

Background could be your company color(s) or an image you use often for presentations

The Workiva Platform - Part I

Instructor: YOUR NAME HERE
TITLE

Learning Objectives

By the end of this course, you will be able to:

- Access the Workiva Platform
- Navigate and Organize Home
- Create/Edit Documents, Spreadsheets, and Presentations
- Make Documentation Interactive via Linking
- Utilize Digital Review features
- Access Additional Resources, ?

Agenda

Part I

- Organizations/Workspaces
- Navigate Home
 - Organize Folders
- Create a Document
- Format Documents
 - Properties & Permissions
 - Populate and Format Text & Tables
 - Insert Hyperlinks & Auto-text
- Review Features
 - Track Changes, Blacklines, Comments, Tasking

Agenda

Part II

- Create a Presentation
 - Create & Format a Chart
- Create a Spreadsheet
- Learn How to Create All Types of Links
 - 1:1, 1:many
 - Subcell linking
- Publishing & Partial Publishing
- Navigating Link Properties
- Purple Question Mark

Organizations & Workspaces

Purpose of Workspaces

- A place for an individual team to collaborate
- Customize your space
- Ability to easily find and organize your files
- Secure
- Move files across teams safely

Using Workspaces

Belonging to a Workspace

- You may belong to one or more than one workspace
- Easily switch between workspaces

Creating a New Workspace

- You can create new workspaces - *if allowed by your organization admins*
- You will be the Admin (can manage members and groups)
- Type of workspace dictates what features you have access to
- Select workspace type with care

Company

(Organization)



SEC Team
(Workspace)

SOX Team
(Workspace)

**Risk Reporting
Team**
(Workspace)

Audit Team
(Workspace)

YOUR LOGO HERE

Demo

Workspaces & Home

- Navigate
- Create
- Admin
- Folder Organization
- Folder Copy

?s

Workspaces

Workiva Home



What can I do there?

- Search, Access, and open your files
- Organize your content
- Create documents, spreadsheets, presentations, and folders
- Access User specific items
 - Recent Files
 - Starred
 - Tasking
- Copy a folder = rollforward
- Other
 - Certifications - all
 - Filing/Section 16
 - Database/Audit

Open a Document - Activity

Your Turn!

1. Search for the "Class Discussion/Polling" Document from home
2. Open it
3. Find the section with your name on it
4. Type a response to the question in the gray box

Now check out the "Class Discussion Results" section to see what everyone else's answers were.

Back to Workiva Home

How do I get home?



Note: Wdesk Home will also be your first landing page upon log in.

YOUR LOGO HERE

Back to Workiva Home

How do I get home?

- The Workiva Home browser tab is collapsed on the left side and is always accessible



Note: Wdesk Home will also be your first landing page upon log in.

YOUR LOGO HERE

Create and Organize a Document - Activity

Your Turn!

1. Create a Document:

- a. From Home>Create>Document
- b. Under File>Rename it "YourName Doc - MM.DD.YY"

2. Organize your Document:

- a. Go back to Home
- b. Locate your newly created document (may need to refresh)
- c. Move it to the "TODAY'S DATE Participant Files" folder

From Classic to Next Gen



Classic Documents



Adobe Flash Player




Documents

NEXT GEN


HTML5

-  Classic Document
-  Document


From Classic to Next Gen




Classic Documents




Adobe Flash Player



Documents



HTML5

-  Classic Document
-  Document

Disabled on 12/31/2020*

*could be earlier due to changes being rolled out by browser and Adobe

?s

Home & NextGen