



Automating Business Processes in the Workiva Platform - Workshop FAQ:

Q: How can I beta test processes?

A: If you are interested in beta testing, you can reach out to me directly. My email is katie.sanderson@workiva.com

Q: How will processes impact current chain implementations?

A: The chain's experience remains as it is today. The added value is that we will eventually be able to call a chain from a simple action in the process builder. For example, the process builder action might simply be 'import trial balance' however the chain that you have already built is what is called and executed in the background.

Q: What solutions will have processes enabled/ what is the plan for pricing?

A: The demo that you saw here today is our basic offering that will be available for all solutions. It is possible that we may decide to suppress our processes offering in our IR solutions since they currently have some similar functionality that could create some confusion for the user. Over time, we hope to centralize our process & automation capabilities with the IR space. Also, what you saw here today is our basic offering, we are currently exploring our pricing and monetization strategy as we add more complexity to the product.

Q: Can any of these tools facilitate a roll forward procedure to eliminate burdensome copy/paste activities at period end for period over period comparisons?

A: The demo today showed the capabilities you can expect when we launch processes at the end of Q2. Our initial product offering will support process actions that are task based and involve human interaction. Eventually we plan to support a catalog of actions that will include systematic capabilities like copying a document, inserting columns, and copying & pasting data to support automating the roll forward process. We will begin developing some of these systematic capabilities starting in the second half of this year.

Q: What sort of integration to source ERP systems do you envision for executing process steps in those systems? For example, closing the books in the ERP system involves a series of steps. Do you envision calling the ERP system from Workiva to actually execute those steps?

A: For the moment we are focusing on managing process steps that occur within the Workiva Platform. We are exploring options for future external integrations (beyond ETL data movement which we already support today).