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Learning Path - Configuring the ESG Base Solution

Stage 2

Discovery Phase

Deliverable: Project Kickoff & High Level Discovery

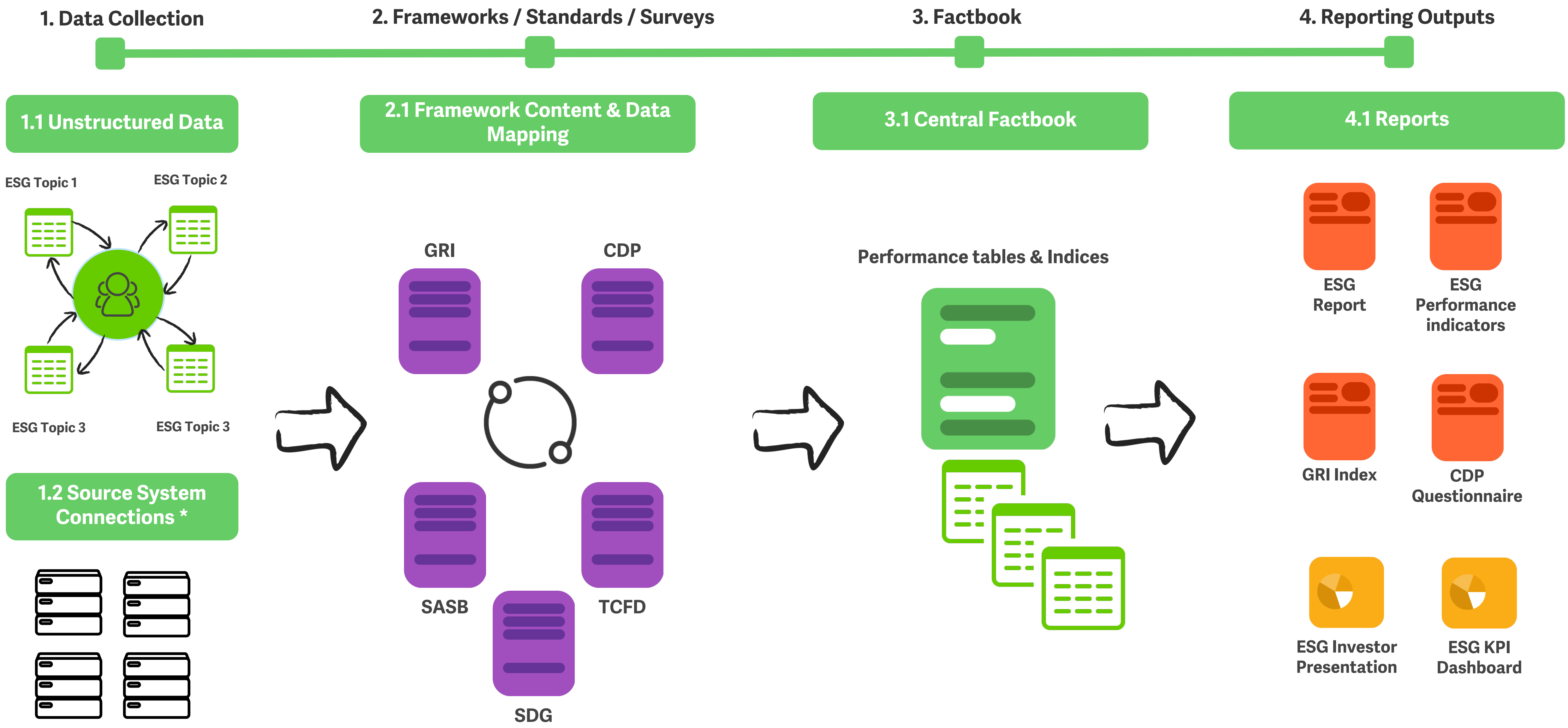
Deliverable Description:

Project launch meeting with the customer to align on scope, timelines & multiple discovery sessions.

Recommendations:

- Target the go-live date for when the client will need to run their new process. Push for realistic deadlines — when will the client's process actually need the build?
- Confirm the pain points and nuances from the scoping team sync, request source data and existing reports.
- Determine whether technical / integration resources need to be engaged from the client.
- Identify early provisioning requirements of Data Providers and Approvers for Data Collections

ESG Project Workstreams & Platform Deliverables



Names of reports. frameworks, questionnaires and standards above are examples and not representative of the scope of the project.
** Not a requirement for Phases 1 - 4 & Delivery*

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High Level Onboarding Plan

Client Current State

Unstructured data sources

- Email
- Excel
- Sharepoint

Structured data sources

- What structured data sources will be used? (e.g. Workday, ADP)

Data providers

- Number of Data Providers
- Consolidated or granular data?

Standard / Frameworks / Surveys

- GRI-SASB-TCFD-SDG-CDP
- Others Provided by Client

Reports

- What reports will be part of implementation? (e.g. ESG report, presentations, surveys)

Phases

Phase 1: Align

Establish consistency in expectations according to the statement of work, timelines and objectives.

Phase 2: Discover

Thoroughly understand the current process, requirements, controls and data systems involved.

Phase 3: Design

Develop, recommend, and establish a scalable process that meets the customers needs and is aligned with Workiva best practices.

Phase 4: Build

Replicate and test the designed solution in accordance with the Statement of Work.

Phase 5: Enable

Provide documentation, and training allowing the client ESG team to successfully maintain and iterate off of the delivered solution.

Go-Live

Project hand-off and onboarding services completion.

Project Deliverables

Platform Deliverables

1. **Data Collection**
   - Data collection sheets
   - Data collection process
2. **Frameworks / Standards / Surveys**
   - Framework/survey indicators
   - Framework/survey mapping
3. **Factbook**
   - Framework indices
   - Key data points for reporting
4. **Reporting Outputs**
   - ESG Report

Training & Documentation

- Core ESG team training
- Data provider training
- Data model documentation

Project Management

- Status updates and meetings

High Level Onboarding Plan

Client Current State

Unstructured data sources

- Email
- Excel
- Manual update

Structured data sources

- Power BI
- Enablon

Data providers

- Business unit level
- Consolidated collection

Frameworks / Surveys

- GRI
- CDP Climate / CDP Water
- UN SDG
- DJSI/DJSE
- Ecovadis
- Video Eiris

Reports

- URD Document
- CDP Climate / CDP Water
- DJSI Questionnaire
- GRI Index

Phase 1: Align

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Thoroughly understand the current process, requirements, controls and data systems involved.

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1. Data Collection
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- Data collection process

2. Frameworks / Standards / Surveys
- Framework/survey indicators
- Framework/survey mapping

3. Factbook
- Framework indices
- Key data points for reporting

4. Reporting Outputs
- CDP Climate / CDP Water
- GRI Index
- URD Chapter 4
- Annual/Quarterly KPI Dashboard

Training & Documentation
- Core ESG team training
- Data provider training
- Data model documentation

Solution Adoption
- Sign-off on the solution adoption by Team

Project Management
- Partner resourcing
- Status updates and meetings

Demo: High Level End-to-End Data Flow

Key Build Activities and Responsibilities

1. Data Collection	2. Frameworks / Standards / Surveys	3. Factbook	4. Reporting Outputs
Partner			

• Data collection discovery
• Import data collection templates and tailor to client specification
• Assign data owners and reviewers
• Set up permission structure
• Provide data collection training
	• Framework discovery
	• Set up in scope frameworks
	• Set up metrics / indicators
	• Assign permissions
	• Set up disclosure level mapping to data collection sheets
	• Provide framework management training
		• Set up factbook with relevant data points for reporting outputs
		  ◦ Frameworks Indices
		  ◦ Survey structures
		  ◦ Performance data tables
		• Provide factbook training
			• Set up in scope reporting outputs
			• Configure report layout and import style guide
			• Assign preparers and reviewers
			• Establish data linkages from factbook to reports
			• Provide report training
			• Submit Doc set-up if needed

Estimated hours: 20-30	Estimated hours: 10-20	Estimated hours: 5-10	Estimated hours: 5-10
Client			
• Provide relevant data points, mapping, existing collection sheets, data reports from systems • Provide roles/ responsibilities • Provide conversion calculations • Validate design and build • Assign permissions to end-users	• Provide summary of ESG frameworks, relevant data points • Provide framework mapping guidance • Provide roles/ responsibilities • Validate design and build • Assign permissions to end-users	• Provide relevant data tables for presentation in reports • Provide existing framework / survey presentations • Validate design and build • Assign permissions to end-users	• Provide existing reports in editable format (.docx) • Provide brand guidelines in form of style sheet/guide • Validate design and build

Discovery Session - ESG Report Outputs

Customer Report lead:

Provide the relevant source documentation and files for output reports, such as the prior year's versions of the report in an editable format (i.e. DocX), brand guidelines, and style guide.

