Using SEC

Description

This online self-study class provides you with the necessary information and resources to utilize the Workiva Platform for SEC reporting. After completing this course, you will be able to apply these common practices to your SEC filing cycle. This course includes review activities as well as a qualified assessment.

Learning Objectives

- Identify how sharing information across documents, spreadsheets, and presentations contributes to a successful SEC filing.
- Locate the Style Guide feature, how to use it in a document, and what user permission is allowed access to it.
- Recognize Filing Manager permissions in the Workiva Platform.
- Recall document formatting in the Workiva Platform and name several ways to format tables.
- Define the best practice for creating sections in a document.

Program Details

Instructional delivery methods

QAS Self Study

Recommend CPE credit and recommended field of study

Earn 3.4 CPE credits in Accounting

Prerequisites

No prerequisite knowledge is required for this course.

Program level

Basic

Advance Preparation

No advance preparation is required.

Course registration and attendance requirements

www.training.workiva.com

Refund policy and cancellation policy

This course is free of charge to all learners.

Complaint resolution

Please contact us at training@workiva.com

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