

Discover Workiva Documents

Overview

In this lab, experience using Workiva Documents in your own Workspace environment. Practice what you have learned in the course, validate your work and by the end of the lab, confirm accurate completion.

Pre-Requisites

- ✓ Must be a workplace owner or editor to import file for lab
- ✓ Must use included zip file from the Learning Hub to complete this lab

Procedures

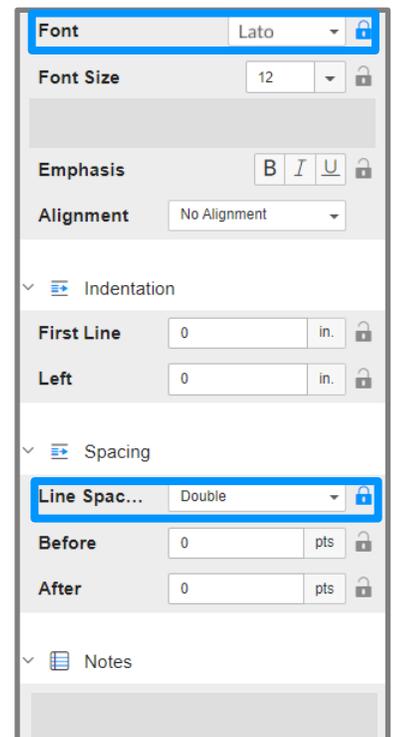
Step 1: Create a Style Guide

Within the Workiva platform, custom style guides can be created. Style guides can be exported and copied into documents for uniformity. Let's begin by customizing your document's style and quickly create a sophisticated look.

Note: You need to be the document owner to make any style changes.

1. Select **Edit Style Guide** from the **Styles** dropdown menu on the Edit tab
2. Choose  **New Style**
3. Select **Custom** from the dropdown
4. Name your new style
5. Click 
6. Use the right-hand panel to make the following edits:
 - a. Font: *Lato*
 - b. Line Spacing: *Double*
 - c. Click the  next to the above attributes so they can't be edited
 - d. Select  to apply any changes

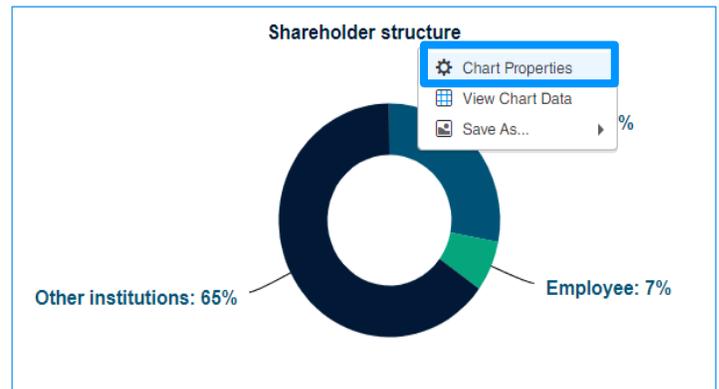
TIP: It may be helpful to use a split screen view to see the changes being made.



Step 2: Dynamic Charts

Now that you added a unique style to your document, let's update a chart to present the data clearly and professionally. Charts will not only enhance your document, but give your document a more visual appeal.

1. Select **Market Results** in the Financial Review section of the outline
2. Click on the **Shareholder Structure Chart**
3. Right-click on the chart and select **Chart Properties**



4. Make the following changes to the Chart Properties:
 - a. Update the title to **Shareholder structure 2020**
 - b. Change the Doughnut Hole to **0**
 - c. Turn on **Explode**

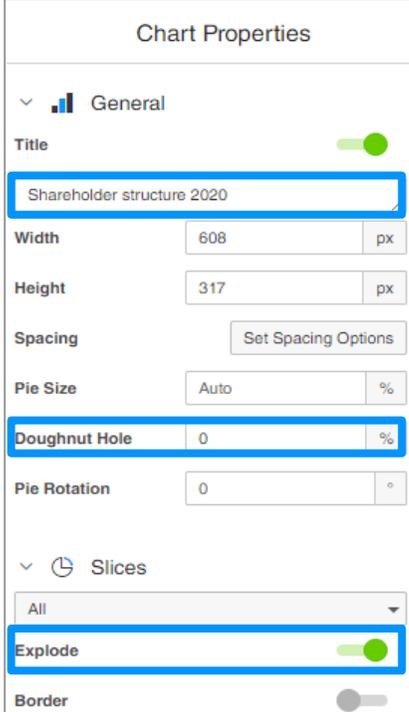
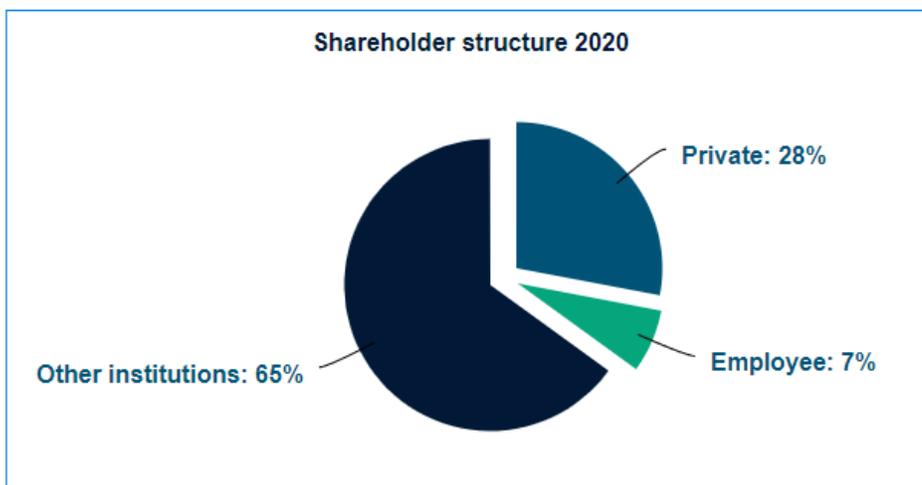


Chart Properties dialog box showing settings for the "Shareholder structure 2020" chart. The "General" tab is active. The title is "Shareholder structure 2020". The Doughnut Hole is set to 0%. The Explode option is checked. The Slices dropdown is set to "All".

