## SEC Single Source

# Chapter 1 What is Single Source and how does it make a SEC usage more efficient?

0:01

Hello.

0:02

My name is Jake Acres.

0:03

And this training video is all focused around how to transition customers to single source when it's appropriate why customers do it and ultimately how partners can help get these particular transitions going to make customers that much more efficient in their usage of W desk.

0:22

Now to get started off, it's extremely important to understand how customers are traditionally set up in w desk at least initially as they become customers of work Eva and start doing their sec filings in our platform.

0:35

I actually have a crude drawing, I want to show here to illustrate this discussion to help people understand how the initial setup is done and ultimately what it means to be single source and what efficiencies that brings.

It's important to know that when people first start using our platform, they almost always have an imminent filing.

### 0:54

So speed of setup is very important because of this.

#### 0:58

We almost always deploy people in the fashion that you're seeing on my screen.

#### 1:02

Now with a 1 to 1 linking setup and separate spreadsheets that are connected to their individual filings.

## 1:10

So for example we set up a 10-K spreadsheet that is linked to a 10-K filing document And we do the same for the 10-Q.

## 1:20

The way that this works in a 1 to 1 linking setup that I'm showing now is as people roll their 10-Q from Q one Q two to Q three, they're copying that 10-Q.

#### 1:32

And the prior filing is the starting point for the next filing.

## 1:37

As people then approach the 10-K.

Or annual filing, they will roll it from last year's 10-K.

## 1:44

What's very important understand about this setup and the linking is that it is a 1 to 1 linking setup and I'll actually go into a document to describe that in further context shortly.

## 1:55

But the main purpose here is that we set up the document, we build the tables and numbers and then we throw them into a spreadsheet, just 1 to 1 and we link that number from the spreadsheet to the individual number.

## 2:08

And the document, Even though that number is likely used in many locations and multiple links would be more valuable and more in line with how our product is really helpful and streamlines people's activity.

## 2:22

The initial setup is just 1-1 and the customer's usual, we will advance it from there, you know, breaking some of the links, making one too many linking relationships.

## 2:31

That's really how w that should be used.

## 2:33

But because we're always working against a deadline of an imminent filing, the initial setup needs to be quite basic and then it's refined from there.

This isn't all bad actually gives the customers a very simplified experience as they first start utilizing w desk.

## 2:48

So it makes it easier to adapt and understand and learn and then they get the great benefit of beefing up their linking as they're working through learning the platform and becoming experts and using it.

### 2:59

So there are certainly elements of why we have to do this but knowing what you're coming into and why you may encounter this 1-1 linking setup is important context.

### 3:10

Now the normal transition from there, if we want to really advance the setup and make it more streamlined going single source is the next natural evolution of using w desk and I'll explain why when you start off initially with separate workbooks for the filings, if you do any work in that tin Q and you build it up and write some nice rounding formulas or you add some cross checks and validations, You end up having to do the exact same amount of work in the 10-K spreadsheet because they're not connected in any context, any improvements you make in the filing process had to be built and maintained in each spreadsheet, doubling, pretty much all of the work.

#### 3:52

The alternative is to go single source as my particular slide here shows what we then have is one central spreadsheet that is linked to both the 10-K and 10-Q.

#### 4:05

Meaning there's only one spreadsheet that I have to build up in the efficiencies in for cross checks, rounding trial balance related formulas, whatever it may be.

I link it all from one spreadsheet that rolls forward every single quarter whether it's a 10-K filing period, 10-Q.

## 4:22

It doesn't matter it all rolls forward and it even has the added benefit of also linking up all other relevant filings like your exhibits, earnings releases, committee decks, whatever could be relevant.

### 4:34

It all should be coming from one source that is maintained all year round.

### 4:38

Also for our sec filers out there, anyone who has experience doing that, you also know that you run into the scenario maybe in Q two or Q three, you have changes to your disclosures that you know will affect your 10-K.

#### 4:52

But customers will often wait till a year in to make those changes.

4:56

It's not 10-K.

#### 4:57

Filing time anyway.

#### 4:58

And they haven't rolled the document forward to get it.

workíva

## 5:01

But if you're single source, there's absolutely no reason you can't open up the current version of the 10-K.

