

Background could be your company color(s) or an image you use often for presentations

# The Workiva Platform - Part II

Instructor: YOUR NAME HERE  
TITLE

# Agenda

## Part II

- Create a Presentation
  - Create & Format a Chart
- Create a Spreadsheet
- Learn How to Create All Types of Links
  - 1:1, 1:many
  - Subcell linking
- Publishing & Partial Publishing
- Navigating Link Properties
- Purple Question Mark

# From Classic to Next Gen



Classic Documents



Adobe Flash Player

Disabled on 12/31/2020



Documents

**NEXT GEN**

HTML5

 Classic Document

 Document

YOUR LOGO HERE

# NextGen Documents

## Key Features and Functionality:

- HTML5
- Can utilize split-screen view with a Spreadsheet
- Multiple monitors view
- Continuous scrolling
- Many right click options have moved to the right hand panel now
- Document Health Check, rather than Validation / Pagination
- Separate Filing experience in Next Gen
- Publish Links
- Real-time Collaboration

# Presentations

Example Use Cases:

- Process Dashboards
- Flowcharts
- Internal Management Decks
- External Reporting

# Presentations - Right Hand Panel - Slide Properties

The screenshot displays a presentation software interface. At the top, the title bar reads "Quarterly Close Deck (Q2 2019)". Below it is a menu bar with "File", "Edit", and "View". A comprehensive toolbar follows, containing icons for undo, redo, font selection (Helvetica, size 16), bold, italic, underline, link, unlink, text box, table, image, chart, shape, and other editing tools. The main workspace shows a slide with a dark blue background and white topographic-style contour lines. The slide content includes the text "Monthly Close Deck Global View Update" in a large, bold, yellow font, "Q1 2020" in a smaller white font, and the "Avikro" logo at the bottom center. On the left, a navigation pane lists slide titles, with "Overview, Slide - 1" selected. On the right, a "Slide Properties" panel is open, outlined in red. This panel has sections for "Layout" (with a "New Layout" dropdown), "Background" (with a "Color" selector and an "Image" upload button), and "Numbering" (with an "Insert Slide Number" button, radio buttons for "Continue number from previous slide" (selected) and "Restart slide numbering", a "Starts at" input field set to "1", and a "Style" dropdown set to "1, 2, 3"). At the bottom right of the interface, there are search, zoom (58%), and user profile icons.

YOUR LOGO HERE

# Presentations - Layouts

The screenshot displays a presentation software interface for a deck titled "Quarterly Close Deck (Q2 2019)". The interface includes a menu bar with "File", "Edit", "Data", "View", and "Review". Below the menu is a toolbar with icons for "Exit Layouts", "Present", "Show/Hide", "Find", and "Ruler".

On the left side, a "Slide Layouts" panel is open, showing a list of layout options: "Cover", "New Layout", "Default Layout", "null", "null", "null", "portrait", and "Transition Slide".

The main slide area shows a slide with a blue background and white topographic contour lines. The "Avikro" logo is visible in the bottom right corner of the slide. A ruler at the top of the slide area indicates slide numbers from 1 to 15.

On the right side, a "Layout Properties" panel is open, showing settings for the selected layout:

- Layout**: Slide Size is set to "Custom...".
- Width**: 16 in.
- Height**: 9 in.
- Orientation**: Portrait (indicated by a vertical rectangle icon).
- Background**: Includes a "Color" selector and an "Image" section with an "Upload Image" button and a "Clear" link.
- Numbering**: Includes an "Insert Slide Number" button.

At the bottom of the interface, there is a status bar with navigation icons, a search icon, a zoom level of "55%", and a user profile icon.

YOUR LOGO HERE

# Presentations - RHand Panel - Shape Properties

Quarterly Close Deck (Q2 2019)

File Edit View

Normal Helvetica 12

Styles B I U K A' A, [ ] + [ Insert

Quarterly Close Deck (...)

Overview, Slide - 1

Overview of Results

Overview, Slide - 3

Overview, Slide - 4

Overview, Slide - 5

Overview, Slide - 6

Overview, Slide - 7

Overview, Slide - 8

Overview, Slide - 9

Overview, Slide - 10

Overview, Slide - 11

Overview, Slide - 12

North America, Slide - 1

North America, Slide - 2

Latin America, Slide - 1

Latin America, Slide - 2

## Overview of Results - Q1 2020

(in Thousands)

### Total Company Net Sales vs Budget

Year	Net Sales
2017	\$1,887,987
2018	\$1,491,063
2019	\$2,071,170
2020	\$2,285,170
2021	\$2,590,670
2022	\$2,805,370
2023	\$3,229,470
2024	\$3,663,370

### Commentary on Results as of March 31, 2020

- For the three months ended March 31, 2020 our Net Sales are \$0.0 billion, a decrease over the prior year period by \$1,491.1 million or 100.0%.
- We also saw a decrease over plan of \$2,071.2 million or 100.0% for the three months ended March 31, 2020.
- As of March 31, 2020, total Cash and Cash Equivalents on hand was \$0.0 billion. This represents a decrease of \$0.0 million or #DIV/0! as compared to December 31, 2019.
- The primary driver for the change in Cash during the three months ended March 31, 2020 was a decrease of \$605.3 million in Net cash provided by operating activities to \$0.0 million.

