Discover Workiva Spreadsheets

Overview

In this lab, experience using Workiva Spreadsheets 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

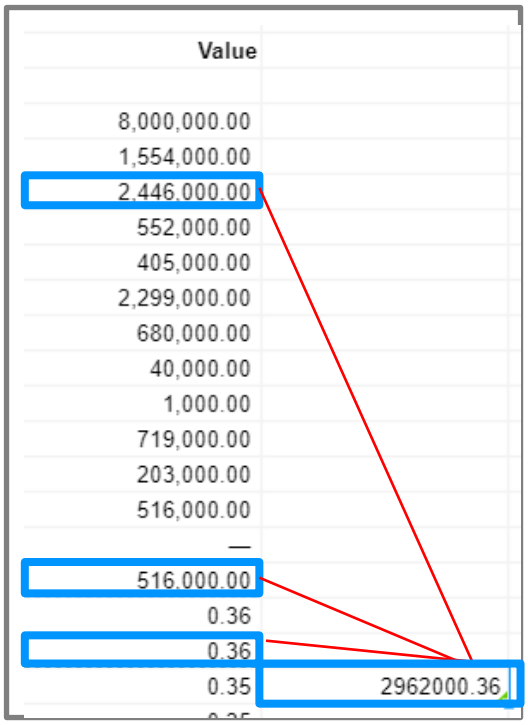
Procedures

Step 1: Formulas

With Formulas, elevate data and execute automatic calculations easily and more efficiently. Begin by creating a SUM formula.

1. From the Outline, *select* **Sync**, and the **Trial Balance** sheet
2. *Click* cell **F21**
3. *Type* **=SUM**
4. *Select* **SUM (number1, number 2,...)** from the dropdown
5. While holding down Ctrl, *select* cells **E7**, **E18** and **E20**
6. *Hit* the **Enter** key and this will add up the selected cells

If the value in those cells are ever changed, the total will automatically update.



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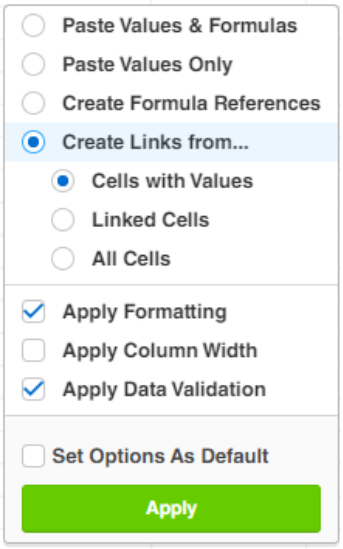
Step 2: Link Creation

Next, practice creating a link. Linked data can be efficiently shared by updating one source of information. The data will be consistent across all documents.

1. *Select* **Trial Balance** below the **Sync** sheet from the outline
2. *Select* cell **E7**
3. *Right-Click* and *select* **Copy**
4. In the Outline *select* **Sheet31**
5. In any cell, *right-click* and **Paste**
6. *Click* the to choose linking options
7. *Select* **Create Links from… Cells with Values**
8. *Click* **Apply**

You should now see *indicating your cell now is a Destination Link.*

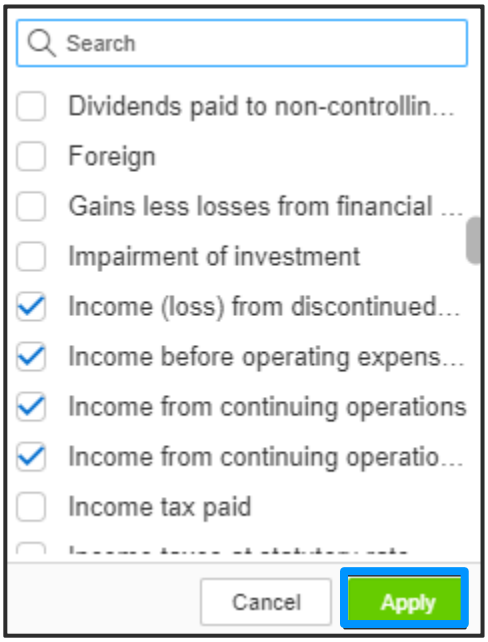


Step 3: Filtered Views

With filtered views, quickly find the most needed data. Data can be organized for easy viewing and be reused for as long as needed.

1. From the Outline, *choose* **Sync**, then the **Trial Balance** sheet
2. *Select* **row 3 – 129**
3. From the Data tab, *select*
4. *Choose* **Create View**
5. *Select* next to Description in cell 3C
6. *Uncheck* **Select All** and make the selections shown
7. *Click* **Apply**

Your spreadsheet should now display six lines of data. You can name and save this view for later or Exit when finished.



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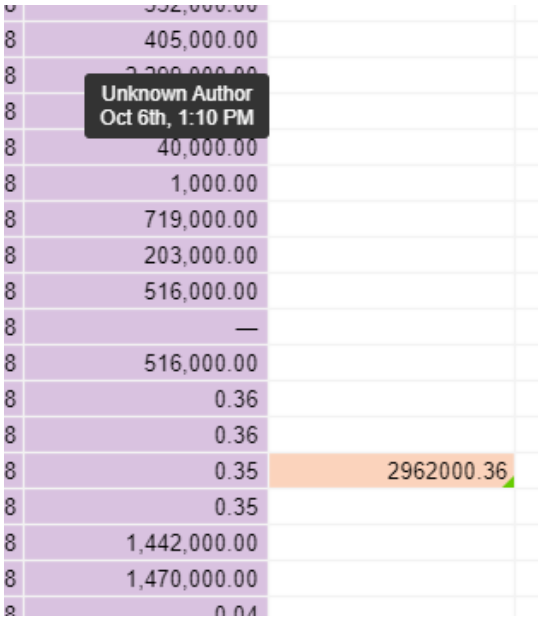
Step 4: Authorship Overlays

Now that changes have been made, use Authorship. With Workiva, several people can work on a one spreadsheet. Using Authorship, quickly spot which collaborators made changes, or who is actively working by the cell outline color.

1. Click on History panel
2. Toggle the Authorship to the on position

Your spreadsheet should now show two colors reflecting what existed and what was added by you in this lab.



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