## 5:06

For that quarter, make those updates in real time.

## 5:09

So you don't leave all that work for year end, which is typically a very daunting task.

### 5:14

So you can make progressive changes both documents when you know they'll be relevant.

## 5:18

You only have one spreadsheet to really maintain and when it comes to using connections to external systems, you now only have to deal with a chain going to one spreadsheet refreshing that spreadsheet on its scheduled cadence.

#### 5:30

So it's far less maintenance and far more advantageous, especially where connections are concerned to external systems.

#### 5:37

This is the more efficient bill to have, but it's important to know it's not right for every single customer.

It's critical that the customer actually understand what single sources that they have a fundamental understanding of how this linking is done because ultimately they will be the one working in it and maintaining it year after year.

## 5:56

So it is absolutely critical as we walk through the steps of how this is built and how this is done.

### 6:01

That you always bring the customer along for the process.

### 6:04

It's really important that they understand how the build works and I strongly prefer the customer to actively and be involved in the relinking and making something single source.

#### 6:14

It's great experience for them.

## 6:15

It helps build up their understanding and understanding the value of having one source of truth, one spreadsheet that feeds everything about your reporting.

#### 6:24

So I really encourage any partners going through an sec improvement implementation to always include the users, make this very much about training and building skills.

So they can have a really strong experience around single source, from filing to filing in later videos.

## 6:41

I'm also going to cover how to maintain single source and some coaching that can be done, customers will have access to this information as well, but from a partner perspective is really great to have a consultative approach to really help them understand the value of this structure and how to maintain it moving forward after implementation.

### 7:00

So that explains what single sources and ultimately why people do it.

## 7:05

But further context is still needed on how we actually implement this and how we make the changes and go about performing this.

## Chapter 2 How to build single source

## 7:27

So from here, what we're going to look to do is actually open up my 10-Q and my 10-K filing.

## 7:34

So currently I have the 10-Q.

7:36

Open as well as the 10-K.

workíva

## 7:39

In my particular setup.

## 7**:**41

This is a single source setup, meaning both the 10-Q and 10-K are being fed by one reporting file that I have here is my central reporting spreadsheet.

## 7:51

This one spreadsheet feeds both filings all year round.

## 7:56

If I look at the link here for cash and cash equivalents in my 10K, you'll notice that the source is the central reporting spreadsheet.

## 8:05

If I do the same in the 10-Q, I can go to the exact same balance sheet that uses the same link is the same information and see exactly where these particular figures come from.

## 8:15

If I go to my link properties, once again, we see that same central reporting spreadsheet.

## 8:20

It's one spreadsheet that's feeding both documents all year round.

Now, what may come to mind is the fact that you have different time periods that can be reported within the 10-K and 10-Q.

## 8:33

The 10-Q is going to focus not only on year to date columns, but also quarter to date columns.

8:39

The 10-K.

8:40

Typically just needs three year to date columns of information to be reported.

## 8:44

So three years of info is typically what is supplied, whereas the 10-Q may have a current quarter, prior quarter column, current year to date and prior year to date column.

#### 8:54

So as you're going through this build, essentially what you need to do is choose one of the documents that's going to serve as the true starting document and spreadsheet.

9:05

Most common.

9:06

This is chosen as the 10-K filing and 10-K spreadsheet.



## 9:10

The reason being is it tends to have more data and it tends to have more information, more cross checks, more scrutiny.

## 9:16

So if the 10-K is the more built up item, that's the proper file to start with.

## 9:21

And then as you go through the build, you essentially end up reducing the links in the 10-Q.

## 9:27

Basically eliminating all of them and relinking everything from that 10-K spreadsheet.

## 9:33

Once you've done that, you're now essentially single source.

## 9:36

You've taken all the links out of the old tin Q.

## 9:39

It's no longer connected to that old spreadsheet.

## 9:41

And all the links have been coming from this new central reporting file that used to just be the 10-K spreadsheet.

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#### 9:48

Now, some things will need to be added to make the single source you see here as I highlight in my reporting section, the spreadsheet that I have 10-Q and 10-K sections referenced here.

