Processes

Processes is the Workiva product used to help automate collecting ESG Data by reducing oversight in typically long-running process that involve people and systems.
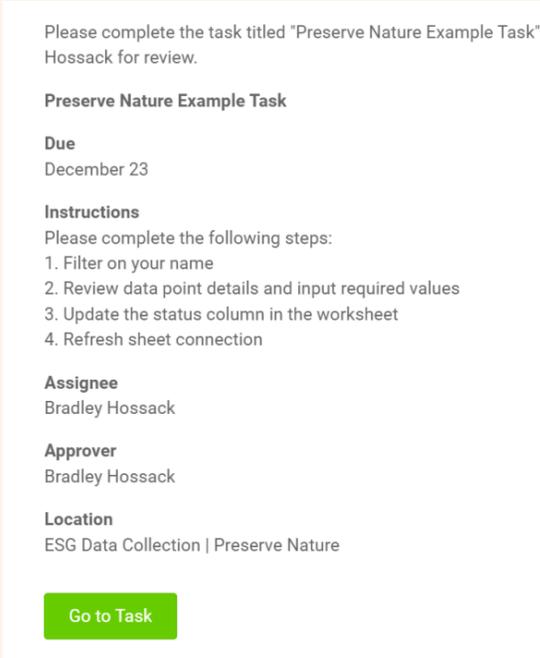
A single Process can involve multiple Tasks, where each Task can be assigned to a Data Provider and Approver. Each Task is also connected to a specific Data Collection spreadsheet with assigned Data Points.

Tasks have email notifications that are sent when the Processes starts, Actions are made and reminders based on the Due Dates set.

Key Steps

1 Email Notification

Please complete the task titled "Preserve Nature Example Task". Hossack for review.

Preserve Nature Example Task

Due
December 23

Instructions
Please complete the following steps:
1. Filter on your name
2. Review data point details and input required values
3. Update the status column in the worksheet
4. Refresh sheet connection

Assignee
Bradley Hossack

Approver
Bradley Hossack

Location
ESG Data Collection | Preserve Nature

[Go to Task]

Once the Processes kicks-off, email notifications (example here) will be sent to the assigned Data Providers.

You may need to check your SPAM for emails from notifications@wdesk.com & notifications@eu.wdesk.com

Upon opening the email, see the details of the task including:
- Due Date
- Instructions
- Assignee and Approver
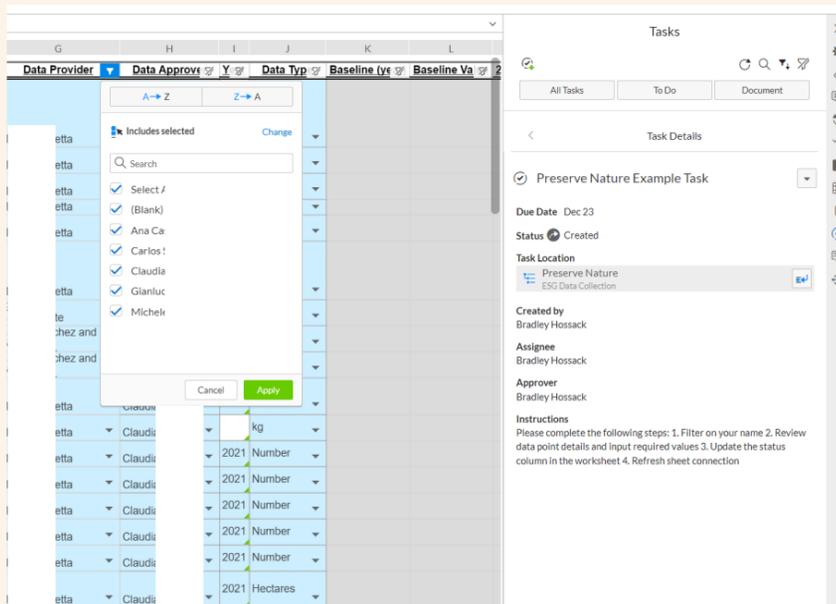- Spreadsheet location

When you are ready to start working on the task, click on the **"Go to Task"** button at the bottom. This will redirect you to the specific spreadsheet in the Workiva platform.
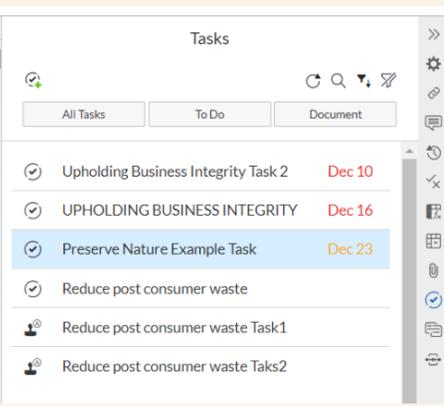
2 Data Collection Sheet

Once you reach the Workiva Platform, you will see the Spreadsheet associated with the Task open, with the Task details shown in the right sidebar.