Recommendations:

- Discuss and agree on output report setup approach | Customer Report lead
- Discuss and agree on Design needs, InDesign process - Call with Design Agency
- Update planning in draft project plan to reflect agreed on approach
- Discuss other outputs inclusive of ESG Presentation / KPIs / Investor Decks

ESG Content Sample

ESG Content that has its final design outside Workiva

i.e. export to ICML

Recognizing that the pandemic placed unanticipated demands on our employees, we also launched initiatives to help people feel connected and continued to support our local communities in a time of need.

INITIATIVES TO SUPPORT OUR EMPLOYEES

- Mental health counseling services and resources
- Virtual fitness and meditation classes to keep employees physically active, including a company-wide fitness challenge
- Tutoring discount benefits for parents challenged with virtual school environments
- Contests to bring employees together, such as virtual art shows, baking challenges and photo competitions (many of the photos used in this report were taken by our employees)
- Online book clubs, guitar lessons and music concerts
- Employee and family care packages

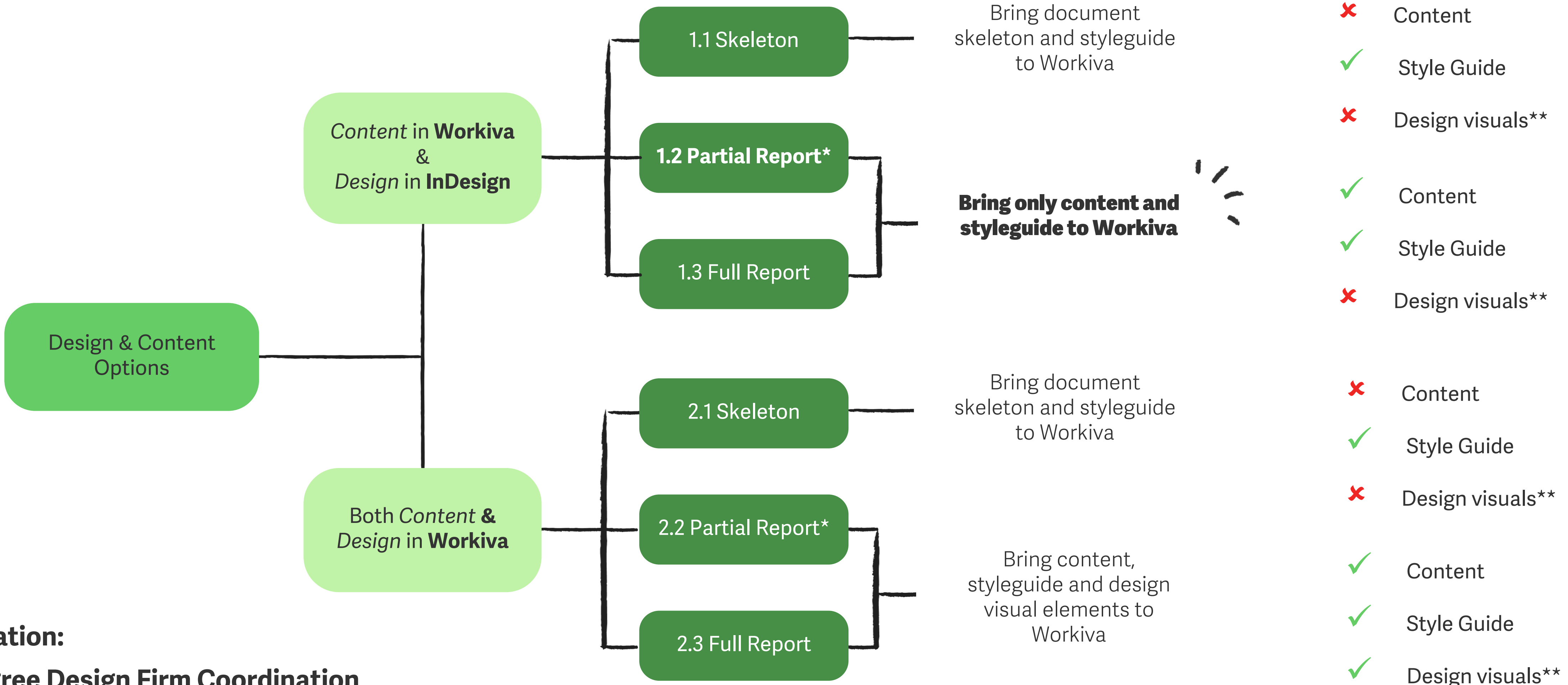
As parts of the world have started to open, our teams in Asia were able to come together to celebrate Lunar New Year with family activities such as strawberry picking.

Skeletal

or

Partial Report Set Up

Report Outputs Options



Recommendation:

Discuss & Agree Design Firm Coordination

* Setup of selected sections from the report.

** Layout, tables, visual elements, etc. Within Wdesk capabilities.

Report Design

Will design be done via external software?

Approach

Yes	No
Bring only content to Workiva	Bring content and design to Workiva
Set up to omit layout and design elements. *Design agency to provide Stylesheet and any other necessary information.* Read more about the ICML Approach.	Set up based on the source file maintaining design elements (within Wdesk capabilities). *Client to provide Stylesheet and any other necessary information.* Read more about the PDF Approach.

Output

Yes	No
ICML, Docx	PDF, Docx

Report Content (Document)

Will content be included?

Approach

Yes

Bring content and styleguide to Workiva

Set up document outline, style guide and link tables/dates and/or text values.

Client to provide Template Document with Stylesheet and any other necessary information.

Read more about the ICML Approach.

No

Bring only document skeleton and styleguide to Workiva

Set up document outline and style guide

Client to provide Stylesheet and any other necessary information.

Read more about Style Guides.

Skeleton Report

1 **Create a new document**

2 **Create Document outline**

Create sections based on the structure of the document. Best practice is to follow the Table of Contents, unless otherwise specified.

3 **Setup Style Guide**

Create your styles for text and tables.

4 **Client to add content and apply styles**

5 **Client/ Agency to add design**

Partial/Full Report (External Design)

1 **Import document**

2 **Set Document Properties**
Set language, page and table properties

3 **Create Document outline**
Create sections based on the structure of the document. Best practice is to follow the Table of Contents, unless otherwise specified.

4 **Setup Style Guide**
Create your styles for text and tables.
Make sure all text has a style applied.

5 **Format Document**
Format the document following the styleguide to match to the original source.