#### 10:01

Sometimes you will need individual notes that are only relevant to the 10-K.

### 10:05

That don't show up in the 10-Q.

### 10:06

Or you'll need separate separate sections built, whatever it may be, it's all easily done within our spreadsheets needs to maintain in one location, you're also going to have a scenario where like with my cash flow, this is one table that really should just be used all year round.

#### 10:22

But for that to work, I need five columns worth of data and we see me highlighting them now.

#### 10:28

What I need is I need three years of year to date data for the 10K and I need that quarter to date for the current and quarter date prior.

#### 10:38

That's why you see these five columns here for my cash flow.

This gives me everything I need from my reporting all year round all in one tab.

## 10:47

So I have all five columns here, ready to be linked, ready to be updated from my trial balance or individual contributors to the cash flow.

### 10:55

It's all here and linked in one location.

## 10:58

This is really the structure that you have to be following as you go through that single source build, it doesn't make sense to have two different tabs for my cash flow, one for my 10-K.

#### 11:07

1 for my 10-Q.

11:08

That's silly.

11:09

And adds two more maintenance.

## 11:10

Instead, I have one tab for my cash flow with all five columns that I could need linked respectively to the individual documents that need them.

That very much is the core activity of transitioning some of the single source.

## 11:23

You have to make the decision of which document is going to be your starting point.

## 11:27

As I said before, the 10-K is certainly the most common.

## 11:31

It usually has more in the spreadsheet, it's more built up.

## 11:34

So the lesser work is to then re link the 10-Q.

## 11:39

The way this works is people go in and you highlight anywhere where linkages currently exist.

## 11:45

So if I go into the balance sheet, I highlight right click and remove those linkages.

## 11:49

And then I start building those links from my central reporting file.

## 11:53

Just linking everything up from one source of truth.

workíva

## 11:55

The individual cells that have that cash and cash equivalents need to be linked up from that former Tin K spreadsheet.

#### 12:03

So you need to make sure to do that for the numerical values as well as the dates we want to automate as much as possible.

#### 12:09

And you never want to forget about the dates aspects because that's incredibly helpful to link up and continue with our linking technology.

#### 12:19

So that's really what the transition looks like.

#### 12:22

Those are the core conversations that you need to have with the customer around which document to choose.

#### 12:27

It's very possible.

#### 12:28

They want to make this transition mid year and they made massive changes to the 10-Q spreadsheet and document.

They may want that to be the basis of their single source model where you're unblinking the 10-K.

### 12:39

Because they anticipate making significant changes.

#### 12:42

There's certainly nothing wrong with that.

#### 12:44

It's just an important conversation with the customer and see where their comfort level and which spreadsheet they would like to make single source.

#### 12:51

The other elements of this that I really encourage for anyone doing a single source transition is make sure to include the customer, go treat it as a training, as a skill development exercise in a consultative fashion, where you show them how you're doing the linking, how you're connecting at the specific spreadsheet, the customer knows their documents better than anyone else could even hope to.

#### 13:14

So they are far more efficient and actually performing this linking as long as they're trained and given the proper support, they really should be coming in here and helping this build.

#### 13:24

It shouldn't be purely on the partner.

This is a great chance to build skills for the customer as long as they get some guidance or showing how to do this linking and how they should be thinking about it.

### 13:34

They're typically capable of doing so.

#### 13:37

If they are unwilling or uncomfortable contributed in this way, it's possible they may not be a strong fit for single source because ultimately, once you leave the engagement and all the building is done, it's still on the customer to maintain this.

### 13:50

And if they don't have a keen understanding of it and they don't know how the linking works will have a hard time maintaining it and expanding on it on their own to get the most out of the product.

14:00

So please take that enablement approach.

14:03

Keep them included.

#### 14:04

Let them contribute build some notes, link up some of the statements they're going to see and understand this quite easily, as long as they're given the chance to do so as far as why you transition a single source and how you do it, the approaches that you take, that's everything that I wanted to discuss on exactly how you go through this transition and the things that should be top of mind as you do.

So the next video is really going to going to focus on how you maintain single source.

## 14:32

Moving forward quarter after quarter filing after filing.