### Selected Financial Highlights

	Three months ended		% Increase (Decrease)
	March 31, 2020	March 31, 2019	
Net Sales	\$ —	\$ 1,491,063	(100.0)%
Gross margin	—	1,341,702	(100.0)%
Total operating expenses	—	972,433	(100.0)%
Operating income	—	369,269	(100.0)%
Net income	\$ —	\$ 282,503	(100.0)%
Basic earnings per common share	\$ —	\$ 0.52	(100.0)%
Diluted earnings per common share	\$ —	\$ 0.51	(100.0)%

Avikro

(\*) - N/A = North America

### Shape Properties

Size

Width: 6.94 in.

Height: 3.63 in.

Preserve aspect ratio

Rotation: 0.00 °

### Position

Position From: [Grid icons]

X Position: 8.93 in.

Y Position: 1.18 in.

Change Shape: Select

58%

# Presentations - RHand Panel - Chart Properties

Quarterly Close Deck (Q2 2019)

File Edit View

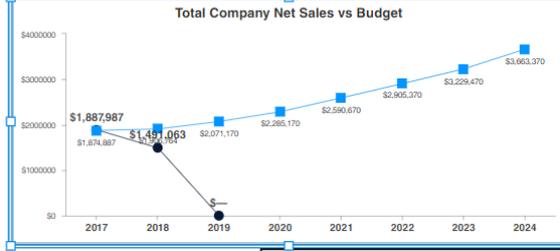


Quarterly Close Deck (...)

- Overview, Slide - 1
  - Overview of Results**
  - Overview, Slide - 3
  - Overview, Slide - 4
  - Overview, Slide - 5
  - Overview, Slide - 6
  - Overview, Slide - 7
  - Overview, Slide - 8
  - Overview, Slide - 9
  - Overview, Slide - 10
  - Overview, Slide - 11
  - Overview, Slide - 12
- North America, Slide - 1
  - North America, Slide - 2
- Latin America, Slide - 1
  - Latin America, Slide - 2

## Overview of Results - Q1 2020

(in Thousands)



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## Chart Properties

General

Title: Total Company Net Sales vs Budget

Stack Bars:

Orientation:  Column  Row

Width: 789 px

Height: 351 px

Spacing: Set Spacing Options

Plot Area Fill: Solid

Fill:

Series

All Series

Type: Line

Show Labels:

# Presentations - Chart Data

Quarterly Close Deck (Q2 2019)

Edit

Publish Undo Redo Styles

Calibri 12

Normal

Automatic

Clear Painter Conditions

A1 X ✓ f<sub>x</sub>

	A	B	C	D	E	F	G	H	I
1		2017	2018	2019	2020	2021	2022	2023	2024
2	Net Sales Actual	\$1,887,987	\$ —	\$ —	\$ —				
3	Plan	\$ 1,874,887	\$ 1,906,764	\$ 2,071,170	\$ 2,285,170	\$ 2,590,670	\$ 2,905,370	\$ 3,229,470	\$ 3,663,370
4									

# Presentations - Slide Outline

Quarterly Close Deck (Q2 2019)

File Edit View



Quarterly Close Deck (...)

- Overview, Slide - 1
- Overview of Results
- Overview, Slide - 3
- Overview, Slide - 4
- Overview, Slide - 5
- Overview, Slide - 6
- Overview, Slide - 7
- Overview, Slide - 8
- Overview, Slide - 9
- Overview, Slide - 10
- Overview, Slide - 11
- Overview, Slide - 12
- North America, Slide - 1
- North America, Slide - 2
- Latin America, Slide - 1
- Latin America, Slide - 2



Slide Properties

Layout

Slide Master: New Layout

Background

Color: [Color Picker]

Image: Upload Image

Reset to layout

Numbering

Insert Slide Number

Continue number from previous slide

Restart slide numbering

Starts at: 1

Style: 1, 2, 3

YOUR LOGO HERE

Demo

## **Presentations**

- Slide Layouts
- Slides
- Charts & Editing
- Flowcharts
- Publish

# Create a Presentations

Your Turn!