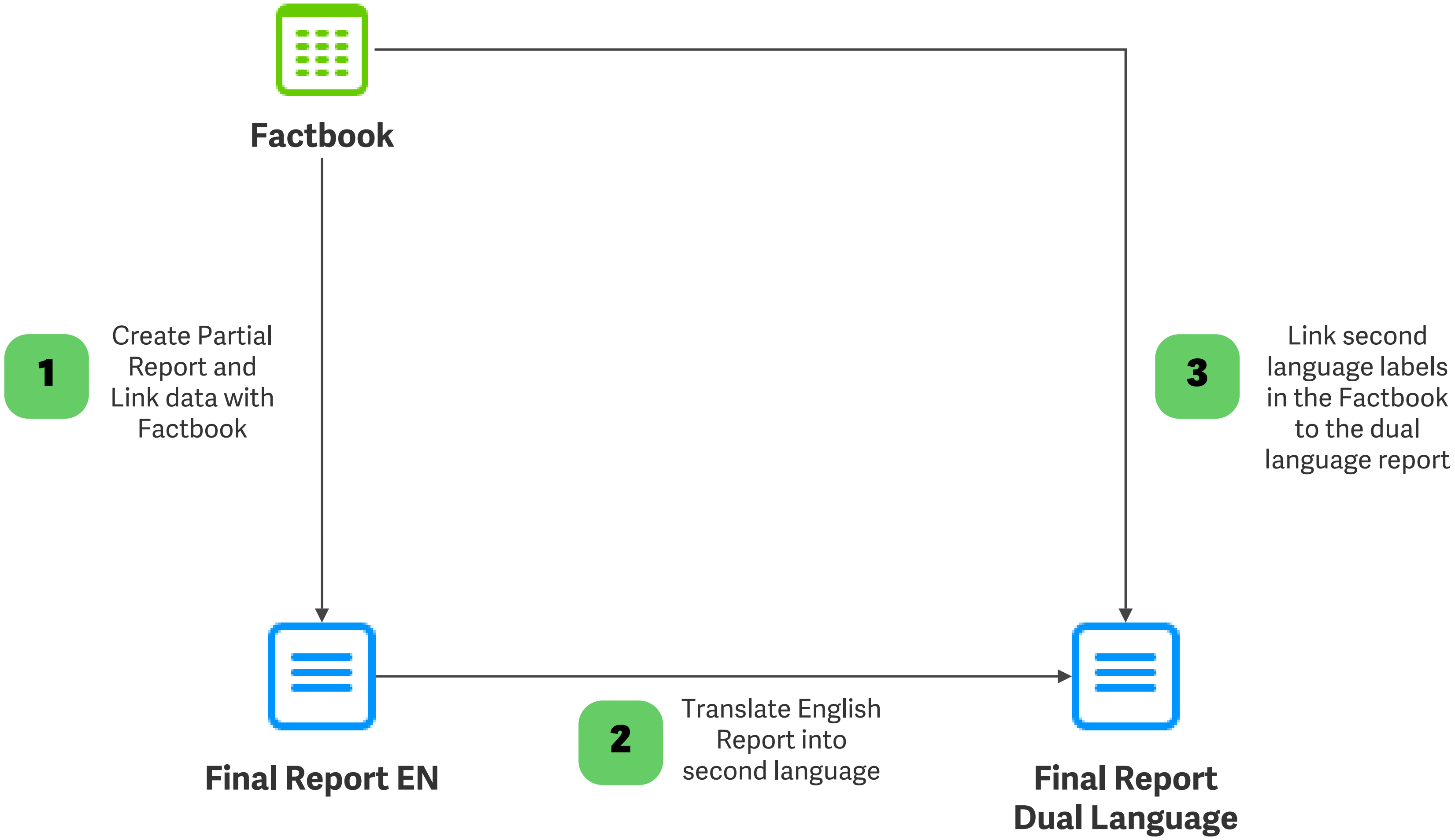
6 **Setup Headers and Footers**
Create headers and footers as needed based on the original file.

7 **Linking**
Link tables, dates and/or text values

8 **Set Permissions**

9 **Client/Agency to add design**

Dual Language Setup



Demo: Discovery - Reporting Outputs

Discovery Session - ESG Data Collection Templates

Customer DC Lead:

Provide the relevant source documentation and files for data collection, such as any existing spreadsheets used to collect data, and overviews of the data owner and approver.

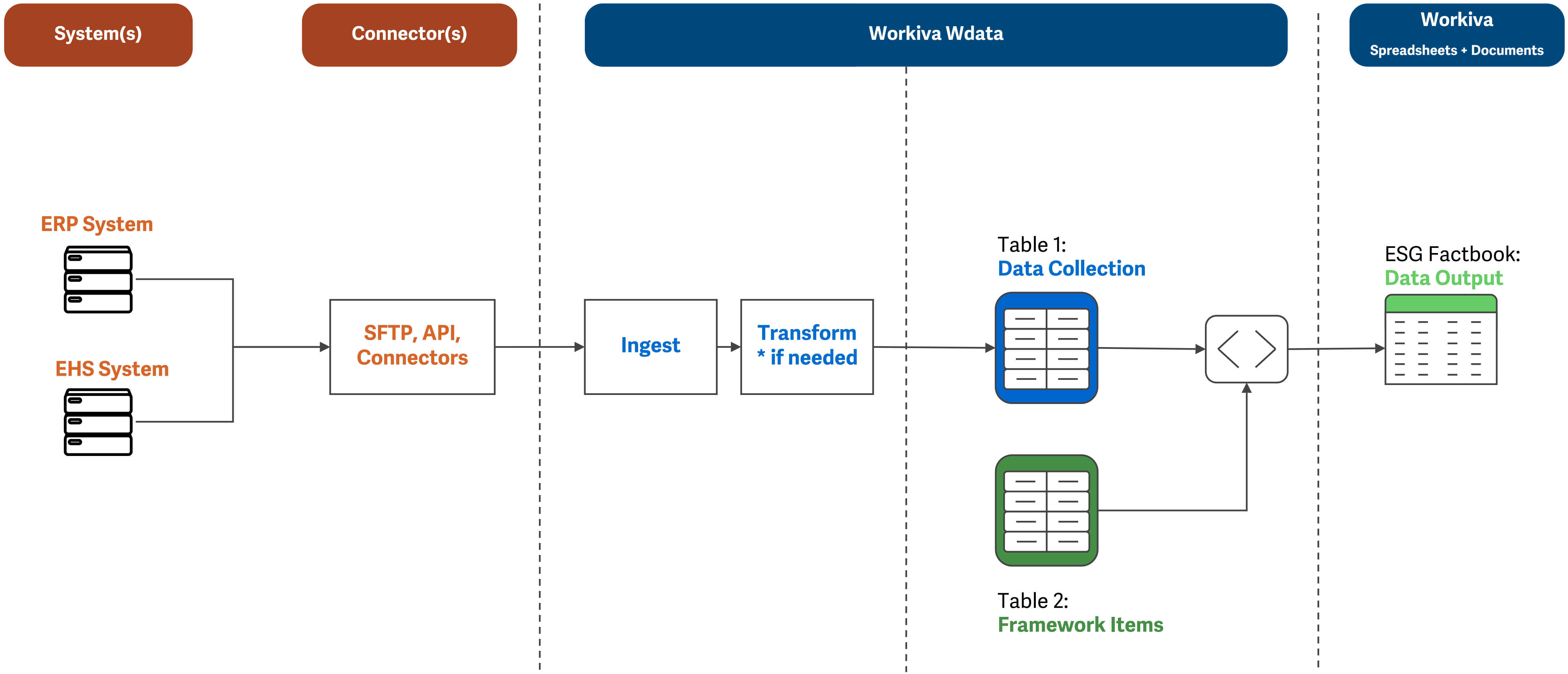
Recommendations:

- Discuss and agree on data collection template approach
- Discuss and agree on data collection status tracking approach with data provider/approver tasks
- Test preliminary import if Data Collection Files are in .xlsx format
- Confirm with Customer which columns would be leveraged to define TAGS

Workiva Support Site - Processes

Demo: Discovery - Data Collection

Source System Connection High-level Overview



Discovery Session - ESG Source System(s) connection(s)

Customer Integration lead

If applicable, provide relevant information for connections to source system in the scope of the project, such as the system's name and its data reports. The client is responsible for bringing the appropriate skills and people for the source system to the call.

