# W for ESEF | Getting Started Quick Guide

## **Access & System Requirements**

The admin listed on the contract will receive a welcome email from Wdesk with the username and password to log in. If you haven't received it after 3 days from the signature date or if you are having trouble logging in please contact <a href="mailto:support@workiva.com">support@workiva.com</a>. The subsequent users will be added by the admin.

Visit the <u>System Requirements</u> and <u>IT Network Setup Guide</u> on the Success Center in order to ensure smooth access to Wdesk. This link contains important information for your IT Team, such as IP Whitelist.

## **Workiva Support Center**

**Help** - step-by-step articles and videos to help you along the way. You can then search or browse to find additional articles by topic. Other relevant sections for W for ESEF are <u>Tables</u>, <u>Charts</u> & <u>XBRL</u>.

#### **Getting Started**

- Intro to Workiva
- Intro to Workspaces
- Find Members and Admins

#### Wdesk Home

- Using Folders
- Create Folders
- Update File Permissions
- Advanced Permissions
- · Copy a File or Folder

#### **Admin Roles**

- Organization Admin
  - Organization Settings
  - Add a New User
- Workspace Owners
  - Invite Members
  - Workspace Roles
  - Change a Member's Role
  - Use / Manage Group

#### Working in Documents

- Intro to Documents
- Document Outline
- Edit / Use Outline Labels
- Real Time Collaboration / Active Users
- Revision History / Milestones
- Track Changes / Blacklines
- Comments
- Linking & Publishing
- Export a Document

**Learning Hub -** your online training platform. Take self-paced courses, from introductory to advanced.

## **Accessing The Learning Hub**

Once you're setup with your Workiva account, you can access the Learning Hub through the Support Center by choosing the purple question mark in your Workiva account. If you would prefer to access the Learning Hub via a web browser navigate to <a href="www.training.workiva.com">www.training.workiva.com</a> choose "Login" and then "Sign in with SSO" at the bottom of the registration page."

#### Recommended Collections

(to locate them in the Learning Hub simply search for their names)

- Getting Started
- ESEF Getting Started
- Administrator
- Wherever Whenever Series
- XBRL/iXBRL

Workiva Community - interact with others, ask questions, share tips and tricks, and connect with Workiva.

- Wdesk release notes are available on the Community and you can also subscribe to get email notifications with regular updates on all the new features that are being added <u>here</u>
- ESEF Topic to 'Follow' in the Community: ESEF Q&A and Info

## **Workiva Support**



In-house Support Team 24/7 Availability
Global Phone Numbers
support@workiva.com
In-App Support Chat

### **Other ESEF Resources**

- · Have a Great ESEF Submission
- ESEF Readiness Kit
- Workiva ESEF Resource Library
- Designed Reporting Guidelines & Export for InDesign
- Working with Design in the ESEF