Use the filter option on the Data Provider or Data Approver column to show the specific data points assigned to you.

Upon completing your assigned data points for the specific sheet, update the Status Provider or Status Approver column and click the green **'Complete'** button at the bottom of the Task Details.

If the Task right sidebar was closed at some point during your process to provide/approve the assigned data points, click on the circled check-mark Task icon on the right sidebar.

This will show an overview of all the Tasks available. You can use the filter option to refine the list of Tasks further.

Once you find desired task for the Spreadsheet you were working on, click the Task to open the details again.

With the Task open again, you can click the green **"Complete"** button at the bottom.

As a Data Provider, this will send a notification to the assigned Approver.

Similar to the Data Provider, the assigned Approver will need to review the data points assigned to them, update the Approver status column in the spreadsheet and click the green **"Approve"** button at the bottom of the Task details.

The Approver also has the option to click the **"Return"** button which will send the Task back to the Data Provider with an email notification.

Data Provider Task Details
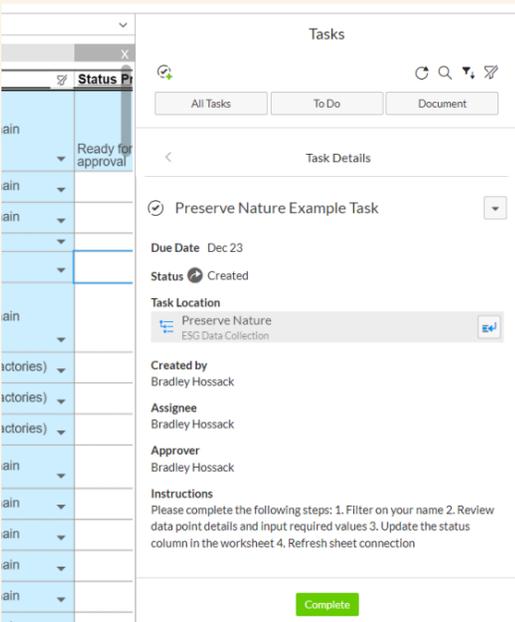
Approver Task Details
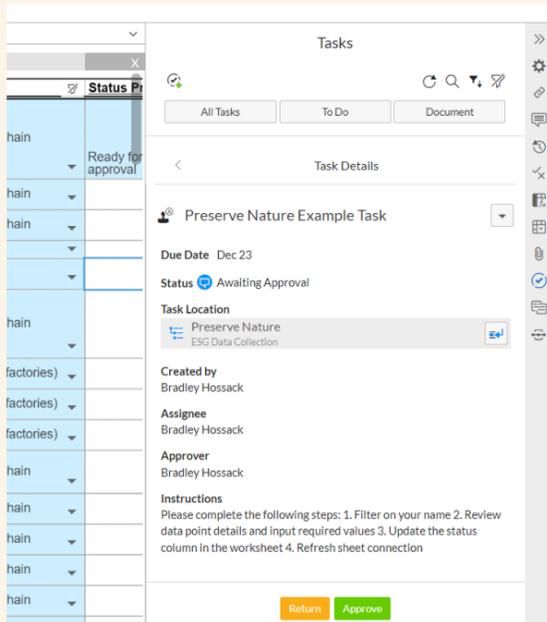
Navigating Processes in Workiva Platform

The following will give an overview of how to navigate through Processes in the Workiva platform

