Steps for a Data Provider

Step 1: Data collection process kicked off

- The process will be kicked off by the report owner
- Each data provider will receive an email for each task they're assigned
  - Sent from *Workiva Notifications [notifications@app.wdesk.com]*
  - Note: if you did not receive an email notification, please check spam, and add *notifications@app.wdesk.com* to your contacts

Step 2: Open task

- Email notification will contain details around the topics you've been assigned to provide data to, as well as a link directly to the assigned task
- Select the green **Go to Task** button at the bottom of the email
  - This will navigate you directly to the task, opening the file and associated section
  - Note: You may be asked to sign into Workiva prior to navigating to the task

Step 3: Input data

- Input data into blue highlighted cells
  - Data can be added via
    - Manual hand-key
    - Copy/paste from word or excel

Step 4: Add supporting documentation

- When indicated, attach supporting documentation to the cell it corresponds to
- For information on attaching supporting documentation, see the Help article: Attachments in spreadsheets

Step 5: Complete task

- Once data entry is complete, select **Complete** at the bottom of the Tasks panel (right hand side)
- For additional guidance on viewing and complete tasks, see the Help article: View and complete tasks

Step 6: Approver will return or approve task

- The approver will receive an email notifying them the task has been complete. They can either Return or Approve the task
- If returned
  - Data provider will receive email notification with link
  - Review comments left by approver (see Comments in spreadsheets for more information)
  - Make adjustments as needed
  - Select **Complete** at the bottom of the Tasks panel (right hand side)
- If approved
  - Data provider will receive email notification stating approval
  - No further action is needed.