Recommendations:

- Discuss connection options, planning and phasing
- Share guides and other resource with client inclusive of connector details information
- Update planning in draft project plan to reflect agreed on approach

Data Discovery Components* - *If Connecting to Central Data Source*

Recommendations: Review of Provided Data

1. The objective is to understand the specifics of the client's process—what data moves where, the formulas used, etc.
2. Confirm with the client that they have all data collection and framework(s)/standard(s)/and questionnaire(s) information and mapping files needed for their current process.

- Manage connectors for chains
- Connector types

Recommendations: System Report Criteria

1. What data is available from the source system(s)? What does the client's process need?
2. The client IT lead is often not who generates the needed reports. In advance of this discussion, determine whether another team is involved in report generation.
3. If integration is via an API, request sample data and mapping files as far in advance as possible.

- Manage GroundRunners for connections
- Chain Builder security architecture

Design & Build Phases

Demo: Design & Build

Linking & Style Guide

ESG Data Collection Templates : Design & Build

Best Practice Description:
Set up the client-provided files in the Standard ESG Data Model sample

Design DC Steps:

- Set up status tracking for this sample with data providers
- Define and establish TAGs that are applicable for Data Collection Topics
- Validation session on data collection with client + client signoff
- Automate ESG data collection with Processes (Workiva Support Site)

Demo: Design & Build

Data Collection

ESG Report Outputs

Best Practice Description:

Build an example of ESG output report (design preview) based on the files provided by the client.

Features:

- Set up example style guide & report based on client provided files
- Validation session on document setup with client + client signoff
- Duplicate steps above if more than one output report is in scope
- If the project involves an integration - ensure the integration provided data matches the client provided sample.

Deliverable: Example Linking

Best Practice Description:

Establish ***a single source truth*** for figures referenced multiple times, and ***granular control*** over how updates are published.

Recommendations:

- Link cells that will have values at some point, but not any truly blank or spacing cells.
- Use cell references for references between sections in the same spreadsheet
- Ensure the proof-of-concept includes examples of linking to presentations or documents as applicable
- Link majority/all dates from central dates page section in Data Collection Spreadsheet

[Linking Best Practices]

ESG Frameworks, Standards : Design & Build

Best Practice Description:

Set up the Framework Mapping spreadsheet with the content provided by the client

Features:

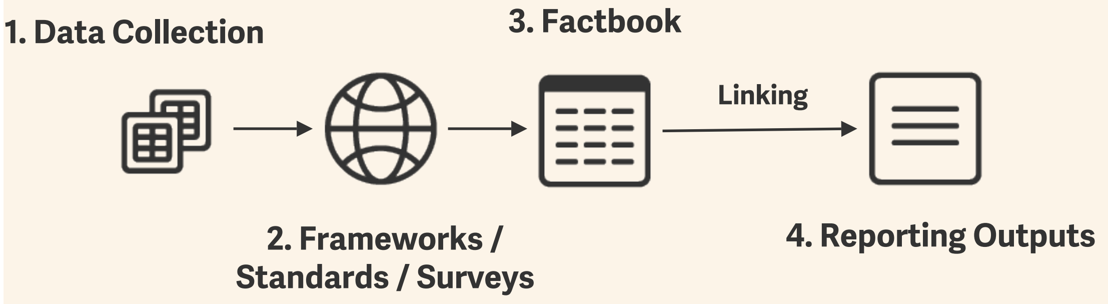
- Framework output spreadsheets leverages mapping across GRI, SASB, TCFD, SDG, CDP
- Confirm mapping approach with customer for additional frameworks *if applicable
- Set up the central Factbook with an example of performance indices and disclosures
- Validation session on frameworks with client + client signoff

Demo: Design & Build - Frameworks

ESG Base Solution

The **Connected ESG** solution helps clients automate data collection for quicker, more nimble reporting.

Example Future State



Key Components

- **Data Collection of Customer Data and their templates**
- **Central location in Wdata Tables of Collected Data**
- **Alignment to key frameworks that Customer leverages in their reporting process**

More Background ESG Framework

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Key Meetings & Syncs

Partner Syncs

Trainings and recurrent meetings - After the Kickoff call, Partner should agree with the Customer the optimal meeting cadence to provide support to the customer team along the project.

Kickoff call Presenting both teams and set up the structure for the project by each workstream*.

Presenting a Pre build design.

Discovery call preparation - Partner reviews customer files

Design review - Design review (for each workstream*) and outputs design.

Build review - Building review for each workstream*.

Roll-forward training - training delivered to the Customer.

Closing the project - Agree with customer to close the project.

Alignment/Discover | **Design** | **Build** | **Enable/Close**

Customer Syncs

Discovery call** Gain understanding of client information process, and bring alignment for each workstream*.

Design call** Recommend, develop and demo a scalable connected reporting process.

Up to 2 different meetings until getting the sign-off.

Build call** Replicate and test the solution in accordance with statement of work.

Present to the client the created solution.

Enable calls Provide roll-forward documentation and training to the client. Record the meetings.

Close project wrap up, evaluation with the client

*Workstreams in ESG solution: (i) Data Collection, (ii) Frameworks, (iii) Factbook and (iv) Reporting Outputs

** After these calls, it is expected that the project overview reflect the current state of implementation

General Implementation Timeline

Month 1 | Month 2 | Month 3 | Month 4 | Ongoing reporting process

ESG Data Collection

Amending and duplicating templates to capture qualitative & quantitative data

Align | Discover | Design | Build & Enable | Go-Live

ESG Framework Management

Mapping and Modeling of core frameworks and questionnaires to meet clients reporting needs

Align | Discover | Design | Build & Enable | Go-Live

ESG Factbook

Template creation to meet client reporting needs

Align | Discover | Design | Build & Enable | Go-Live

ESG Report Build

Import most recent report content into Workiva, link to Performance Data, Discovery with InDesign Team and allow for SEC team data to be linked

Align | Discover | Design | Build & Enable | Go-Live

Deliverable: Account Setup & Internal Alignment

Deliverable Description:

Provisioning of the customer's account, and sync with the pre-sales team involved with the project. Review of SOW and goals and deliverables outlined in Statement of Work.

Recommendations:

- Set up the workspace with the client's main point of contact as a workspace owner
- Other users can be added after the kickoff meeting.
- Alignment discussions should capture
  - **Frameworks used**
  - **Client pain points**
  - **Any exclusions or callouts not captured by the SOW**

Customer Delivery of Documents

Deliverable Description:

Receipt of content outlined in ***Document Request Checklist* -** A detailed document request checklist is on the next slide

Recommendations:

- ESG Report & Sustainability Presentations / Disclosures
- Data collection templates and source documentation
- ESG Framework mappings and questionnaires that customer aligns to and leverages
- Cross-Framework and Standard(s) Customer aligns with as per their industry

Document Request Checklist

Data Collection & Factbook	Frameworks / Standards / Surveys	Reporting Outputs	People
Existing data collection templates used to collect quantitative data, qualitative data, or both. ☑	Document and spreadsheets for each scoped framework, with a full list of each framework's material items (filled out with the prior year's responses, if available) ☑	Prior year's version of all output reports in scope of the project ☑	List of key team members on this project with an assigned lead for the following areas: Reports Frameworks Data Collection ☑
Central factbook in which all collected ESG data is consolidated/stored (if available) ☑	Document and spreadsheet(s) for each scoped questionnaire/ survey with full listing of material items for each framework (filled out with prior year's responses if available) ☑	Style guide associated with each output report (i.e. brand guidelines, style sheet) ☑	Prepare overview of periods of downtime, unavailable key team members and holidays ☑
Guidance on how data collection sheets relate to specific framework indicators (if available) ☑	Framework-to-framework mapping (if available) - Especially relevant if customer is aligning to multiple frameworks. ☑	Confirm the frameworks that are aligned and published in a final report. ☑	Who are all the people tied in ESG Process, plan of the metrics planning to collect, inclusive of 3rd party data providers. ☑

Note(s)

- If some items are combined into a single file, please provide implementation team with sufficient information to locate each item.