Property	Value	Unit
Title	Shareholder structure 2020	
Width	608	px
Height	317	px
Spacing	Set Spacing Options	
Pie Size	Auto	%
Doughnut Hole	0	%
Pie Rotation	0	°
Slices	All	
Explode	<input checked="" type="checkbox"/>	
Border	<input type="checkbox"/>	

Your chart should now look like the following:

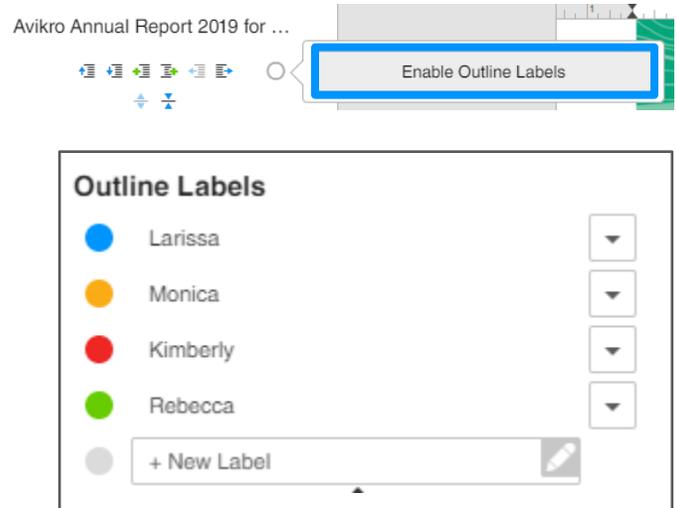


Step 3: Outline Labels

Now, that you have made changes to your style guide and chart properties, let's enable and add Outline Labels. This is most helpful if multiple people or groups are working on the same document, and also allows you to easily spot pertinent information.

Note: You must be the document owner to activate labels.

1. Click the **Outline Label**  icon on the right side of document outline
2. Click **Enable Outline Labels** to add the default labels
3. Rename the Labels
4. Select the **outline label**  icon next to the **Market Results** section and type in your name
5. Assign the other labels as well

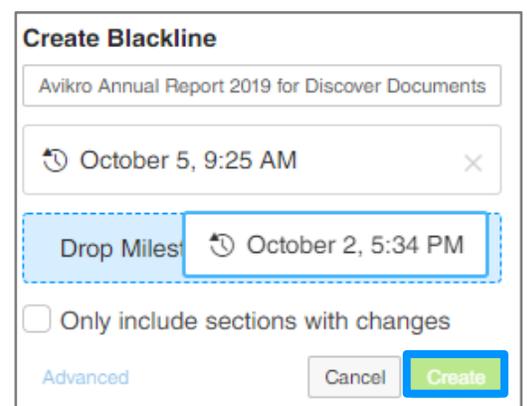
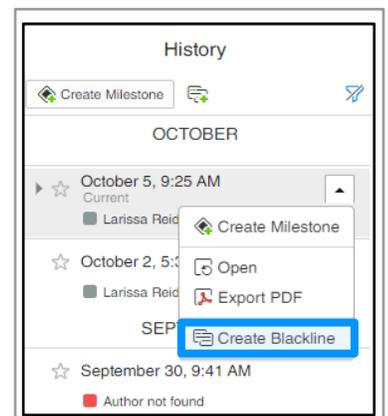


Step 4: Blacklines

Each time you or someone else edits the document, a revision will show in the History panel. To compare those revisions, we can create a blackline to easily view the changes that have been made.

7. Open the  **History Panel**
8. Click the dropdown next to one of the revisions and select **Create Blackline**
9. Drag another revision to the **Drop Milestones and Revisions Here**
10. Click **Create**
11. Select **Open** from the dropdown

A new tab will open showing just the section(s) with changes. In the document you should see text in **blue**, showing content that has been added and in **red**, showing content that has been removed or no longer exist in the document.



Step 5: Send for Review

Sending documents for review allows others in your workspace to view and comment on particular revisions that have made. The Send for Review document is a read-only version and any changes made to it, does not alter the original document.

1. Click back into your original document tab
2. Select the Review tab in your document
3. Click the  icon on the menu
4. Select **Send For Review** from the dropdown
5. Type in **Discover Workiva Blackline** for the Review Title
6. Type and Select your name in the **Add Reviewer** field
7. Select **Send Email Notification**
8. Enter **Discover Workiva Blackline** for the **Subject**
9. Click **Send**

You should now receive an email and link to go directly to the review you created.

Send Blackline for Review

Send a view-only version of this blackline or its sections to others for review. [Learn more](#)

Avikro Annual Report 2019 for Discover Documents blackline

🕒 September 28, 2020 4:05 PM

🕒 September 30, 2020 9:03 AM

Include all comment threads from September 30, 2020 9:03 AM

All comments in the blackline and from past reviews. New replies will carry forward into the review.

Send entire blackline

Send selected section(s)

Details

Discover Workiva Blackline

Larissa Reid ✕

Send Email notification

Discover Workiva Blackline

Message (optional)

Cancel **Send**