects	The preferred authentication method is to include an Authorization header with the value of Basic <client_id:client_secret> in your request. The body of the request must be grant_type=client_credentials.</client_id:client_secret>
IAM SERVICES IAM	If your user agent cannot set the Authorization header, you may include the client_id and client_secret in the body of the request as form encoded parameters. The body of the request would then be grant_type=client_credentials&client_id= <client_id>&client_secret <client_secret> .</client_secret></client_id>
	The client can optionally specify a scope parameter to limit the scope of the returned <u>access</u> token. In turn, the server uses a scope response parameter to inform the client of the scope of the actual access token issued. The actual scope returned may not match the scope

1	import requests							
2	import json							
3	import os							
4								
5	AUTH_URL = "https://api.app.wdesk.com/iam/v1/oauth2/token"							
6								
7	CLIENT_ID = os.getenv('CLIENT_ID')							
8	CLIENT_SECRET = os.getenv('CLIENT_SECRET')							
9								
10	<pre>authHeaders = {'Content-Type': 'application/x-www-form-urlencoded;charset=UTF-8'}</pre>							
11								
12	<pre>tokenResponse = json.loads(requests.post(AUTH_URL, data='client_id='</pre>							
13	+ CLIENT_ID + '&client_secret='							
14	+ CLIENT_SECRET							
15	+ '&grant_type=client_credentials',							
16	headers=authHeaders).text)							
17								
18	<pre>accessToken = 'Bearer ' + tokenResponse['access_token']</pre>							

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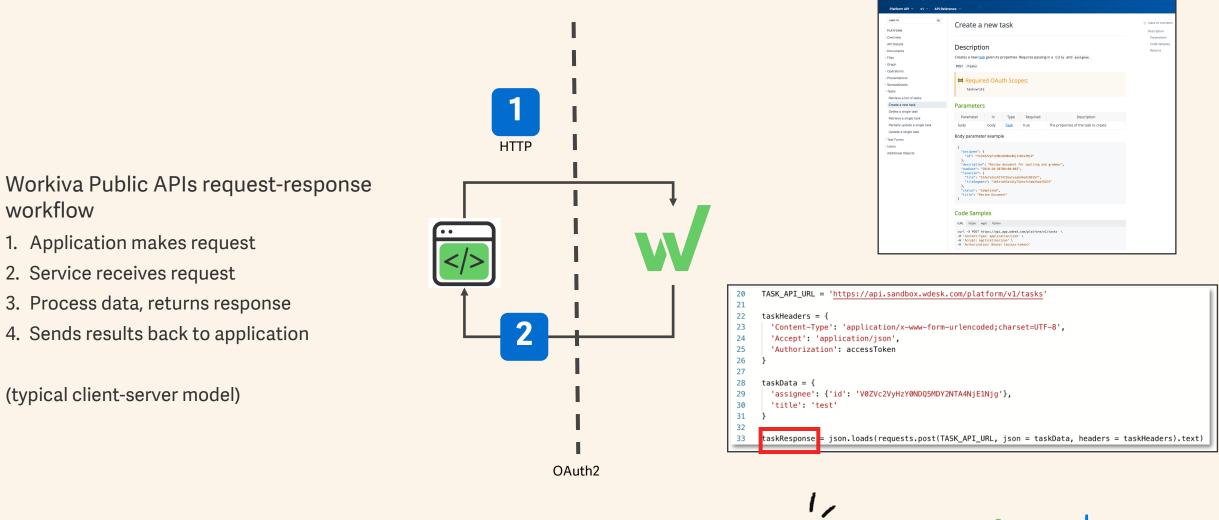
JUMP TO	API Details
IAM	AFTDetails
Overview	
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AM	<pre><baseurl>/users . The base URL depends on the location of the integration user.</baseurl></pre>
Additional Objects	• For US, use <u>https://api.app.wdesk.com/iam/v1</u> .
IAM SERVICES	 For EU, use <u>https://api.eu.wdesk.com/iam/v1</u>.
AM	 For APAC, use <u>https://api.apac.wdesk.com/iam/v1</u>.
	Note: Throughout this API documentation, the US URL appears as an example. Use the EU or APAC URL instead when applicable.

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IAM API 🖌 🛛 v1 🛛 API Reference 🗸	
JUMP TO (M)	Retrieve a token
> Overview API Details ~ IAM	Description
Retrieve a token Additional Objects	The preferred authentication method is to include an Authorization header with the value of Basic <client_id:client_secret> in your request. The body of the request must be grant_type=client_credentials .</client_id:client_secret>
IAM SERVICES > IAM	If your user agent cannot set the Authorization header, you may include the client_id and client_secret in the body of the request as form encoded parameters. The body of the request would then be grant_type=client_credentials&client_id= <client_id>&client_secret= <client_secret> .</client_secret></client_id>
	The client can optionally specify a scope parameter to limit the scope of the returned access token. In turn, the server uses a scope response parameter to inform the client of the scope of the actual access token issued. The actual scope returned may not match the scope requested. Subsequent requests to Workiva APIs are authorized using the bearer token.
	POST /oauth2/token