Note(s)

- If some of these items are combined in a single file, please provide implementation team with sufficient information to locate each individual item.

Note(s)

- If no prior year example exists, please provide draft/ template/skeleton structure of report
- Please provide in editable format (.docx)

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Sample Document Request - List of ESG Metrics : GRI & SASB

List of ESG/CSR Metrics for Avikro

Section	vant GRI/SASB Topic A	GRI Disclosure #	SASB Disclosure #	Specific Disclosures	FY19	FY20	FY21	Accountability	CSR, QDR, BOD, 10-K/Proxy, EEO-1 Currently Disclosing/Tracking
Social	Employment	GRI 401		a. Total number and rate of voluntary employee turnover during the reporting period	101; 6%	109; 7%	85; 6%	Joe Dirt	CSR website, QDR, BOD, 10-K
				a.Percentage (%) of staff who say Cirrus is a great place to work?	94%*	92%*	92%**	Bobby Boucher	Disclose but not by gender on CSR website, QRD, BOD (confirm)
Social	Employee Health and Safety	GRI 403	SASB: TC-SC-320a.1	*Qualitative description included in text*				Sonny Koufax	Limited on CSR website (H&S/Benfits) QRD, BOD (confirm w/ Jo-Dee/Ulf)
			SASB: TC-SC-320a.2	US Dollars ($)				Sonny Koufax	NA
Social	Training & Education	GRI 404		a. Total hours of training for all employees	15,644	16,335	11,800	Tony Perkis	QDR, BOD
				a. Percentage of total employees by gender and by employee category who received a regular performance and career development review during the reporting period - 100% of employees are eligible	Completion: 94% Overall 94% Male 95% Female	Completion: 91% Overall 91% Male 91% Female	Completion: 93% Overall; 93% Male; 94% Female	Tony Perkis	QDR, Executive Updates, BOD (not by gender)
Social	Diversity & Equal Opportunity	GRI 405		**"b. Percentage (%) of employees per employee category in each of the following diversity categories: i. Gender;**	1,551	1,443	1,481	Bobby Boucher	CSR website (i., iv), QDR (i), BOD (ii., iii) (confirm)
				Female	260	252	257	Bobby Boucher	

Environment | Social | Governance | SASB Activity Metrics

dy

110%

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Alignment Phase - Deliverable Checklist

Deliverable	Deliverable Components
Setup & Alignment	1. Provisioning of customer account / Workspace 2. Confirmation of client goals and objectives with the scoping team / presales team
Project Kickoff	1. Review of project timeline 2. Confirmation of project target date 3. Initial data request 4. Walkthrough of SOW 5. Confirmation of scope with client 6. Determination of data dependencies
Post Kickoff Admin	1. Scheduling of status cadence 2. Scheduling of discovery session(s) with client teams

Enable Phase

Build Testing and Signoff

Description:

Final walkthrough of complete build | Implementation Team & Customer ESG lead

Recommendations:

- Walkthrough journey of data flow from Data Collection to ESG Report
- Showcase Sample Data Entry, Data Collection Refresh, Factbook refresh and publish links
- Flexibility for supplementary validation and walkthrough sessions of the final build

[WDesk Support & Community]

End-user training

Best Practice Description:

Training all end-users of Workiva platform - Learning Hub Materials & Live Q&A Sessions

Features:

- Direct the client to relevant Learning Hub trainings.
- Topic-driven training based on client's process and needs.
- High level training agenda with session highlights to be provided to client in advance.
- Trainings should include working session(s) for remaining questions/issues.

WDesk Support & Community

Documentation

Description:

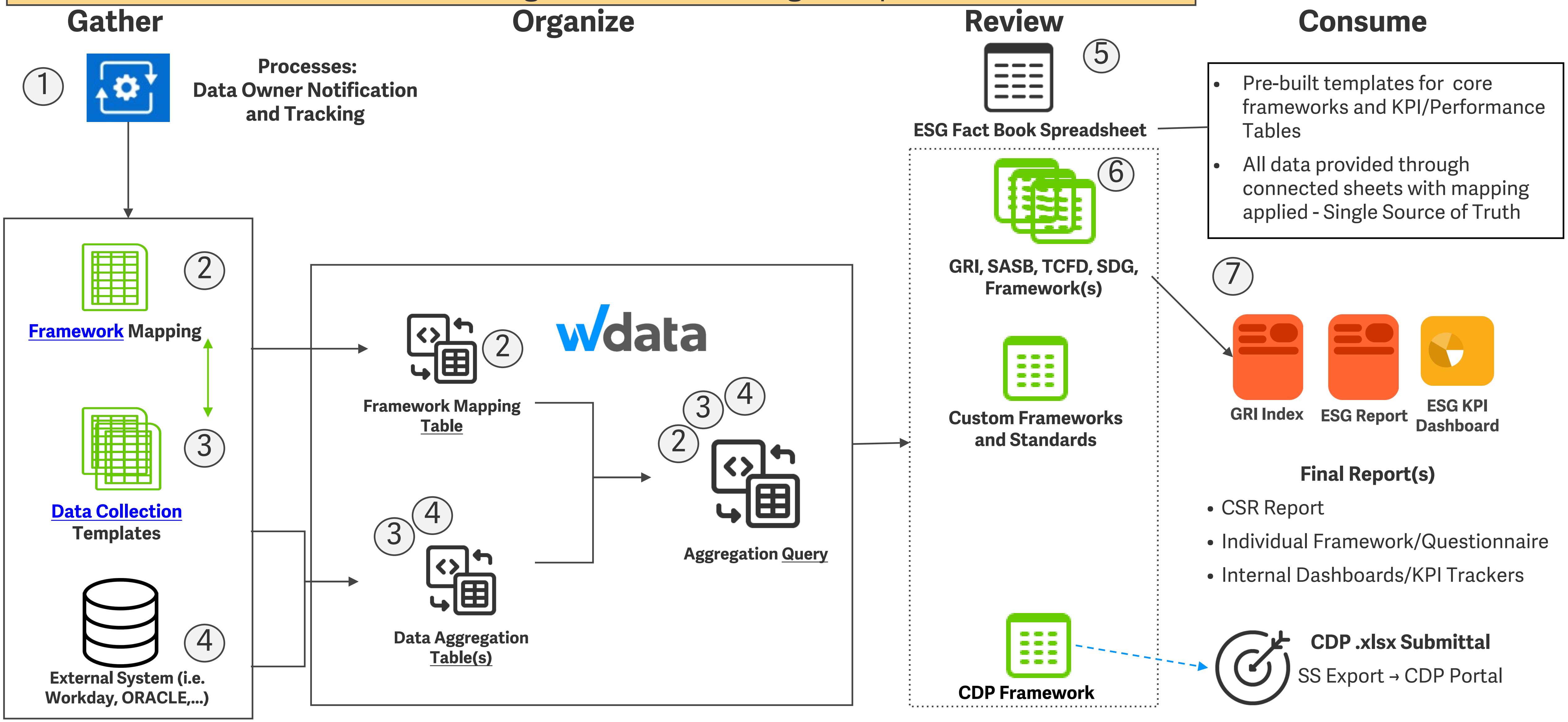
Draft and deliver Documentation of key build customization, as applicable to customer process

Recommendation:

