



workiva

Workiva Platform 200: Data Automation Demonstration

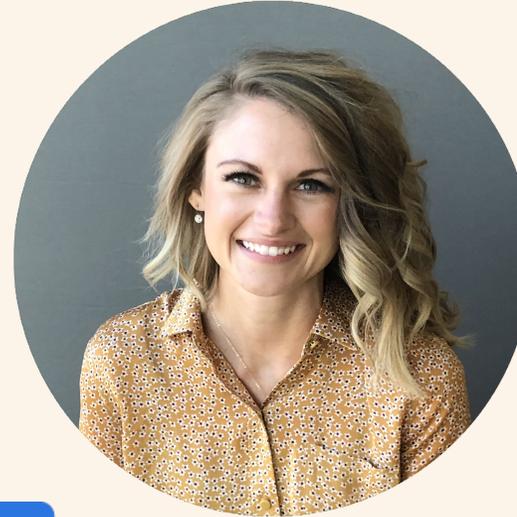
workiva



Introductions



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Partner Certification Learning Path Catalog



Earning a Workiva badge or certification will help your organization and individuals in your organization:

- Be seen as an **expert** in Workiva
- Gain a **competitive advantage**
- Increase **product efficiency**

Some courses cater to different types of partners. Each badge and certification lists a [target audience](#) to help you get an idea if the learning path is right for you.

Badges

Badges are awarded for successfully completing each course outlined in a learning path. This signifies that an individual has put in time and effort to increase their Workiva acumen.



Introduction to Workiva, Strategy & Platform.
Includes Platform and Solution Demos.



Docs, SS, Pres
Linking Revisions
Workspaces
Blacklines
Permissioning
Comments
Tasks
Import/Export



Data Prep
Connectors/APIs
Wdesk Sync/CSV
Upload
Calculation/
Translation
Aggregation
Business Data
Validation



Demonstrates general understanding of the Workiva platform



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Certifications

Certifications are awarded for successfully passing a certification exam after a learning path is completed. This signifies that an individual has demonstrated their application of skills/competencies.



Agenda

-  **1** Brief review of the Workiva platform architecture
-  **2** Platform focus: Wdata and chains
-  **3** Automation Demo: Full platform record to report process

Workiva Platform

Connected Reporting & Compliance

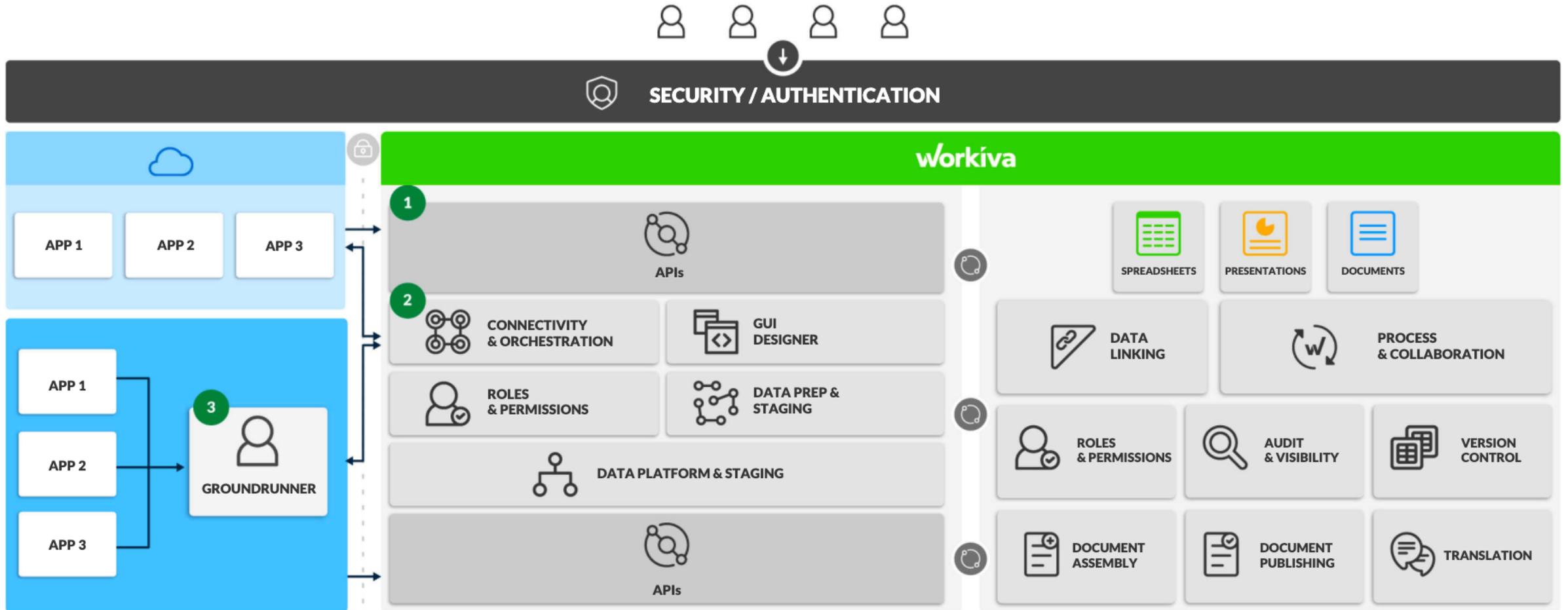
Wdesk comes with every solution. Its core elements include, Documents, Presentations, Spreadsheets, Linking, Permissioning, Unlimited Revision History, Workspaces, Projects, Blackline, Comments, Tasks, Import, Export...and more.