1	import requests
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3	
-	import os
4	
5	AUTH_URL = "https://api.app.wdesk.com/iam/v1/oauth2/token"
6	
7	CLIENT_ID = os.getenv('CLIENT_ID')
8	CLIENT_SECRET = os.getenv('CLIENT_SECRET')
9	
10	<pre>authHeaders = {'Content-Type': 'application/x-www-form-urlencoded;charset=UTF-8'}</pre>
11	
12	<pre>tokenResponse = json.loads(requests.post(AUTH_URL, data='client_id='</pre>
13	+ CLIENT_ID + '&client_secret='
14	+ CLIENT_SECRET
15	<pre>+ '&grant_type=client_credentials',</pre>
16	headers=authHeaders).text)
17	
18	accessToken = 'Bearer ' + tokenResponse['access_token']

https://developers.workiva.com/workiva-iam/reference/iam-tokenrequest

HTTP-based REST APIs



https://developers.workiva.com/workiva-platform/reference/platform-createtask *

Data Model

Resource or objects

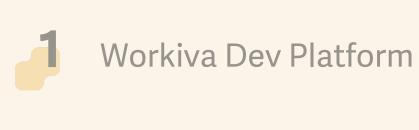
Things in the API you can interact with

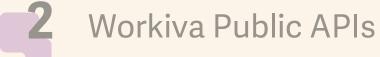
Examples: User, Task, Document, File, Process, etc...

"Give me all **users**" "Create a **task**" "Update **file** name"

workiva Developers											
Platform API V V1 V API Re	iference ~										
PLATFORM	Tasks										
> Overview											
API Details > Documents		isers to manage projec these endpoints to cre									
> Files > Graph	Task		JUMP TO (36/	Spread	dsheet	ts		E TABLE OF CONTENTS			
> Operations	Proportio		PLATFORM	'				Spreadsheet			
 > Presentations > Spreadsheets 	Propertie	:5	> Overview API Details					Properties Example			
~ Tasks	Name	Туре	> Documents			I to work with large, complex data in a familiar, collaborative, and endpoints to manage spreadsheets and their sheets in the Worki		SpreadsheetExport			
Retrieve a list of tasks	assignee	<u>User</u>	> Files	chinorment	. ose trese	enapoints to manage spreadsheets and their sheets in the work		Properties			
Create a new task	completed	Action	> Graph	Spread	sheet			Example			
Delete a single task			> Operations					SpreadsheetToPdfOptions			
Retrieve a single task	created	Action	> Presentations	Properti	es		Properties				
Partially update a single task Update a single task			~ Spreadsheets	Manag	Turne	Description	Destrictions	Example			
> Test Forms	description	string	Retrieve a list of spreadsheets	Name	Туре	Description	Restrictions	SpreadsheetToXIsxOptions Properties			
> Users	dueDate	string(date-time)	Retrieve a single spreadsheet	created	Action	When the action was performed, and details about the user who did it	read-only	Example			
Additional Objects	id	string	Retrieve a list of datasets Bulk upsert of datasets	id	string	The unique identifier of the spreadsheet	read-only	SpreadsheetToCsvOptions			
		TaskLocation null	Initiate a spreadsheet export		541116	When the action was performed, and details about the user		Properties			
	location		Retrieve a list of sheets	modified	Action	who did it	read-only	Example			
			Create a new sheet in a spreadsheet	name	string	The name of the spreadsheet	read-only	Sheet			
		A	Delete a single sheet		.0	An array of partial information about the sheets in this		Properties Example			
	modified	Action	Retrieve a single sheet	sheets	[Sheet]	spreadsheet. Optionally included in the response when the	read-only	SheetCopy			
	sourceUrl	string	Partially update a single sheet			\$expand query parameter is provided.		Properties			
			Update a single sheet	template	boolean	Whether the spreadsheet is a template	read-only	Example			
	status	string	Copy sheet					Dataset			
	alal -	atala a	Delete a single dataset	Example	e			Properties			
	title	string	Retrieve data from a sheet	ł				Example			
			Update sheet formatting	"created				Datasets Properties			
			Retrieve a list of range values	"dateT "user"		-10-30T15:03:27Z",		Example			
			Update values in a range		nlavName"	"string"		champie			

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5 Addt'l Resources + Q&A



Workiva Scripting



Scripting allows customers to meet unique needs by running custom code efficiently where they trust their data is secured

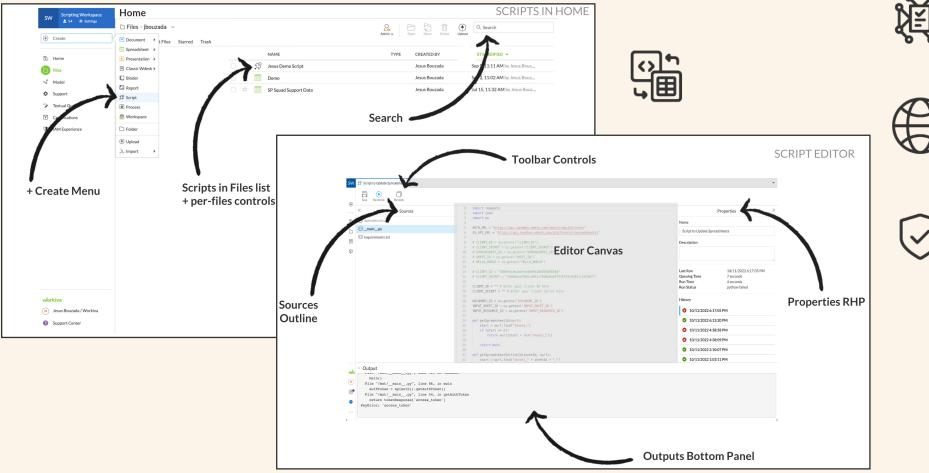


Workiva Scripting

Workiva Scripting <-



Available today through our Early Adopter Program



Create & Manage Python Scripts

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nvoke from chains & ntegrated Automations