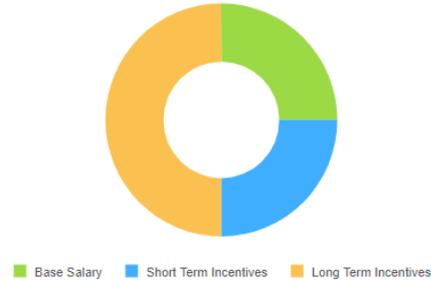
1. From Wdesk Home
  - a. Click Create > Presentation > Presentation from Template
  - b. Choose the "Workiva Platform Training - Presentations Template"
2. Go to File in Presentation > Rename and change name to "YourName Pres - MM.DD.YY"
3. Move your presentation to today's Participants Files folder in Home

# Chart Basics

## Charts

- A wide variety of charts are available
- Easily update charts from the chart data tab
- Data can be linked for chart automation

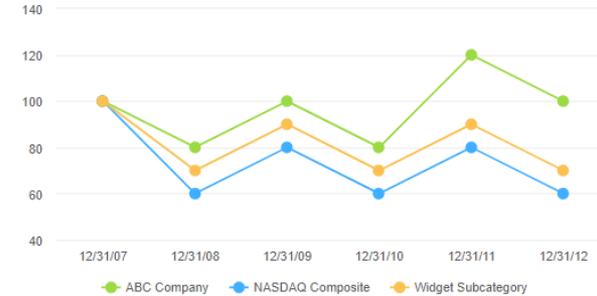
Example Total Return Performance



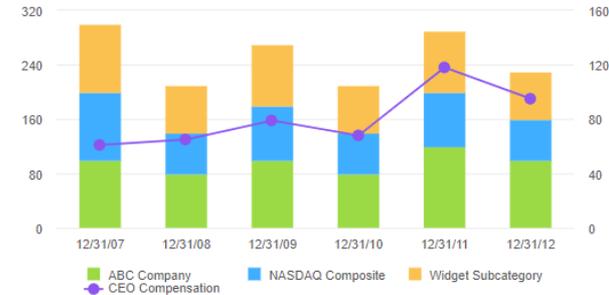
Example Annual Net Income



Example Total Return Performance



Example Total Return Performance



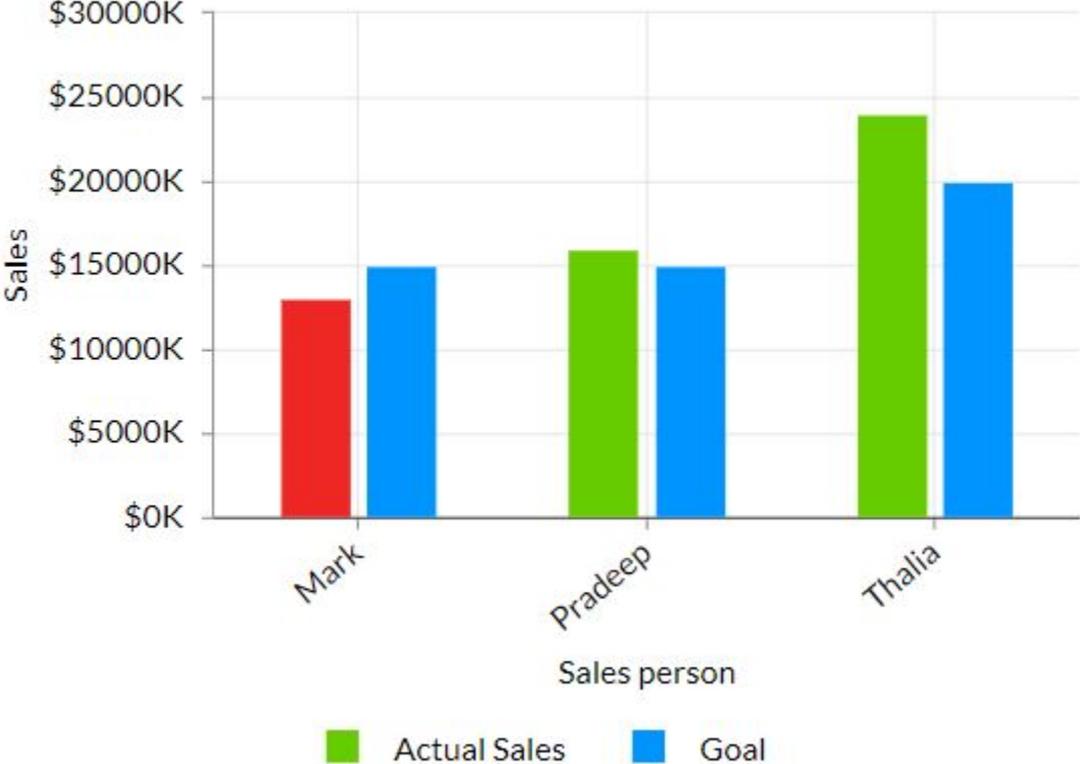
# Charts - Activity

Your Turn!

1. Add a new slide called "Sales in Q1"
2. Insert a Column Chart
3. Open Chart Data
4. Go to "Source Information - Copy/Paste" and copy chart data
5. Go back to your new chart's data tab
  - a. Paste (you may need to select Apply Formatting option from clipboard)
6. Delete unwanted columns (D,F,G)
7. Make it match the chart you see in the "Source Information - Copy/Paste" document (see also example chart on the next slide)
  - a. Update chart title, labels, and formats for both axes
  - b. Add label angles to bottom axis
  - c. Try to change the color of a column

Note: Click each item (column, title, etc.) to edit in a chart, Prefix and Suffix edits are under Chart Data

# Sales in Q1



?s

# Presentations & Charts