Connected Data

Wdata is the core location for all large scale data sets—consolidated trial balance, unconsolidated GL, etc. It is the starting point of most core reporting cycles. Wdata is also the home of our core integrations with systems of record like SAP, Oracle, and many others.



Workiva: Reference Architecture



1 APIs - Secure interfaces for sharing and managing data, processes and structures in Wdata.

2 Connectivity - Bi-directional orchestration and connectivity to systems/technologies with prebuilt connectors.

3 On-Premise Connectivity - Proxy command executor for on-premise connectivity; leveraging pre-build connectors and orchestration in a secure manner.

Why Wdata



Centralized

Your most precious information all in one place—easily search, connect, and add context with Wdata.



Trusted

Connected data is fully traceable and auditable, from source system to final report.



Accessible

Provide access to those who need it, without losing control or transparency along the way.



So what is Wdata?



It is an application that can consume and store large datasets, query those datasets, and then use the output in down-line, auditable reports required by the business.



So what is Chains?



(1) "Chains" is the environment within Wdata that allows for data connectivity and automation.

(2) A chain is a sequence of commands and events used to define workflows and automate processes.

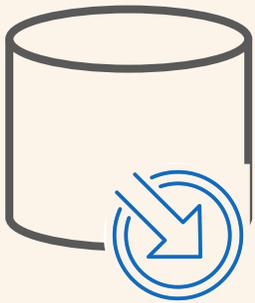
Data Flow in the Workiva Platform

Chains

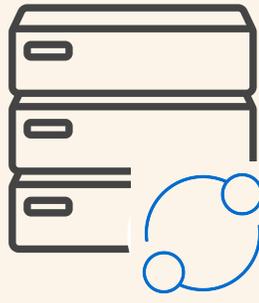
Wdata

Wdesk

Connection to source data/ERP



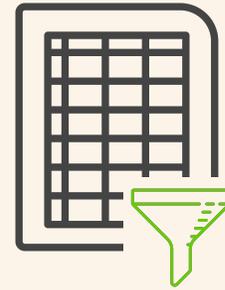
Chain automatically loads data into Wdata tables



Queries within Wdata



Sheets connected to Wdata queries



Sheets with formulas linked to reporting package



Linked data in presentations



Financial reporting package



Pivoted views in Wdata