Secure execution on the Workiva Platform

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Running Scripts

Runner Credentials



- <u>Generate Creds</u> (Scripting API)
- Scripting role (Editor/Viewer/ Runner)
- Script permissions





- Generate Creds
- Permissions to Workiva files

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Running Scripts with the Editor

Scripting Editor



- Used for the **dev-testing cycle**
- Enter input parameters on the screen
- Read inputs as environment variables in the code

🗊 Script to Update Spreadsheets										Ŧ	
Save Run Script Run Link			Run Parameters			×					
« Sources		1 import requests 2 import json	CLIENT_ID				Research Research Research Research		Pro	operties »	
D_mainpy		3 import os 4		Billion and a star	difference and		Sartin Tartin		Name		
@ requirements.txt		<pre>5 AUTH_URL = "https://api.a 6 SS_API_URL = 'https://api</pre>	CLIENT_SECRET				BUDY - BUDY - BUDY - BUDY -		Script to Update Spreadsh	eets	
dependencies.zip		<pre>7 8 CLIENT_ID = os.getenv('CL</pre>	SPREADSHEET_ID	352e1b500a5f4	19f5b55¢ ×				Description		
		9 CLIENT_SECRET = os.geten 10 SPREADSHEET_ID = os.geten 11 SHEET_ID = os.getenv('SHE	SHEET_ID	fdc0ed568c124	72f9d8d						
		12 HELLO_WORLD = os.getenv('	Please enter a key and value								
		14 class ApiAuth: 15 definit(self):	HELLO_WORLD	Holaaaaa	×				Last Run Queuing Time	10/11/2022 12:26:45 PM 7 seconds	
		16 selfheaders = 17 'application/x-we							Run Time	9 seconds	
		18 def getAuthToken(self 19 tokenRes = reques	+ Add Variable						Run Status	complete	
		20 '&client_secret=' 21 headers = selfh							History		
		22 tokenResponse = j 23 return tokenRespo				Cancel Run Script			10/11/2022 12:26:45		
		24 25 class SSApi:					J		10/11/2022 12:26:18	3 PM	
		26	_	_	_				0/11/2022 12:22:29	PPM	I
	SW	🧐 Script to Update Sprea	dsheets								•
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		🖂 dan sa dan sisa sin		3 import os							
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~ Output	\heartsuit	○ requirements.txt			8 SHEE	EADSHEET_ID = os.gete ET_ID = os.getenv('SH	EET_ID')	.)		Description	
building dependencies.zip from requir Target: /tmp/tmpschlridd					10	LO_WORLD = os.getenv('HELLO_WORLD')				
pip install: 0 zipfile -c: 0					11 12 def	main():					
						authToken = ApiAuth().getAuthToken()				
					14	<pre>ssApi = SSApi(authTo</pre>				Last Run	10/11/2022 6:17:05 PM
						write_tier_data(ssAp	i)			Queuing Time	7 seconds
					16 17 prin	nt('Calling main')				Run Time	4 seconds
					18 mair					Run Status	python-failed
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	W									8 10/11/202	2 6:1/:05 PM
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		Calling main Traceback (most r	ecent call loc	+) •							
					ov", line 1	197, in _run_modul	e as main				
						,					
			eturn _run_code(code, main_globals, None,								

Running Scripts from Workiva Files

Integrated Automations



- Ideal for non-tech customers
- Setup Scripting-based automations in Workiva files
- Manually run from the file
- Define your inputs in a companion spreadsheet

	SW	Running from Workiva Files		*	
		File Edit Data View Review Markup			
	٠	Publish Undo Redo Properties • Styles Text Formatting •	Formatting ▼]+[•
	\$	ц <u></u>	mations	≫	▲ ▶
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	\heartsuit	Section 1 Status: Active	Run	1	+ C 📮
		Jesus Bouzada on	Edit	× 0	Create new automation
<mark>] def</mark> getS∣	oreads	sheetId(wurl):…	Disable	•	* Running from Workiva Files
def getS	neetId	d(spreadsheetId, wurl):…	View activity		Automation trigger *
		ameters (inputs) when you run the Script from the ditor, a Chain, or directly from the Scripting API	Delete	(x)	• Manual Execution • • •
		<pre>s.getenv("CLIENT_ID") = os.getenv("CLIENT_SECRET")</pre>		\$	Action details
				(† 1)	Then *
inputs_s	oreads	ent_id = os.getenv("DOC_ID") sheet_id = os.getenv("SPREADSHEET_ID")			Select action \clubsuit
inputs_s	ieet_i	<pre>id = os.getenv("SHEET_ID")</pre>			☆ Execute script
# Overri	de inp	outs when you run the Script from an integrated automation			
ia_input:	s_spre	eadsheet_id = os.getenv("INPUT_SHEET_ID")			
if ia_in	outs_s	spreadsheet_id:			
# Ha	rdcode	e client id and client secret if triggered from Integrated Automation			
	_	= 'YOUR_CLIENT_ID' cret = 'YOUR_CLIENT_SECRET'	⊖ ⊕ 100% ▲	2	
trig	ger_do	<pre>ocument_id = os.getenv("DOCUMENT_ID")</pre>			Cancel
inpu	ts_spi	readsheet_id = getSpreadsheetId(ia_inputs_spreadsheet_id)			Q Q 100% A 2
		nt_id: id = getSheetId(document id, os.getenv("INPUT RESOURCE ID"))			