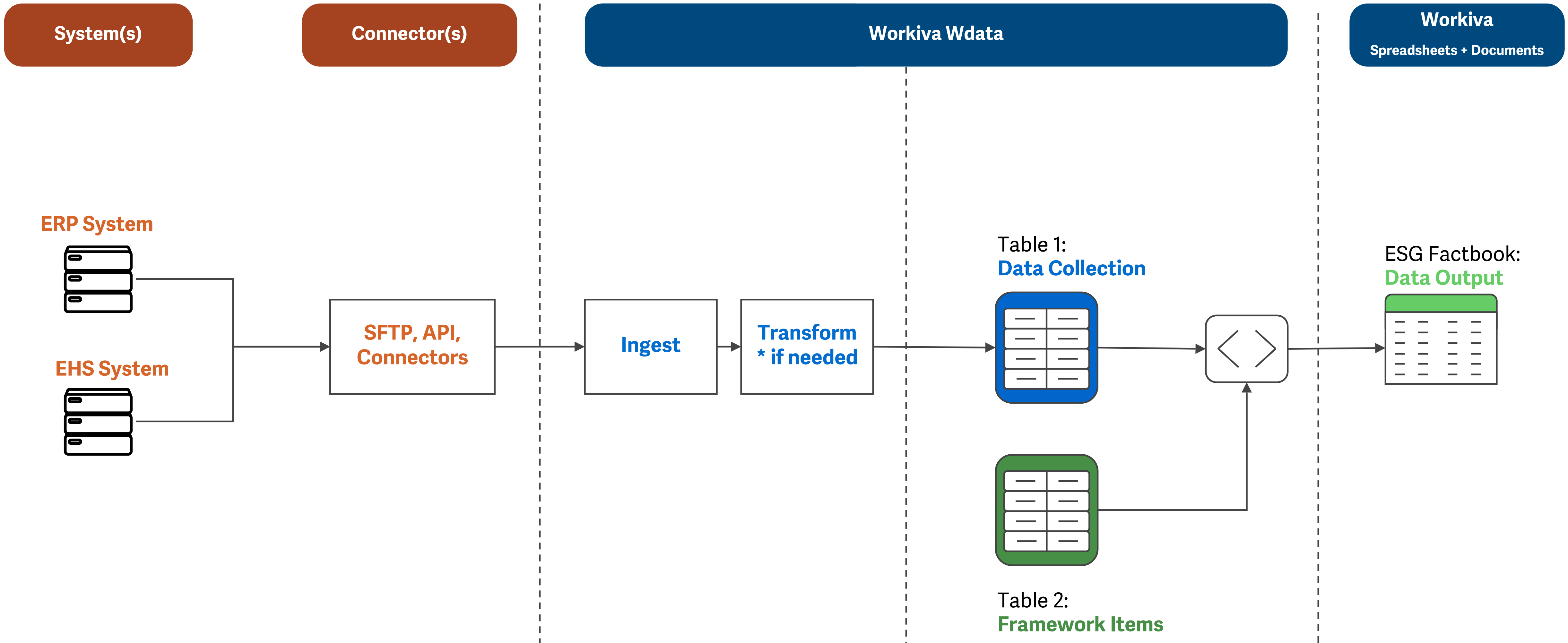
- Roll-forward documentation - after publishing, steps to prepare for next year reporting cycle
- Configuration steps & maintenance guidelines
- Tailored Data Flow Diagram based on Design Decisions and Build Customization aligned with customer's process

WDesk Support & Community

Enablement Process Flow : (Tailor Diagram Flow according to Implementation)



Source System Connection(s) High-level Overview



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General Overview - Wdata Tables

Data Tables

- Used as the source data for Wdata queries - can be loaded with .TSV or .CSV files, API connections or Spreadsheet connections
- If a field is not being used for a calculation, or is not a true date, code it as text.
- Use a separate data table for each discrete system / source of data.

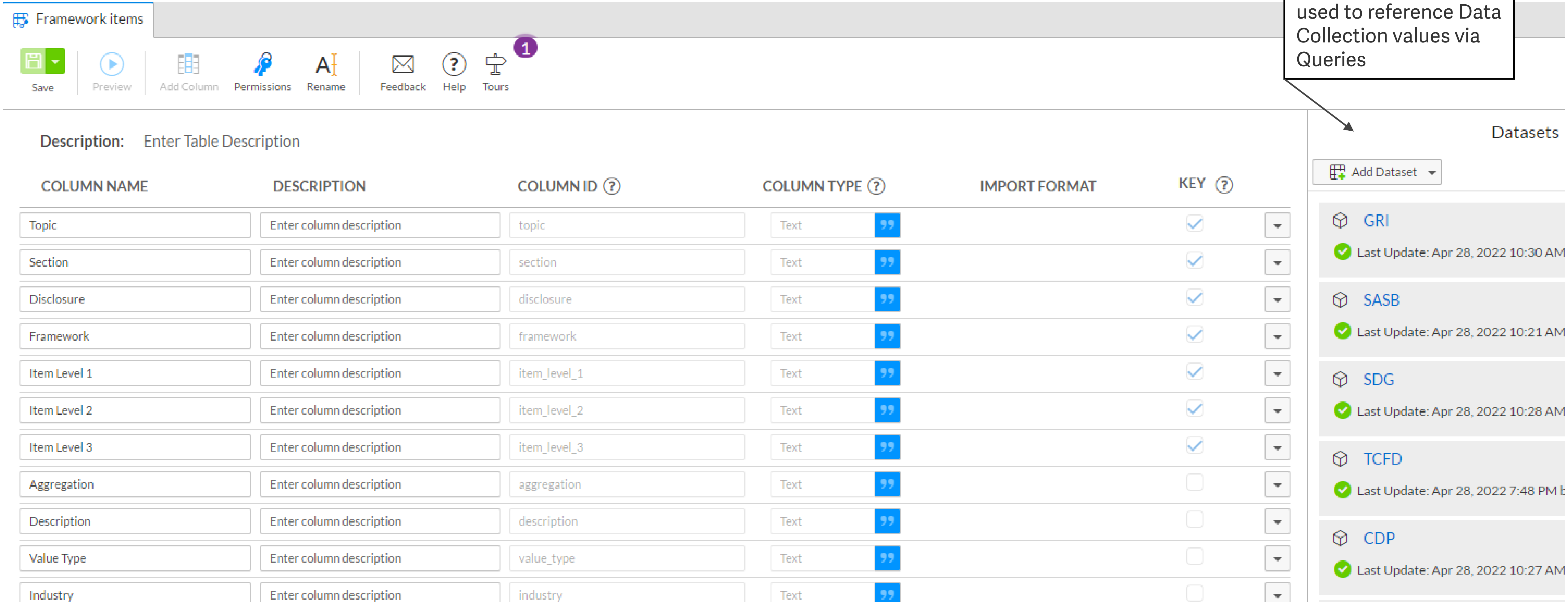
Dimension Tables

- Used as a mapping file for additional criteria used during a query - such as rollup categories.
- Ensure that dimension table line items are unique to avoid data duplication.
- Use the “Key” function for the lowest level of mapping (e.g. account number)
- Replace the source file when the criteria are updated, rather than uploading additional files.