### 14:36

What are the important things to keep in mind and why do you need to structure in a certain way to maintain the particular build?

### 14:43

I hope this has been helpful and look forward to going over the other context.

14:46

In the next video, thank you

## **Chapter 3 How to Maintain Single Source**

## 0:01

Hello, my name is Jake acres and this particular video is focused around how to maintain a single source build, filing after filing in my particular demonstration account that you currently see on my screen.

0:14

Now I have a single source structure and I have it properly set up to be utilized moving forward after every single filing, what you'll notice is I have my central reporting spreadsheet here, it is pretty much the only meaningful spreadsheet in this filing folder.

I have a folder dedicated to my sec filings.

## 0:34

This encompasses everything from my 10-K, 10-Q my eight K s earning scripts, whatever is linked up is all hanging out in this one folder.

## 0:45

This is absolutely critical to maintaining a single source build For the linking to stay together for all of these documents when you roll forward after a filing period, they all have to be rolled forward at the same time.

## 0:59

So it's important to keep everything in the same folder as I go from my Q1 filing to Q2.

## 1:06

It's important understand that the way I do that is by taking this particular folder and copying it, essentially making a duplicate of all this content.

## 1:15

This way I can historically freeze the prior filings so they can never be altered and never be changed based off of all the final figures I made to available to the public.

#### 1:26

This allows me to maintain all the linking and keep everything together.

## 1:30

If you do a roll forward with only the 10-Q or only the 10K and the spreadsheet, it's going to break the rest of the linkages for all this connectivity to stay together and stay single source, everything needs to be rolled forward together.

## 1:43

So proper folder structure is very, very important.

## 1:47

This is an important teaching moment and very important to supporting single source and making sure the customer doesn't undo all of the work to get them to this one source of truth set up.

## 1:59

So that particular structure around folders is very important to ensure they have a good experience and that the single source linking is maintained.

## 2:08

This will allow them to have this roll forward whereas they start in Q two.

## 2:13

The first revision of the 10-K will be exactly where they left off in Q one.

## 2:17

This is great for black lining because they can do a black line to compare what the filing look like in Q two compared to Q one.

## 2:25

How different are the numbers, how different are the notes?

It's a tremendous starting place for them to do those black lines and get insight into how they're performing and what they're trending and doing within the particular platform.

## 2:37

It's also important because the 10-K has a copy here that we could utilize if something changes in my disclosures that would also affect the 10-K filing, I should just open that up and make the change.

## 2:48

It's a live document, certainly not what I plan to file now, but if I think these changes are going to be relevant for that annual filing, why wait until year end or I'm a little fuzzy on the details and don't really remember what I need to do.

### 3:00

Let's just do it in the moment and maintain this all year round.

#### 3:04

The same is true for anything that should be connected to the sec filing data, it could be an earning script, it could be an earnings presentation, my proxies and a Ks, whatever it is, if it's linked to this one single source spreadsheet, it needs to stay together for every single roll forward.

#### 3:21

This is a very basic coaching moment, but it's very critical to maintaining this long term and having success as a single source user.

#### 3:30

So keep everything together, keeps your links happy, keeps them working and keeps this extremely efficient build intact.

## 3:37

It doesn't take much coaching but it's important to make sure to go over this with customers to ensure they understand how to roll forward their projects, how to go from quarter to quarter to make sure they keep all of this together.

## 3:49

I hope this instructional has been helpful.

## 3:51

The core focus is about how to maintain a single source structure and ensure that all the linking stays together all year round year over year, quarter over quarter filing the filing.

4:03

Thank you for your time

## The purpose of dates Sections

0:01

Hello.

0:02

My name is Jake acres and the focus of this recording is around maintaining the date section and the importance of having a date section in a single source set up within w desk from a partner perspective.

It's important to know that when you go into an account you should always see a date section within a spreadsheet.

## 0:23

Just as I have here, I'll highlight now.

### 0:26

My very first tab is dates and general information.

#### 0:30

Days are one of those things that no customer should ever spend any time manually changing or updating.

#### 0:37

There's no reason to not have all the work done by our formulas and links.

#### 0:42

There are a great deal of different dates that could be referenced in the document, whether someone's on calendar, off calendar.