Running Scripts from Chains

Chains Connector

• Ideal to optimize your Chains

- Easily define your input parameters
- Leverage Chains' scheduling and monitoring

		SP Scripting Partner Worksh	Workspace Settings
SP Partner Workshop Workspace: Scripting Partner Workshop Er			Workspace Settings Runners Downloads BizApps Connections Security
		 Environments Chains 	Update Connection CLOSE SAVE DELETE
	START	P Templates	6 Uses
Q Workiva Scripting		➤ Monitor	Workiva Scripting
	Run Script	=, Approvals	
Available BizApps		Schedules	Connection created - cannot select BizApp Runners*
	-0	- Connections	CloudRunner 📀 👻
		Resources	Basic Info
Service Workiva			Provide a unique name and description for your connection
Scripting		Data Prep	Name*
Chain Events			Workiva Scripting
			Description
Partner Workshop Workspace: Scripting Partner Workshop Environment: DEV	🔁 PUBLISH 🔛 EXECUTE CHAIN SETTI	、 、	Description
	· · · · · · · · · · · · · · · · · · ·	•	(I) Resources
€ Q Search	Edit Run Script Workiva Scripting - DELETE CANCEL		Select resources to associate to your connection. They will be automatically encrypted upon save.
	Run Script		ачто.
Select a variable	Script ID	-	
🛄 Runtime 🗸 🗸	41543d1c-8445-417e-bf3a-9fb7954cb21c The ID of the script that will be run.	-	Δ
Chain ^	The D of the scipit that will be full.		Click or drag to upload files
	Script Environment Variables <>		L
	Optional: Custom values provided to the running process.		Properties
≓ ∕	Environment Variable		Input fields relevant to your connection
3			- Client ID*
• -		-	The randomly generated ID in your OAuth2 Grant that is used to identify the integration user
Û	$= \underbrace{\text{CLIENT_ID}} \leftrightarrow \underbrace{\text{CLIENT_ID}} \leftrightarrow$	-	Client Secret*
	Key Value	-	
	= CLIENT_SECRET ↔ ← CLIENT_SECRET ↔		The randomly generated Secret in your OAuth2 Grant that is used to authenticate the integration user
			Scripting Server API https://h.sandbox.wdesk.com/
9	Polling Frequency	wdata chains	OPTIONAL: Use this field to override the URL host and base path for the Scripting Server API when running
0	10	Jesus Bouzada	in test environments
		Support Center	IAM Host Override https://api.sandbox.wdesk.com/iam/v1/oauth2/token
			ODTIONAL Use this field to supplie the UDL heat and hear with far the IAM ADL days supplies to test

Running Scripts with the Scripting API

Scripting API



- Ideal to integrate with 3rd
 party systems
- Send input parameters with the body of the request
- Use specific endpoints to check status and get output

POST /v0/se	cripts/{scri	.ptId}/runs Create	e a new run Create	Run 🔨 🔒	Find more details	
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Qualification Criteria

Scripting Guiding Principles

The purpose of this document is to outline the qualifications and skills a partner must demonstrate in order to enable scripting functionality in their account prior to the partner taking on any implementations that may include scripting.

Partner Must Provide:

- Names of resource(s) and Python experience
- Contingency plan if that/those resources leave the firm
- Plan to certify/train more than one resource (MSFT: Your company must have 2 individuals meet requirements)
- Plan for long term support to end client once implementation is complete

Qualification Criteria/Requirements

- Workiva Platform certification
- Intro courses (informal training in Ignite)
 - Workiva Public APIs
 - Scripting
- Python skill level (beginner, intermediate, advanced, expert)
 - Beginner required (certifications: <u>PCEP</u> or <u>MSFT 98-381</u>)
 - Intermediate recommended (certification: <u>PCAP</u>)
 - <u>Certification</u> can be waived by providing
 - Proof of online Python certification through third party
 - Technical BE or Masters with dev courses
 - Other (ex: Portfolio, publications...)
 - Understanding of REST APIs and Python Requests library recommended (<u>Udemy course</u>, <u>Coursera</u>)
- Assignment to build a script using Workiva APIs based on real use cases (ex: Zero Suppression, Dynamic Table Creation, wdata? graph?)

Early Adopter Expectations

- Provide feedback to product team on a quarterly basis
- Provide biweekly project deployment status updates
- Must participate in pipeline review to identify opportunities to align scripting product/project fit
- Allow for Workiva to complete a build review of any completed projects that include scripting, or any proof of concept builds

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- Plan to certify/train more than one resource
- Workiva Platform certification
- Workiva Public APIs and Scripting training (Learning Hub)
- Intermediate Python skills (PCAP)
- Understanding of REST APIs



Qualification Criteria - Poll



How do you rate yourself as a Python and APIs developer?