Workiva Support Site : Wdata Tables

WData Table : Frameworks Dimension Table

Dimension Table stores Framework information that is used to reference Data Collection values via Queries



WData Table: Data Collection

Column ID is unique and aligns with the Flat File Structure in the Data Collection Spreadsheet

Data Collection Data for current years and historical years across different ESG Topics

Data Collection Table

Save | Preview | Add Column | Permissions | Rename | Feedback | Help | Tours 1

Description: Enter Table Description

COLUMN NAME	DESCRIPTION	COLUMN ID	COLUMN TYPE	IMPORT FORMAT
Topic	Enter column description	topic	Text	
Year	Enter column description	year	Text	
Data Type	Enter column description	data_type	Text	
Tag 1	Enter column description	tag_1	Text	
Tag 2	Enter column description	tag_2	Text	
Tag 3	Enter column description	tag_3	Text	
Tag 4	Enter column description	tag_4	Text	
Value	Enter column description	value	Text	
Data Provider	Enter column description	data_provider	Text	
Reviewer	Enter column description	reviewer	Text	
Status	Enter column description	status	Text	

Table Preview

TOPIC	YEAR	DATA TYPE	TAG 1	TAG 2	TAG 3	TAG 4	VALUE	DATA PROVIDER	REVIEWER	STATUS	COMMENT

Datasets

Add Dataset

- Incidents Flat Sample Overlay
  Last Update: May 23, 2022 4:04 PM by P
- Site - LA - Starter Pack
  Last Update: Apr 29, 2022 11:54 AM by
- Site - KS - Starter Pack
  Last Update: Apr 29, 2022 11:54 AM by
- Site - CO - Starter Pack
  Last Update: Apr 29, 2022 11:54 AM by
- Site Consolidation - Starter Pack
  Last Update: Apr 29, 2022 11:53 AM by
- Organization Info - Starter Pack
  Last Update: Apr 29, 2022 11:53 AM by
- Emissions File - Starter Pack
  Last Update: Apr 28, 2022 5:53 PM by P

General Overview - Wdata Queries

Best Practices

- Targets information that is needed.
- Set parameters for the criteria most likely to change over time (e.g. Year or date)
- Consolidate what you need. If you do not need the data, leave it where it is.

Worst Practices

- Query out all off the data from the data tables
- Manually update settings for each run of the query
- Workstreams designed with over 1M+rows of a query result

Workiva Support Site : Wdata Queries

WData : Primary Query

ESG Primary Query

Save | Run Query | Reset | Create View | Permissions | Properties | Feedback | Help | Tours

Results of Primary Query organize Data Collection information with their associated Framework and User Defined Tags

Sources

Add to Fields

- Calculation
- Data Collection Table
- Framework items

Primary Query leverages the Data Collection Table and Framework Items to Organize Data into a central data stream

The Primary Query outputs values in Data Collection table that match the SASB Framework, SASB Industry, and Reporting Year

Fields | Filters | Sort | Relationships

Builder | SQL

HEADER	SOURCE	SOURCE COLUMN
Topic	Data Collection Table	topic
Year	Data Collection Table	year
Tag 1	Data Collection Table	tag_1
Tag 2	Data Collection Table	tag_2
Tag 3	Data Collection Table	tag_3
Tag 4	Data Collection Table	tag_4
Value	Data Collection Table	value
Data Provider	Data Collection Table	data_provider
Framework	Framework items	framework
Item Level 2	Framework items	item_level_2
Description	Framework items	description
Key Data Output	*Multiple*	*Multiple*
Key KPI	*Multiple*	*Multiple*
Key Frameworks	*Multiple*	*Multiple*

Drop column to include in query results

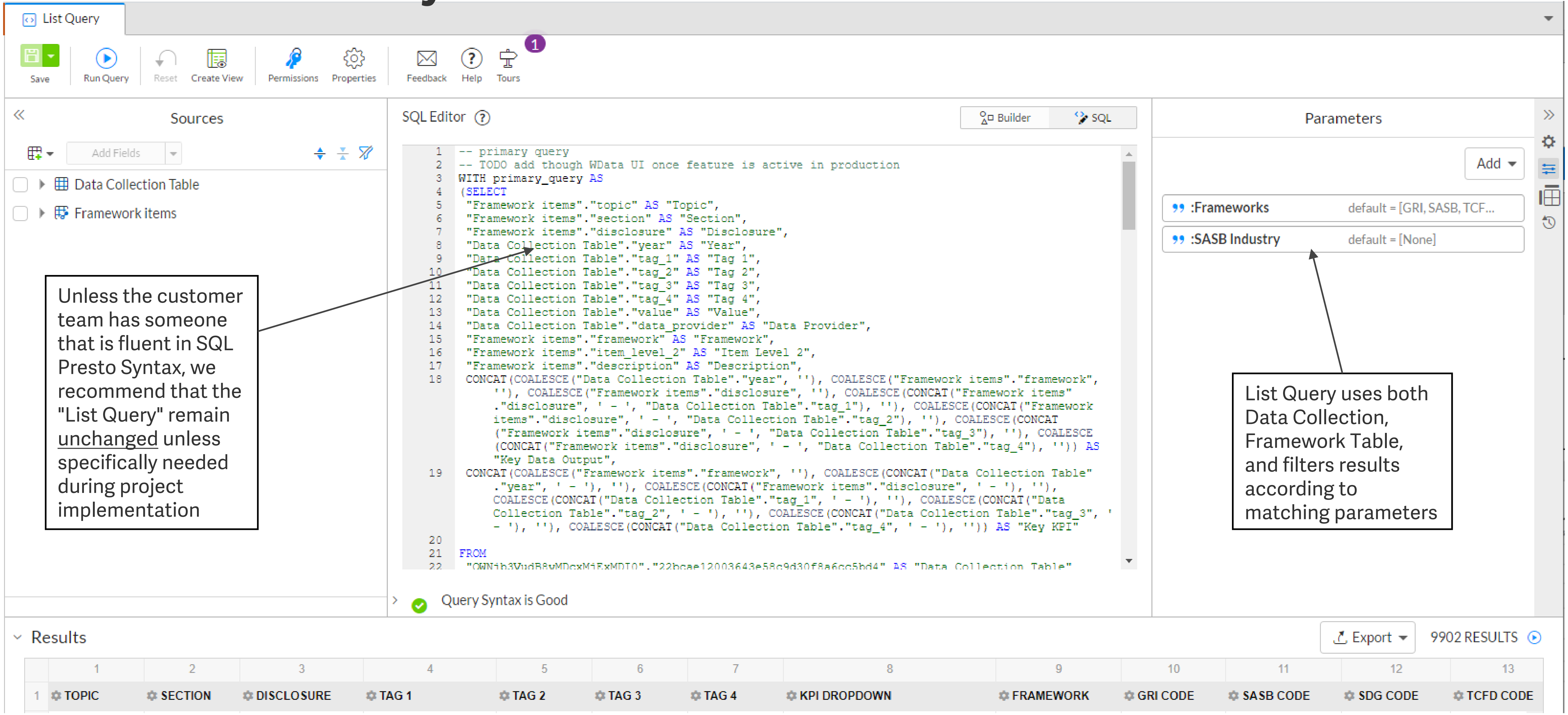
Parameters

Add

:Frameworks	default = [GRI, SASB, TCF...
:SASB Industry	default = [None]
:Year	default = [2020, 2019, 20...

Query Parameters are defined and interact as Filters across the Frameworks, SASB Industry, and Reporting Year

