

Import Demo - Factbook

In this video we will cover sample reporting outputs for an ESG ready to publish after collecting your data, aggregating data, mapping data, centralizing in the factbook and some of the process of iteration as part of the report creation. We start off by first taking a look at our document interface where we have a sample ESG integrated annual report, which has a breakout of sections and content that might be applicable to a reporting team. All of this is fully editable, if we need to insert sections, nest them and delete them with the canvas of the document, allowing full collaboration with multiple team members being able to contribute to each specific section if they have the permissions to do so. In this interface, you'll notice that it's very user friendly, we have a ribbon and general guidance that you would be used to in most page layout tools, but also offers the functionality of saving and consuming this information in both PDF, DOCX, indesign, HTML, even with the flexibility of exporting only specific sections to that extent and also advanced exports in terms of those options, if you do need to share this out or socialize the information as part of that early review process. We do want to highlight the Workiva specific functionality of linking and how it ties in with preparing data for the reporting outputs. As we look at the sample section of the greenhouse emissions with a chart and a table breakout, you'll notice the top left hand green triangles that they know destination links in this example. If I were to attempt to change any of these values, I would get a prompt to go to that source. If I follow this source by clicking the go to source instance it will take me straight to that cell. The cell is selected in the 18.2 and any cell that has a top left hand blue triangle is a source. A source can have multiple destinations but there can only be one source like location and this ensures data governance, fidelity and the audit trail across any kind of changes. For purposes of this example, let's also see where else this information is being consumed. If I go to the link properties, I can follow my presentation for the admission summary and what I see here is a presentation interface very similar to the document or any other presentation suite where I can click in make changes and edits on what I would like to be visible for that canvas. The content here is also links. All these values cannot be changed but I will go back to the source and just update one of these values by removing this factor of one. We now see the value toggle to 17. This will highlight that there is an unpublished change, by that change in value and if I then proceed to select publish my links, I will see the value of 18 become 17 in any location that is consuming via a destination link. We'll also highlight that this chart is linked, so if we right click and view the chart data, we'll see that the value 17 is also part of that 2020 year and this is reflected in the value of the chart when we hover over and see 17.2. We also wanted to highlight how to add additional information from your fact book or anything that you would like to highlight as part of a reporting output. If we navigate here to a sample, just content index table will notice that this table is also populated by destination links that have their social location in a different section of the fact what we want to highlight here is the ability to also consume information from a destination. So if I copy this whole block and you'll see it highlighted and we're copying with control C I can then go to my presentation or create a new slide, see a blank canvas and paste that content in. In this process will notice that the table brings along its

formatting and destination links. These linked values are the same at the source location and I actually have the flexibility to also modify this table in the presentation by inserting or adjusting it as I see fit if I go to this destination link and maybe I want to bring in a prior year data center from a prior column. It will take me to that location in the factbook where I have that break out of the table information for this employment data. But I also want to bring along My 2019 responses. So I'll just select my block of cells that capture those responses that I currently have available and I will populate them in the column that I had proactively inserted. I will select to create links and for now select all cells but I will keep the formatting and I'll set actually these options as default in case I need to insert potentially other cells in the same structure. What we'll notice here is that the values that are included are now linked to that source spreadsheet. But I actually want to also leverage some of the formatting. So I'll use this design. I'll use my format painter, apply it to this Section here from the 2019 response and actually just make sure this is relayed with that same blue font and that same size on the Adelle sans. If I also wanted to ensure that the formatting was consistent across maybe the cell blocks, alcohol, select an adjacent cell And apply to the next one as well. So now we've quickly walk through and highlighted the different export options that are available for both presentations and documents, whether they're in pdf power point or and also consuming and updating publishing link information in any which of the sample reported outputs. Both are available to be collaborated with the whole core team or even a design firm or agency or maybe a professional services firm. What we want to highlight in terms of functionality, is after the team has collected their data collection information, centralized that information in the factbook staged it as they want to report on. They can then segue and iterate over the process across the document and presentation to share out that information.