



Demo Storyboard

Introduction to Wdesk 100% Cloud Based

Introduction to Wdesk 100% Cloud Based	What to Show	
	1. Log in to Wdesk home page 2. Hover over each document type (Doc, Presentation and Spreadsheet)	
	Talking Points	The Value to the Customer
	Access anywhere, anytime; always working on latest version of platform	User friendly interface enabling faster onboarding and easy adoption
	100% cloud based platform with document, presentation and spreadsheet capabilities	Centralized and controlled document repository; reducing exposures to data loss and departmental silos
	Configurable dashboard	
	Enterprise cloud security with granular permission user based access	Enterprise security and control with full audit control and tracking of documents and users
Files and Document Editor	What to Show	
	1. Open files from landing page 2. Open Avikro Annual Report	
	Talking Points	The Value to the Customer
	Single central repository for your reports	Eliminate the need to access multiple share drives to access the data
	Configurable structure and granular based permissioning	Store all dedicated documentation in one central place
Org will still have control over who can access what documents	Structure the report to fit the needs of the finance accounts team	



Demo Storyboard

Centralized Preparation for Annual Reporting

<p>Centralized Preparation of the Annual Report</p> <p><i>Key: Everyone in the organization in one document.</i></p>	What to Show	
	<p>Collaboration: Multiple users in one document</p> <p>Permissions</p> <p>Track changes and review process</p> <p>Commenting, tasking and workflow labels as tools to organize preparation work</p> <p>Audit history: Blackline as a powerful review tool</p>	
	Talking Points	The Value to the Customer
	<p>Wdesk allows group, user, and role-based access at document and section level; managed by business users without IT involvement in real-time</p>	<p>Granular control reduces exposures of critical information to unauthorized personnel</p>
	<p>Multiple users work concurrently on the same version with full transparency; Ability to grant internal and external user access by section or by the entire document in real-time</p>	<p>Centralized document ensures your team is always working on the same document in real-time, eliminating the need to combine documents and comments after edit and review</p>
	<p>Track changes, blackline, and comments establish a workflow on each document</p>	<p>Real-time full audit trail to see exactly what changed, when, and by whom</p>
<p>Easily collaborate with co-workers using directed comments; manage workflow with tasking</p>	<p>Eliminates the challenges companies face around manual collaboration and version control issues; reduces time spent on version control, document management and risk of errors in final reporting</p>	



Demo Storyboard

Managing Data

Managing Data - Trial Balance and Spreadsheet Linking	What to Show	
	Links in table (PnL); navigate to source spreadsheet Introduce spreadsheet functionality and main features Explain data integration; explain how TB data is mapped to tables via cross sheet formulas Linking example making a change to revenue	
	Talking Points	The Value to the Customer
	Charts and tables are live and dynamic, embedded into the document; scale linking to multiple destinations	Wdesk decreases risk of inconsistent data and human error throughout reporting; ensures accuracy and consistency and reduces the effort when making changes
	Full visibility into all usages of the data point across all spreadsheets, documents and presentations	Real-time insights lead to faster, better planning and business decisions
Wdesk offers direct import and export capabilities as well as an API and pre-build connectors	Data flows in connected systems; linked data within Wdesk gives customers confidence in the accuracy of their data; imports happen directly from source systems to eliminate manual entry errors; automated refresh ensures up-to-date data	



Demo Storyboard

Audit Trail

Complete Audit Trail	What to Show	
	Publish changes and open history panel (multiple revisions; multiple people) Add milestone Create and open Blackline Send for review (Comments and Tasking)	
	Talking Points	The Value to the Customer
	Report is saved every 5 minutes; add milestones to mark critical revisions of the report	Complete visibility into all changes and updates; no risk of losing work
	Revisions track all modifications; provide a detailed and complete audit trail of who, what, when, and where changes have been made	
	Wdesk publishes changes to single active document and any linked documents; instantly elevates all users to the current revision	Reduce time spent with auditors and audit fees allowing for faster review cycles
Full visibility of all changes throughout the reporting period; compare and review any two revisions of a document to see exactly what has changed		