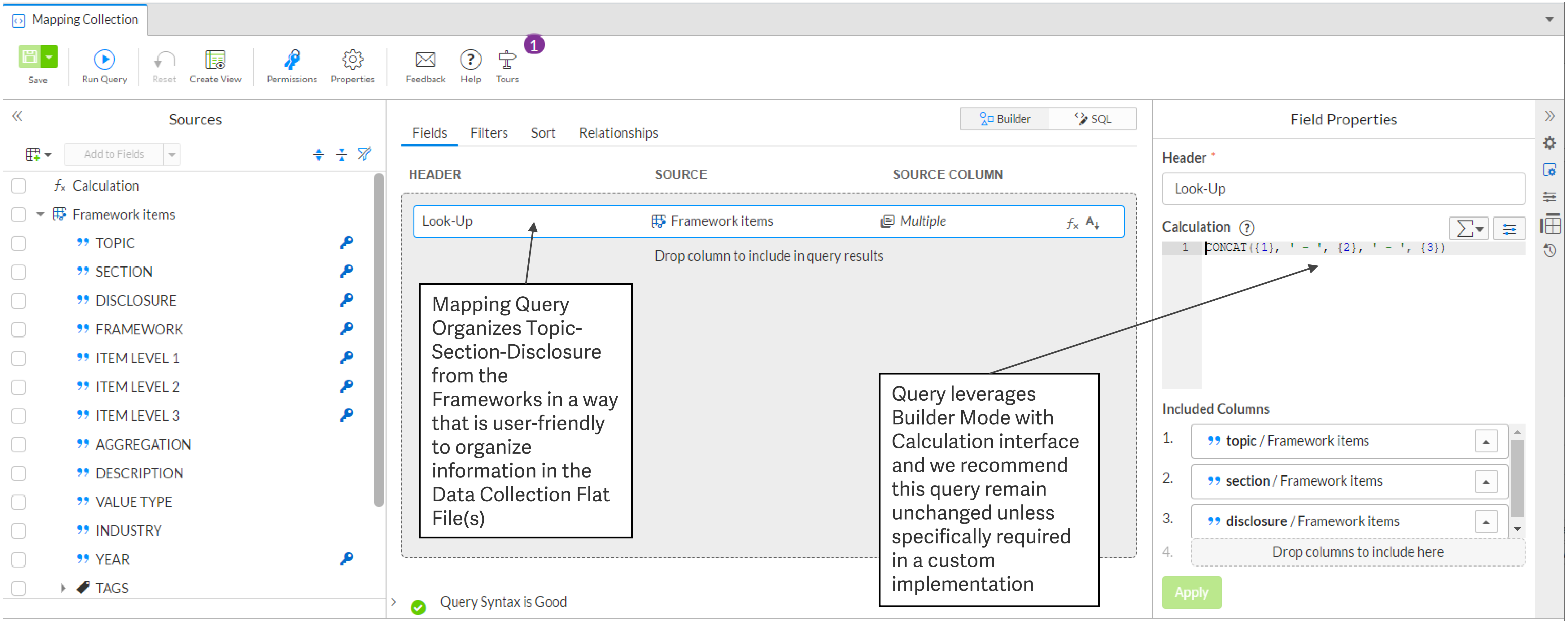
WData : List Query



Unless the customer team has someone that is fluent in SQL Presto Syntax, we recommend that the "List Query" remain unchanged unless specifically needed during project implementation

List Query uses both Data Collection, Framework Table, and filters results according to matching parameters

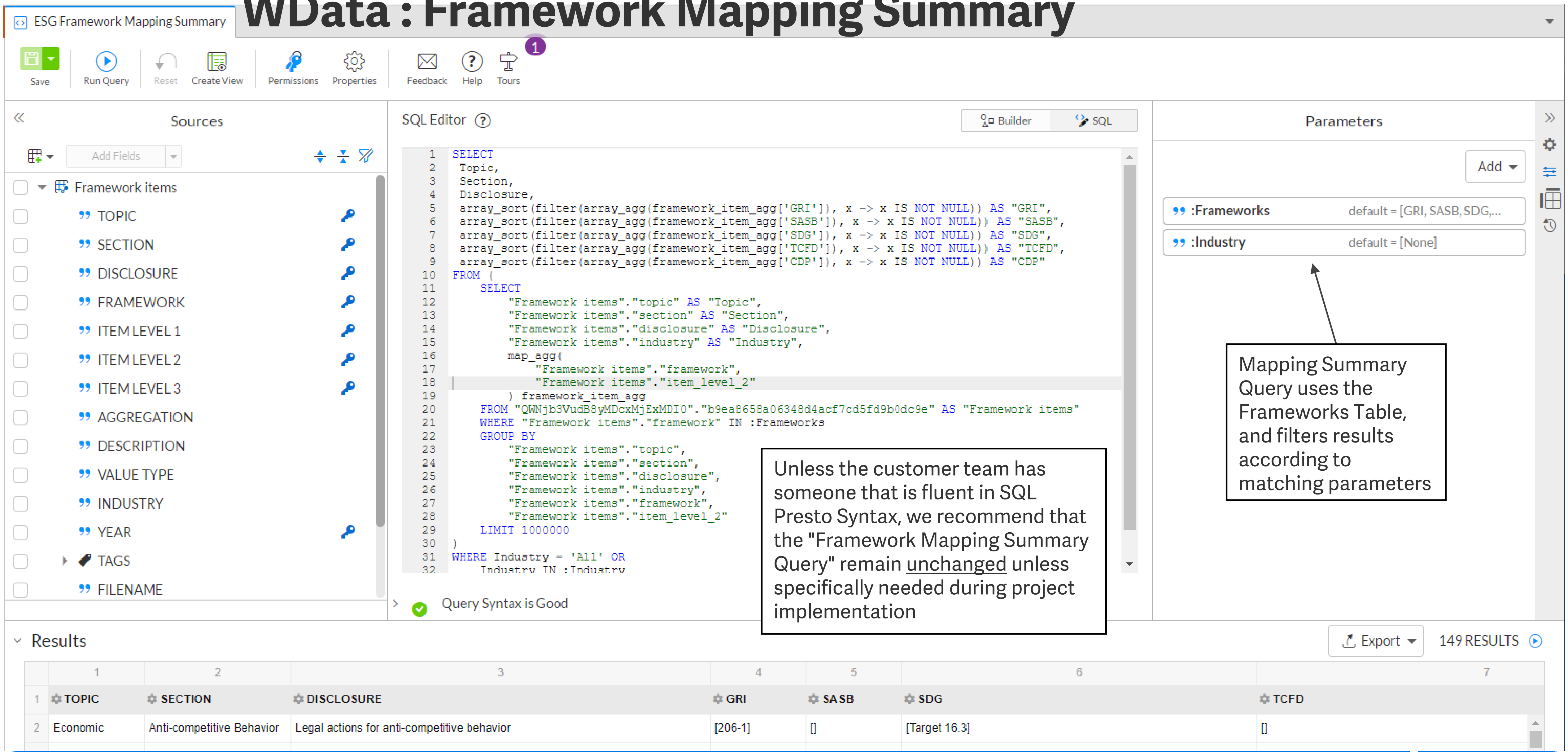
WData : Mapping Query



Mapping Query Organizes Topic-Section-Disclosure from the Frameworks in a way that is user-friendly to organize information in the Data Collection Flat File(s)

Query leverages Builder Mode with Calculation interface and we recommend this query remain unchanged unless specifically required in a custom implementation

WData : Framework Mapping Summary



Unless the customer team has someone that is fluent in SQL Presto Syntax, we recommend that the "Framework Mapping Summary Query" remain <u>unchanged</u> unless specifically needed during project implementation

Mapping Summary Query uses the Frameworks Table, and filters results according to matching parameters

Go Live

Roll Forward

Roll Forward Key Themes

Historical Data

- How does your customer need to store historical data?
- Would a manual process work for the customer?
- How much historical data needs to be retained?

Refreshing Data

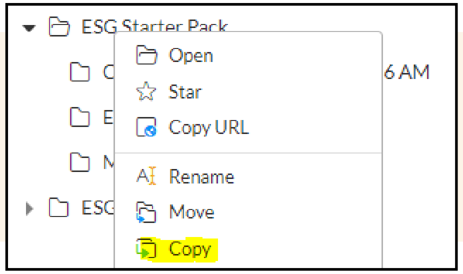
- Will your customer append or replace existing data?
- Do mapping criteria need updated?
- How often must data be updated?

Publication

- How often is the final reporting deliverable published?
- Who will be responsible for publishing the updated data?
- What format is the final deliverable needed in?

Rollforward Best Practices Steps - Copy Folder

Copy Folder & Keep Connections



Rollforward Steps

- Copy ESG Folder that Contains Core Files (From File/Home view in Workiva)
- Default Selections
  - Create copies of all source files
  - Connections : Incoming & Outgoing Connections
- Folder name w/ new Reporting Year : 202X
- Refresh Outgoing Connections and Rename with New Reporting Year