Answers are anonymous. Please provide an honest answer, it will not be used to decide your access to Scripting

- a. I am new to Python and APIs
- b. I have done some courses but not really used them in projects
- c. I have experience with Python and APIs in projects, but not with Workiva APIs
- d. I have experience with Python and Workiva APIs in projects



Early Adopter Program

Welcome to Workiva Scripting Early Adopter Program

The purpose of this document is two-fold:

- 1. Clarify expectations of the Early Adopter Program
- 2. Help onboard into the Early Adopter version of Workiva Scripting

Objective

The goal of this program is to give trusted customers - like you - early access to Scripting. Try it out internally, build scripts, and provide feedback.

Benefits & Expectations

What you get by participating:

- Early, no-cost access to
 Workiva Scripting Editor available to cre
- Workiva Scripting Editor available to create and test scripts in your workspace of choice
- $^\circ$ $\,$ The ability to run script-based automations from Chains from any workspace where Chains is enabled
- Input on the product roadmap and feature prioritization
- Ongoing dedicated support from the Workiva Scripting product team (during 9-5 Central Standard Time)
- Consistent and frequent communication throughout the Early Adopter Program
- To ensure mutual value is achieved, we ask participants the following:
- Staff this project with people with programming experience, ideally Python
- Build and run scripts using Workiva Scripting, beginning with the use of our accelerator template.
- Provide feedback on your experience, and describe the value you and your customers obtain with Workiva Scripting.
- Consult with Workiva for approval before releasing scripts to customers via Workiva Scripting.

Dates & Duration

The program is expected to run the first three quarters of 2022. We will keep you updated with the next steps and timelines.

Success Criteria

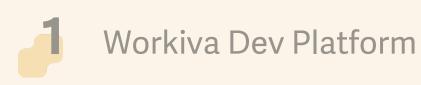
The Early Adopter Program's success depends on whether you and other participants find Workiva Scripting so valuable that you become reference customers for Workiva and share your experience with others.

Workiva Confidential Information

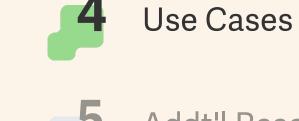
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- Our **goal** is to use your feedback to make Scripting even more valuable
- **Benefit** from early access to Scripting at no cost
- At the end of the program, Scripting will be **available for an additional price**
- **Success** if you become reference and share your experience with others
- You meet the qualification criteria











Workiva Scripting



Zero Suppression

!!! The Challenge

Our customers leverage the Workiva GSR solution for hundreds of entities around the globe. They create documents with linked tables that often end up with rows with empty data due to the entity. These empty rows are not relevant and must be hidden in each entity document.

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Title Page			
Table of Contents		Year ended D	,
Directors' Statement		Year ended December 31,	Year ended December 31,
Independent Auditor's Report		2020	2021
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 Financial statements 			
Statement of Cash Flows	Cash and cash equivalents, beginning of year OPERATING ACTIVITIES:	36,807,182	801,187
Statement of Comprehensive Income	Net loss	(21,234,689)	(34,830,929)
Balance sheet	Adjustments to reconcile net loss to net cash from operating activities:	(11,254,005)	(34,030,525)
Statement of Stockholder's Equity	Depreciation and amortization of property and equipment and other	457,582	4,654,507
	Stock-based compensation	37,715,306	58,902,281
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	Inventories	_	
For Mexico only - Profit sharing	Amounts due from / to related parties, net	(66,768,124)	184,246,704
✓ NR Policies	Accounts receivable, net and other	(970,802)	(208,169,905)
1.35 - Retrospective restatement of errors	Prepayments	296,761	(242,358)
1.36 - Change of functional currency	Accounts payable	2,578,871	(105,428)
1.37 - Acquisitions goodwill and acquired intangi	Accrued expenses and other	15,022,810	44 248 897
1.38 - Change in accounting policy	Provisions	-	-
	Unearned revenue	(34,813)	13,003,867
1.39 - First time adoption of standard	Other assets	-	(829,698)
 Notes to the Financial Statements 	Other liabilities Dividends received	-	
2 - Net Sales	Dividends received Cash received for interest	63,503	- 83,593
 3 - Administrative expenses 	Cash paid for interest	63,503	(593)
	Cash paid for income taxes	(2,684,240)	(5,370,247)
For Brazil only	Net cash provided by (used in) operating activities	(35,650,552)	55,780,232
Auditors' remuneration		,	

Before

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After

Zero Suppression

Prior to Scripting / APIs

Process

- Manually open each document
- Scroll through document and find tables
- Unhide rows in each table
- Hide rows in each table (filter or manual selection)
- Hide rows in each document takes roughly 10-15 minutes (times 400)

Impacts

- Numerous hours of manual work
- Error prone
- Scalability concerns

With Scripting & APIs

Process

- Few hours of work to create reusable script
- Script can be run via chain or as needed
- Automatically scans documents and formats tables
- Hiding rows in all 400 documents done in minutes

Impacts

- Small investment to save countless hours
- Provides a scalable path to more entities
- Can be customized for other unique needs (i.e. logic on which rows to hide)
- Portable

