

Design & Build ESG Base Template Connections

As work continues throughout the design and build stages of the ESG based template, we find it helpful to ensure that the customer team and the implementation team is grounded on the incoming and outgoing connections that flow and are part of the base model in order to ensure that a customer has best possible build experience but is also leveraging the functionality of the solution and the Workiva platform to its maximum. Highlighted here is a high level overview of the incoming connections that would be set up as part of the original base template solution import to the customer account as well as the outgoing connections that would be established as part of that design and build process to the data collection WData table. We find it helpful to socialize and share with the customer the support information around connecting sheets to destination WData tables. As this is part of the key functionality that has leveraged by the ESG solution as well as establishing incoming connections. Two spreadsheets pushing through the results of Wdata queries. Both of these topics are highlighted in our support site and they also explain and outlined the steps of how one would go about establishing an incoming connection, selecting a Wdata query, selecting that query to populate within the spreadsheet and then later subsequently, we can refresh both incoming and outgoing connections. As new data is available as new data is inputted and content generated within the data collection process. We'll highlight here that the mapping collection query floats to the mapping dropdown sections. This is a part of the ESG data collection spreadsheet and then any template that set up across the variety of topics that a customer would be collecting data that flat file would then be connected as an outgoing connection to the Wdata table. We can highlight this here by taking a look at our overlay flat file that we've previously covered on some of the other discovery sessions and videos. Where we'll notice there was an outgoing connection to the data collection table in Wdata table.

We also highlight that other sections that are being used to capture as an example potentially emission information and the corresponding flat file that would live under that entry overlay sheet. That flat file also has an outgoing data collection too the table in Wdata. The mapping dropdowns incoming connection is important as this incoming connection allows us to organize the information that is being inputted into our corresponding topic section and disclosures as an example, this mapping drop down section would be the one that is referenced when we navigate to a topic in a data collection flat file if I select edit will see the reference that the match being dropped down to our for that first column Across A2 to A. which should automatically ensure that all the ranges captured even if there was an update to the TSDs. We can see the results and also the design of the mapping collection query by navigating to Wdata. We don't foresee that a customer would be necessarily changing these aspects other than potentially adjusting the year parameter if there were potentially different versions of a framework that we're captured across different year revisions. What we'll see here is a population of results that will provide a unique identifier for both a topic, section, disclosure with those results and being able to be populated directly to the spreadsheet as well as different points of consumption that would also be inclusive of the fact. As we updated the filter parameter to 2021 and refresh, the query will notice the same set of mapping collection information that is available and establishing the mapping drop down section in our corresponding data collection spreadsheet. Another area that is helpful to have a good understanding and explanation to the customer are the incoming connections that flow to the factbook. The fact book does have the most amount of incoming connections to the spreadsheet which later consumed content or content station performance or disclosure tables being shared out to their final destinations via traditional Workiva destination links. In these incoming connections we'll see the list query, the same mapping collection, the ESG primary query, and the ESG framework mapping summary with a core requirement of the list query and the primary query which is the data output to ensure a viable functionality of the factbook as these will ultimately be the data feeds that will allow us

to stage data, select data from the data validation to see this content. If we navigate to our factbook will recognize here are connections for both list query data collection, the data output and also the framework mapping summary. We'll focus primarily on the list query results as this is the query that organizes the data in terms of a unique identify their for the selections that were made across the topic section and disclosure in the data collection. This is also organized by the similar breakout and also lists out the specific tags. We'll see corresponding either GRI codes and or SASB, SDG, TCFD and CDP codes if the topic section and disclosure that was selected highlighted those relationships.

In case a team is curious what would be the relationships articulated across the different frameworks and standards the framework summary query is designed and connected for this purpose. We currently find ourselves here in the framework items, spreadsheet and we are navigating our framework summary. If we were to filter down only to social, we would then begin to see what would be the relationships across those item levels across the different standards and frameworks. If we navigate to a sample topic section and disclosure that we've tagged data for our data collection, flat file, our social local and communities, we find that for (413-2) are related to this set of SASB item level codes that could then later be selected within the fact book to populate the corresponding figure fields in preparation for a SASB disclosure. And this brings us back to our connection template as we highlight the function of the list query to essentially organize that data entry with its tags and two unique identifiers and then as well followed by the data output section. The data output section of the factbook is the section that is the repository of those numerical values. The text entries, the comments associated across the different topics that have been collected in the data collection. We'll see the list out of the tags in addition to the topic section and disclosure that live in one column as well as a provider and most importantly the value that will be looked up by the section in the factbook. I can further filter down if I wanted for example to look at my tagged year to date data. As well if I only wanted to look at my GRI data. This is not minimizing the data that's actually within the data output section but is a quick review to confirm that I am indeed seeing all of the data I'm expecting in my value fields as they relate to the entries that I've selected for my specific topic section and disclosure but also my choices at the item level grouping in this example for GRI. Whenever I go to the factbook and make a selection of the data validation drop down. This data validation drop down is being fed by the list query in order to provide this unique identifier that has organized my data. And then the responses that have been captured by the data validation are looked up via our look up reference formula here structured in index match and also has some if nested in case their values that need to be aggregated further and look directly at data output to return those values. And finally as we provide an overview of the framework items spreadsheet, the spreadsheet houses the road level mapping of their respective frameworks organized into topics section and disclosure levels that allow our initial point of view of relationships across the frameworks and standards as we review what is in scope for the project delivery. If a customer is aligning to all four frameworks and standards and also CDP questionnaire information, we would establish outgoing connections to the dimension table titled framework items. If a customer was only aligning to GRI and SASB we would only establish these two outgoing connections and would leave SDG, CDP and TCFD not connected or even inclusively fully cleaned up from this framework items sheet. We find it helpful to ensure that a customer interacts and sees only that which is relevant for their process and we'll set up the team for an easier handoff across both the enablement go live and hand off sessions to the customer team.