

Design & Build External Connectors

During the design and build phases if there is a need by the customer and is within scope of the project to establish source system connections, we recommend this work stream be in parallel and provisioned with the necessary IT and customer integration lead team members as well as socializing resources of technical and content information early on in the project to allow adequate time for testing data validation as well as potential installations that may be needed to establish these kinds of connectors. We'll highlight the areas where this content information lives within the support site inclusive the connector types the connectors across the chains, functionality setting up a ground runner and also some of the general security and architecture information that is available to share with an IT team. We'll start by first taking a look at a list that is maintained of the current connector types that are part of the core connector group as well as premium connectors that can be enabled at the request of a customer and as long as it is in line with their current subscription service. As you scroll through these, we've preemptively opened an SFTP connector that falls under our premium connector list where you will find the general information on what is required to set up the connector as well as the staging of information and the SFTP server and the customer would need to establish as well as the authentication criterion and how the process could be tested and validated even before sharing potential production environment data. We also recommend reviewing the connectors for chains as if there is going to be potential transformation of data as part of this process. The change ecosystem and functionality can help leverage some of this flexibility before actually pushing data to a spreadsheet or Wdata table as we will highlight all of the support web articles are updated to reflect the latest functionality and latest information across that topic. We also recommend reviewing with the respective IT team if a ground runner which is a way to interact with on premise or remote data sources is needed. The steps they can leverage whether it's the installation via specific executable file or even potential cloud options that allow them to authenticate prior to establishing a connection with Workiva. We also highlight that the support site has also the security information that may be needed by an IT team and as they evaluate what may be a viable way of communicating or sharing data across their source systems for ESG reporting purposes this information is also updated as to be latest and current with what what the Workiva platform allows and some of the requirements in IT team would assess invalidating if a connection would it be possible for all things. We do recommend first navigating to the set of connectors and seeing what is necessary for each. You will notice that as part of the ESG solution the core connectors list is all available out of the box. As an example if we click into the http request, then we would get the localized information on how to set up this information if data was going to cross because this protocol.