770 rows automatically hidden, just one report out of 400

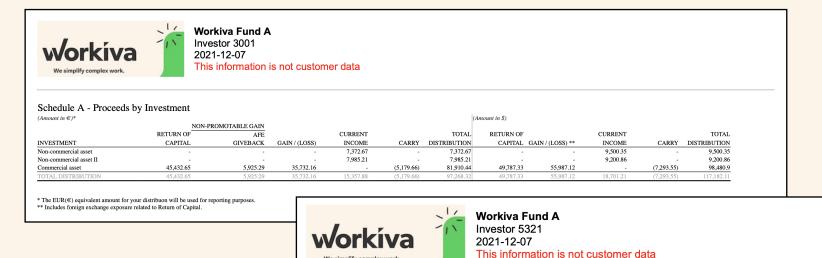
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Investor Correspondence

11 The Challenge

Large financial service firms need to report to investors on a regular basis, this largely is the generation of hundreds to thousands of documents that match a template but fill in data specific to the investor



Schedule A - Proceeds by Investment

(Amount in \in)

We simplify complex work

	RETURN OF	AFE			CURRENT			TOTAL
INVESTMENT	CAPITAL	GIVEBACK RECO	UPED LOSS	GAIN / (LOSS)	INCOME	CARRY	WITHHOLDING	DISTRIBUTION
Commercial asset	29,458.33	5,004.09	5.0	18,444.12	-	(4,321.09)	5.0	48,595.45
Non-commercial asset II	-	-	-	-	5,535.05	-	-	5,535.05
Non-commercial asset	-	-	-	-	5,378.77	-	-	5,378.77
TOTAL DISTRIBUTION	29,458.33	5,004.09	5.0	18,444.12	10,913.82	(4,321.09)	5.0	59,509.27



Investor Correspondence

Prior to Scripting / APIs

Process

- Manually create each document
- Identify investor needs and populate content and apply format accordingly
- Manually export each document
- Distribute each document
- A chain cannot be used to meet formatting and speed requirements

Impacts

- Large financial institutions would look for alternatives to Workiva's solutions
- Error prone
- Scalability concerns

With Scripting & APIs

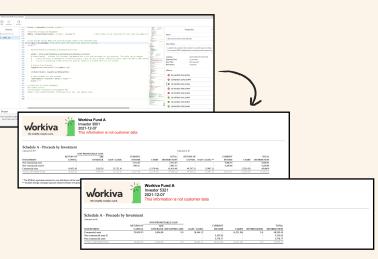
Process

- A power user with Python experience can create custom logic to automate the process
- The unique needs of each investor are specified in a spreadsheet that serves as a control dashboard
- Script is run via chain or from a workiva file
- Generation of documents and data population automated with a click of a button

Impacts

- Attract large financial institutions
- Removed hundreds of hours of manual work
- Portable

400 pdf reports generated and distributed within minutes



Workíva PARTNER

Onboarding At Scale

!!! The Challenge

When it comes to onboarding, there is a significant amount of manual effort involved to support the creation of, not just one, but sometimes hundreds of organizations and workspaces, and potentially thousands of users. This is very common with Managed Service Providers (MSPs) partners.

Create New Organization					
Organization Name *					
Organization 1	~				
Salesforce ID *					
Salesforce ID					
		← → C ■ h.wk-dev.we	desk.org/s/admin/o/4fa487f8-32d5-4f40-ad2a-ab2	bbd13a32d/orgs/orgs/orgs	
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		C Security	-scripting-1	000000000	
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		Partners	-scripting-12		
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			-scripting-19		
			-scripting-2		
			-scripting-22		
			-scripting-24		
			-scripting-26		
			-scripting-27		



Onboarding At Scale

Prior to Scripting / APIs

Process

- Manually create each organization
- Manually create each workspace
- Manually assign each user to an organization and to a workspace
- Manually assign each user a role in each workspace

Impacts

- Numerous hours of manual work
- Error prone
- Dramatic increase in time from contract to onboard

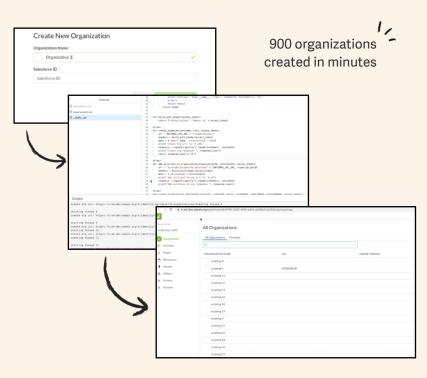
With Scripting & APIs

Process

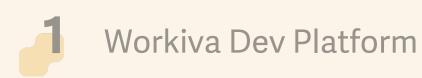
- Customer provides the number of organizations and workspaces required as well as list of users and roles per workspace
- Few hours of work to create reusable script
- Use of a SuperAdmin token in production to run the script with necessary privileges

Impacts

- Significant reduction in onboarding time for MSPs
- Ability to break the script down into single transaction (e.g. add user to workspace with role) to automate individual processes for other clients