#### 0:51

What we see in this particular tab is I have every iteration and possibility of date structure for my current year, prior year, quarter to date.

#### 1:00

Anything that can be used as all referenced here and formulated driven.

If you ever encounter a customer that is manually updating dates or doesn't have a date session like this, you should really direct them to the marketplace to download this particular file that they can apply to their single source spreadsheet and start linking up the dates that we have formulated driven the real value here is there's no reason to spend manual effort around this.

## 1:27

This is something that should be completely automated all year round quarter to quarter filing.

## 1:31

The filing.

## 1:32

So if you encounter a customer is not utilizing this properly.

## 1:36

This is a simple efficiency that can really make a difference in their quarter to quarter process in my example here, there's only one thing that I really need to change to update my dates from a 10-K.

1:48

Q four filing to my 10-Q.

1:51

Q one filing.

## 1:52

And that's to change the quarter of report.

## 1:54

That's currently my focus.

## 1:56

It was Q four, but now I'm going to change it to Q one.

## 2:00

The only cells I should be changing are these blue ones.

## 2:03

And once I make that change, we see the formulas all update going from december to March because that's the current period that I'm now reporting in.

## 2:13

If we go to some of the sections of the spreadsheet, we're going to see that they also similarly are reflecting changes in March.

## 2:20

This is something that always should be automated and people should always have access to these date sections every once in a while, you will encounter a customer that may be on boarded long long ago and never really set up the date section or deprecate it.

## 2:35

For some reason, if you ever encounter someone that's doing anything manual related to their dates and their tables and their text wherever maybe in their filings, it's very important to point out this efficiency and start building towards the set up around the dates being automated.

## 2:51

This is just a simple efficiency in WDS that saves a tremendous amount of time.

## 2:56

It's not common.

## 2:57

You will see customers not utilizing this at all.

## 3:00

But it's always good to have top of mind that this can all be completely automated.

## 3:04

It should all be linked and formulated driven and anywhere the dates are referenced, whether it's in a table or in text, really should be linked up to as many of the individual sources as possible.

## 3:15

These linkages are very common and they are used everywhere in my document, especially when you're single source, you're rolling the dates in both the 10-Q and 10-K at the same time.

## 3:26

So they all should be driven off of the dates tab anywhere where possible.

We have all kinds of different formatting options there to fit any kind of display that is needed for the document.

## 3:37

So I highly encourage if you ever run into a situation where the spreadsheet doesn't have a dynamic state section.

## 3:42

As I'm showing now they're available in marketplace in a simple template to just copy and paste and apply using the formulas and starting the link.

### 3:51

It's very, very simple to use.

## 3:53

But it's one of those efficiencies that we want to make sure every customer has in WDS.

#### 3:58

So if you ever encounter is not being used in the way that I'm showing.

#### 4:01

It's a great easy, simple win for a customer to automate everything about their dates and all of their filings with just a few simple input cells that I'm showing here.

## 4:13

I hope this contest has been helpful around the purpose of a date section.

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## 4:16

Just how important and valuable it is for customers to have this some of them just simply don't know that these options exist and and something like this is here.

## 4:26

If you ever encounter a situation where they don't have this content, it's very easy to apply from marketplace and start linking up.

## 4:34

It's a situation where the customers very much can do this linking on their own.

## 4:38

It's very straightforward.

## 4:40

A lot of times you're copying pasting this Same day over and over for current prior period.

#### 4:45

I personally like to work through a document doing the same copy and paste everywhere.

## 4:49

I know the current period needs to be applied, then I'll go and do the prior period everywhere needs to be applied that way.

I only have to control C1 time and I'm just doing a control v over and over and over again everywhere.

## 5:01

Those dates need to be used.

## 5:03

It makes efficient to set up doesn't take a lot of time, but it makes a really significant difference in the quality of life and rolling projects forward.

## 5:11

Hopefully this has been informative and understanding the importance of having a dedicated date section.

## 5:16

Why it should all be formulated driven and linked to give the best automated experience for a customer, especially once they become single source.

## 5:24

This only needs to be set up one time and linked one time to the relevant documents.

## 5:29

So it's important to make that effort just this once to get those benefits for years.

