



Demo Project Management Reporting Setup Instructions

Create a new workspace for this demo for the following reasons:

- Wdata content is updated, so old Wdata content will need to be wiped in an existing workspace
- You'll get a lot of "(1)"s after file names after you import since there are duplicate file names
- It keeps your old demo account cleaner making it easier to find old custom demos

Configure your workspace:

- Create a new Workspace from home (see help article); you do not need to be a super admin for this
- Give your workspace a name
- Select a solution; recommend: "connected annual and quarterly reporting"
- Create your workspace

Contact a demo super admin if:

- Financial Reporting (with XBRL) or your desired solution type is not listed in your solution dropdown
- Wdata and/or Chains are not enabled in your new workspace