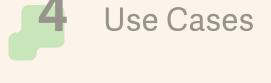


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Workiva Public APIs







Workiva Scripting



Other Training Opportunities with Workiva



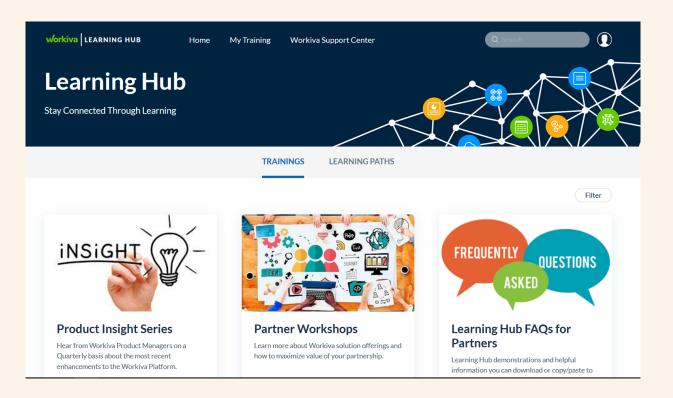
Learning Paths on Training tab

- Workiva Essentials
- Workiva Public APIs (soon)
- Workiva Scripting (soon)



Trainings on Training tab

- Partner Workshops
- Product Insights



work

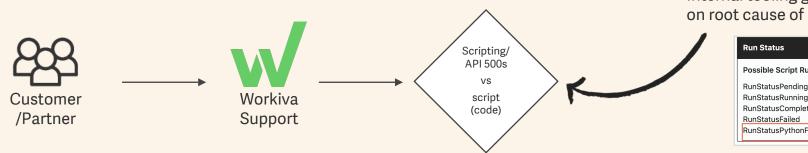
PARTNER

(Workiva Public APIs and Workiva Scripting products)

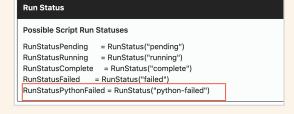




(Workiva Public APIs and Workiva Scripting products)

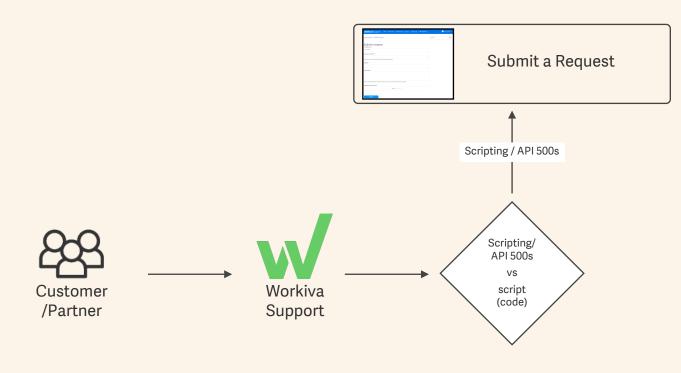


Internal tooling guides Workiva Customer Support on root cause of issue





(Workiva Public APIs and Workiva Scripting products)

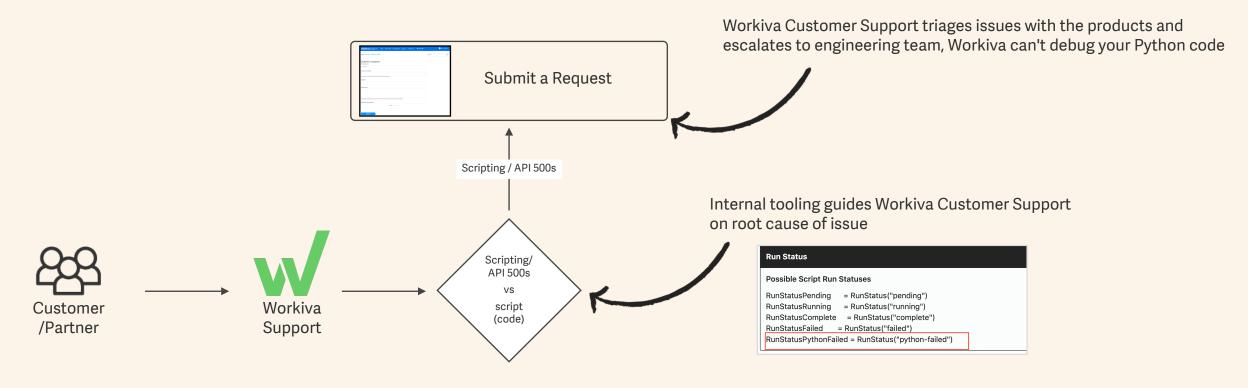


Workíva Support не	p Community	Learning Hub	Support ~	Resources ~	🔇 Language 🗸	😑 Jesus Bouzada ~
Support Center > Submit a request						Search Q
Submit a request ^{CC (optional)}						
Add emails						
How can we help?*						
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Please let us know how we can assist from the drop-	down menu above.					
Subject*						
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	Add fil	e or drop files here				
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workiva