## 5:35

Within the filings utilizing the platform, I hope this video recording has been helpful and thank you for your time.

## Other usage in a SEC workspace

0:01

Hello.

0:02

My name is Jake acres and the purpose of this video is to walk through the additional content that makes sense to bring into our sec filing solution here at CUBA as you work with a customer and you're evaluating how much they utilize the platform.

## 0:18

It can be helpful to know just how much really can be done with the sec filing solution.

## 0:24

Of course, any of the filings that they're doing should be in the platform, their exhibits, you know, they're a Ks, there are these releases, those all should be held within our platform but it's also good to know that you can use it for other items that are heavily reliant on the sec filing data here within my particular folder.

## 0:46

We do see some additional content that I have built in here that I like to utilize my linking to really automate the compensation committee deck that we build up my earnings call scripts, earnings presentations are all things that are heavily reliant on the data and information that I house here within my sec filings.

1:08

I don't file this content.

workíva

## That is true.

## 1:10

I don't send you to the SEc but it's all reliant on the data.

## 1:13

Already loaded my single source spreadsheet.

## 1:15

So why not build these things and just utilize the linking that much more.

## 1:20

The conversation committee content that I have here is really built as a document but it's styled as a presentation.

## 1:27

So I have it in the dimensions of slides as we scroll through any of the information I have here is all linked up.

## 1:35

Not only do I have the dates and figures linked, but any graphs that I use are also linked up as I right click and go into chart data.

## 1:44

This chart is built just like what you would expect and Excel.

workiva

There's just a table behind it that I've linked the individual values.

## 1:50

So when I update that single source workbook related to the compensation of the executives of the company, it updates this deck as well.

### 1:57

It's the same data, it's the same content.

### 1:59

Why not just automated and bring this linking that much more value to the customer.

### 2:04

This very much is something that a lot of customers just don't think about.

#### 2:07

Sometimes it's very true for earnings presentations as well, which I'm showing currently.

## 2:12

Now sec customers do have access to our presentations and this is one that does make sense for them to do in W desk mostly because this can be a pretty detailed presentation for them with a lot of graphics and contextual information around the company's performance.

## 2:28

So when people are building up these particular tables, any graphics they have or even just the text explaining the trending like increase or decrease for their performance in the quarter.



## 2:41

There's no reason that shouldn't be linked up and automated earnings per share and other data points are already in W desk.

## 2:47

Why not just automate more and utilize the linking that much more.

## 2:51

It's all inclusive of the existing solution.

## 2:53

So there's no harm in using this way you just get more value out of the investment and more out of using W desk.

## 3:02

Another item that can sometimes be very pressing is the earnings call script that can be utilized by the Ceo and CFO.

## 3:12

The reason this can be more critical is because it can be a very timely discussion where numbers could still be evolving updates still being made.

## 3:22

It's even more reason that you should be linking up the values of the call script to make sure any figures that are being discussed on that earnings call are accurate and tied back to the sec filings.

workíva

## 3:35

There's already a great amount of scrutiny on the sec filing so there's no reason not to link up the figures to the script that may be referenced on this call.

3:43

It ensures accuracy, completeness.

## 3:45

And if anything changes late before the call happens, it's going to flow through.

3:49

Thanks to our linking.

## 3:51

So if any script exists like this today, it really should be built in w desk to make sure is complete and accurate.

## 3:57

Of course we would love for people to log into the system and actively use WDS during these calls.

## 4:03

But if they prefer to do things offline always keep in mind, you can save the script down as a pdf and distribute it to the executives that way.

## 4:11

It just makes more sense to build in a more automated fashion.

workíva

## 4:14

That's a little safer.

4:15

Especially with any late changes.

## 4:17

We just wanna make sure those fall through and we don't have any discrepancy on what's being reported to the public and what's being said on these earnings calls.

## 4:26

Once again this is just inclusive within the application the customer already.

## 4:30

And it's one of those items that people don't always consider because it's not an actual filing that they're building that it sure is relevant to their sec solution and their sec work.

## 4:41

So if this is something that we can help automate and make for a better experience for the customer, it's one of those additional resources that could be a value to them.