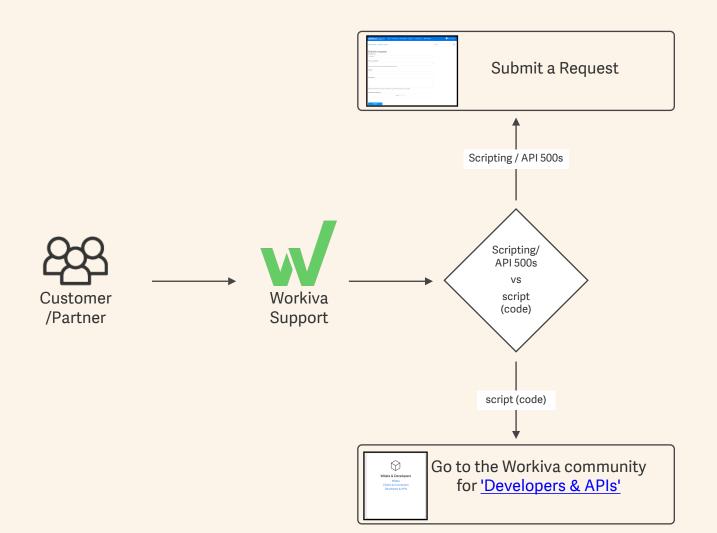
PARTNER

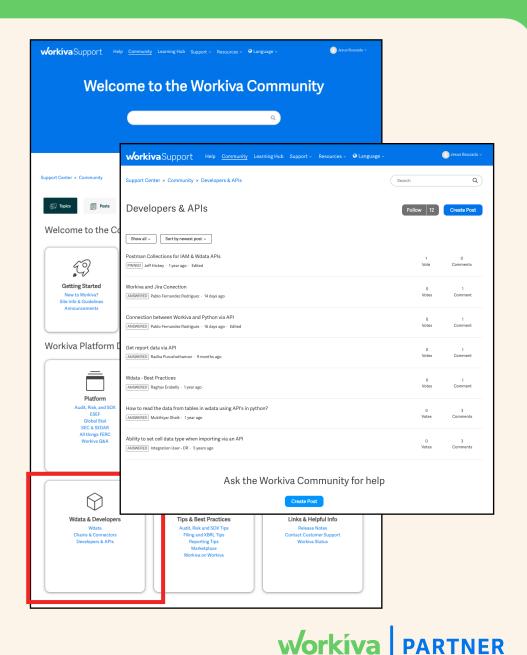
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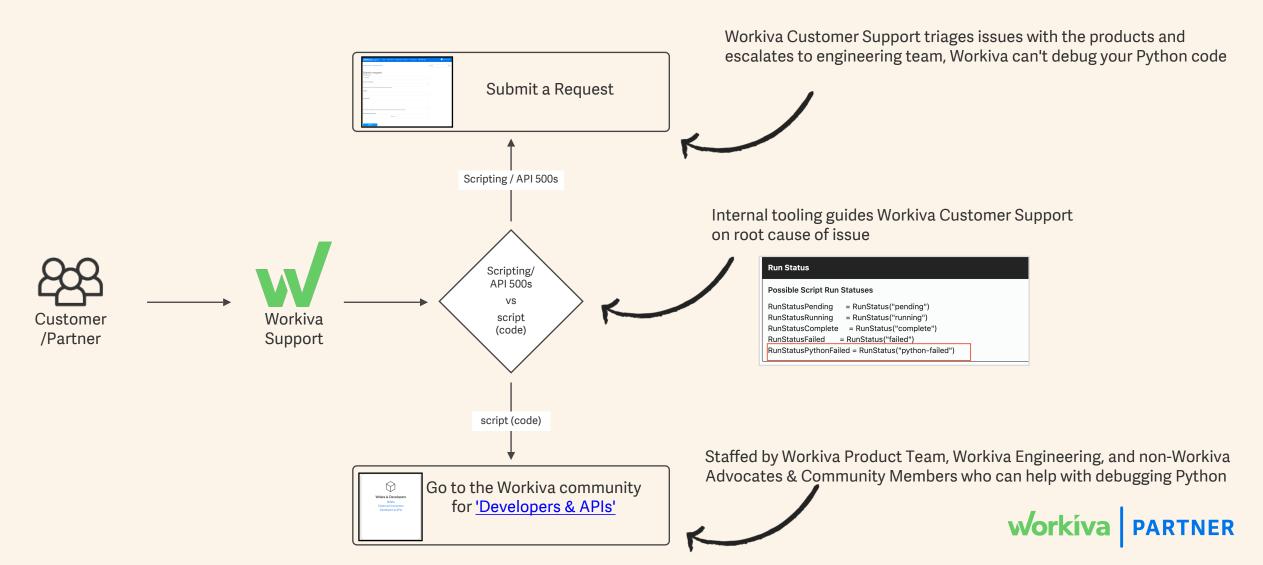
Workíva PARTNER

(Workiva Public APIs and Workiva Scripting products)





(Workiva Public APIs and Workiva Scripting products)



A Ton of Coding Resources



Certifications

- <u>PCEP Certified Entry-Level Python Programmer</u> (Python Institute)
- <u>Exam 98-381: Introduction to Programming Using Python</u> (Microsoft, entry-level)
- <u>PCAP Certified Associate in Python Programming</u> (Python Institute)



Courses

- Learn to Program: The Fundamentals (Coursera)
- Learn to Program: Crafting Quality Code (Coursera)



Blogs

- <u>Python and REST APIs: Interacting With Web Services</u> (Real Python)
- How to use an API with Python (Beginner's Guide)

=|

Dive into Python 3



Books

Python community at Stack overflow



Workiva APIs and Scripting, how valuable to you - Poll



Based on what you learned today, how likely are you to recommend Workiva APIs and Workiva Scripting?

Answers are anonymous. Please provide an honest answer, it will not be used to decide your access to Scripting

- 1. I still don't understand these capabilities
- 2. Very Unlikely
- 3. Unlikely
- 4. Likely
- 5. Very Likely