## 4:49

So from a consultative perspective always give in mind.

## 4:53

It's not just about the filings.

## 4:55

There could be other items that make sense to link up this data, especially once you build a single source structure, you only have to link these earnings call scripts to one spreadsheet.

## 5:05

If you're not single source then you would have to link up the earnings call script to attend que spreadsheet and a 10-K spreadsheet.

## 5:13

Things could change over time information can move and you could certainly have discrepancies and you have to maintain and build things twice.

## 5:20

No one really likes doing that.

## 5:22

But if we're single source, it now makes sense to build this one earnings call script that's going to be used every quarter that's linked to the spreadsheet that I work in quarter and quarter out.

## 5:32

It just builds more synergy and makes a lot more extensive to expand the usage.

## 5:36

So hopefully through this discussion, you see the value of utilizing W capacity.

You have a better understanding of some of the additional content than sec filer could be building within our platform, especially as they make the jump to single source items like this, start to make a lot more sense to use.

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5:53

So hopefully this has been valuable for your time.

5:55

This could be good information for customers just to broaden their horizons on just how much they can do and automate with W desk.

6:02

Thank you for your time.

6:03

I hope the video has been helpful.

## **Market Place Resources**

0:01

Hello.

0:02

My name is Jake acres.

0:03

And the purpose of this recording is just to talk about the resources available for our partners that are working through an sec improvement implementation with some of

our customers here at work Eva it's really important to utilize your resources just to be efficient and build.

## 0:17

And the core purpose of this video is just make you aware of what's out there on our marketplace for you all to utilize as far as templates and inspiration for the builds in the very bottom left of my screen where you can see my highlight, you'll see a marketplace icon.

### 0:32

This is always available for anyone who has a W desk account.

### 0:35

All you have to do is click into that marketplace and you'll start to be able to see individual templates that any customer or partner can utilize to get started or for inspiration in building something.

#### 0:47

The rounding template is certainly a popular one, but there are others that can be very helpful up here in the search bar.

#### 0:54

I like to search for dates here just to give people an idea of the different date templates that we have out there and accessible for our partners or customers to use.

#### 1:04

There are two major date calendars that people could utilize the off calendar reporting dates template.

This one is very important for you guessed it Off calendar filers, it makes the dates a lot more malleable to different quarter ends.

## 1:18

Sometimes they're very random for a customer or it could just be one of those retail off calendar filers having this at your disposal.

1:25

Be very helpful.

## 1:27

Of course we have the traditional dates template as well.

## 1:29

This is for an on calendar filer who has traditional quarter ends.

1:33

This is very easy to apply as well.

1:36

Both are valuable.

## 1:37

And if you run into a customer that lacks some of these things, these templates are immediately accessible for everyone and free to download and apply to the space.

If you click into the off calendar reporting dates table, there's going to be a brief description of what's included, why to use it, how to apply it.

### 1:55

But most importantly, all you have to do is click the add to workspace button and it will literally add it to the customers workspace that you're working in and have access to.

#### 2:04

You also could download this into your workspaces as a partner in production and then you can download these files offline and have them stored and upload them whatever cadence you want on engagements that you're working.

## 2:17

Knowing these resources are here within the marketplace is really just a helpful value add to any implementer.

#### 2:22

So you don't recreate something that's already made and easily applied the dates and rounding.

#### 2:28

Our major focus is in that the marketplace will continue to grow and expand.

#### 2:33

So it's very important to come into here, you know, in different times, see what's new, see what's available and stay up to date on all these wonderful resources that are being built by our personnel here at where Kiva and being shared by our other partners.

We expect to have a lot of investment in this area.

## 2:49

So I just wanted to be certain everyone knew it existed.

## 2:52

Everyone knows how to navigate it, how to use it and stays up to date on all the wonderful content here that can make delivering on improvement processes a lot easier and faster.

## 3:02

I hope this has been useful time.

## 3:04

I really want to focus on what marketplaces, why it's valuable to you and why?

## 3:08

It's important to stay up to date on what's here.

## 3:11

Just so you have the best of the best for any implementations that you're working.

## 3:15

Thank you for your time.

## 3:16

I hope this video has been helpful.

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