1 **Home** 🏠

The Home site will be the default landing page when you login to the Workiva platform directly (not clicking the link in the task notification email). To get a quick overview of the tasks assigned to you, click on the "Tasks" option in the main screen.
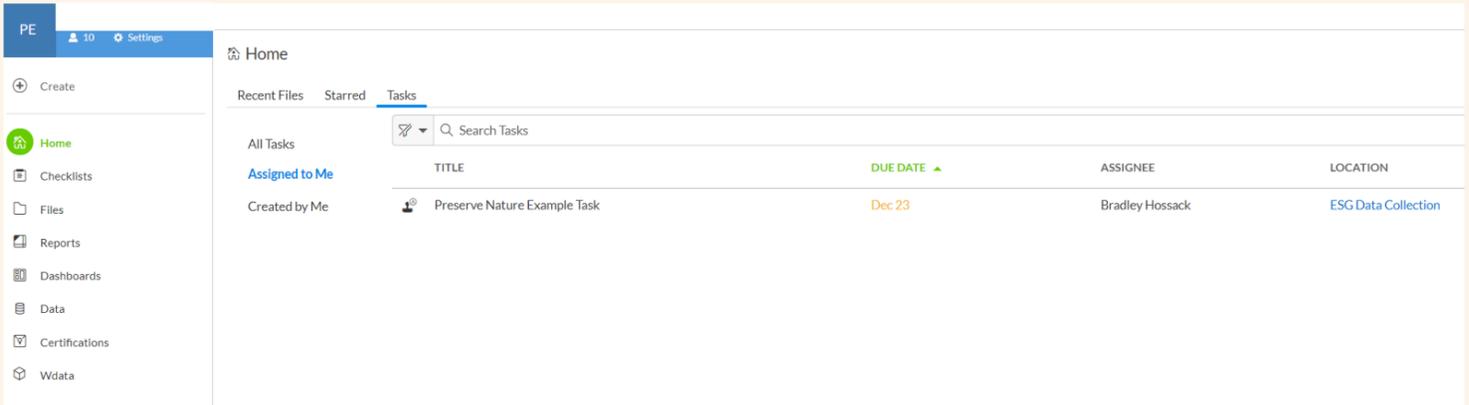
Once you have found the desired Task, click on it to view the Task details in the right sidebar.

If you want to navigate to the specific Data Collection sheet, click the blue arrow icon under the "Task Location" section. As mentioned in the Key Steps, this is where you can filter the spreadsheet on your name to provide/review any data points assigned to you.

In the case where you have completed your required actions for the Task, click the green button at the bottom of the Task details in the right sidebar. If you are a Data Provider, this would be the **"Complete"** button. If you are an Approver, this would be a **"Return"** or **"Approve"** button.
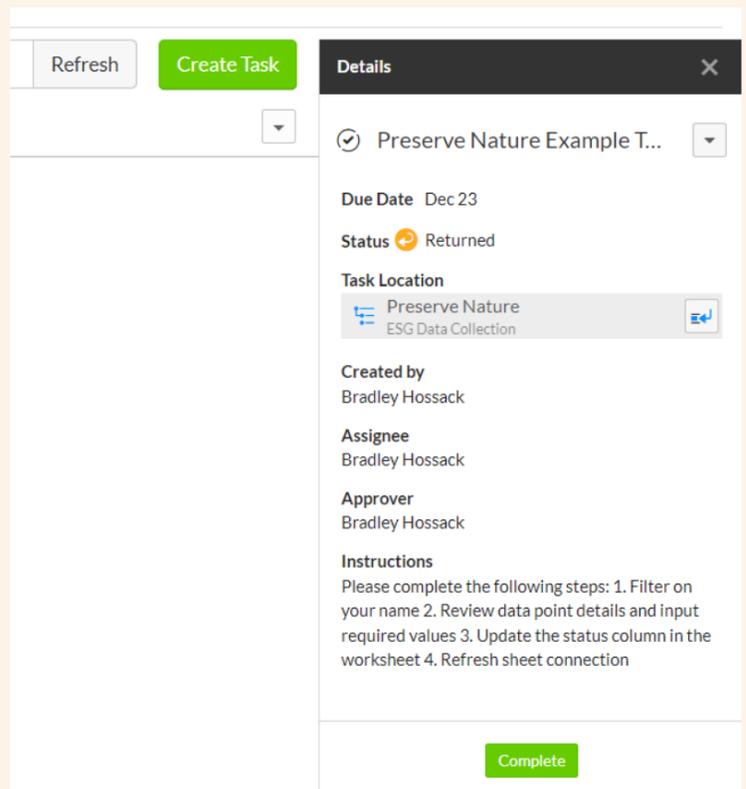
2 **Processes File** ⚙️

If you need to see more detail on how a certain Task fits within the overall Processes, you can navigate to the "Files" experience on the left sidebar and search for a file with the Processes icon. ⚙️
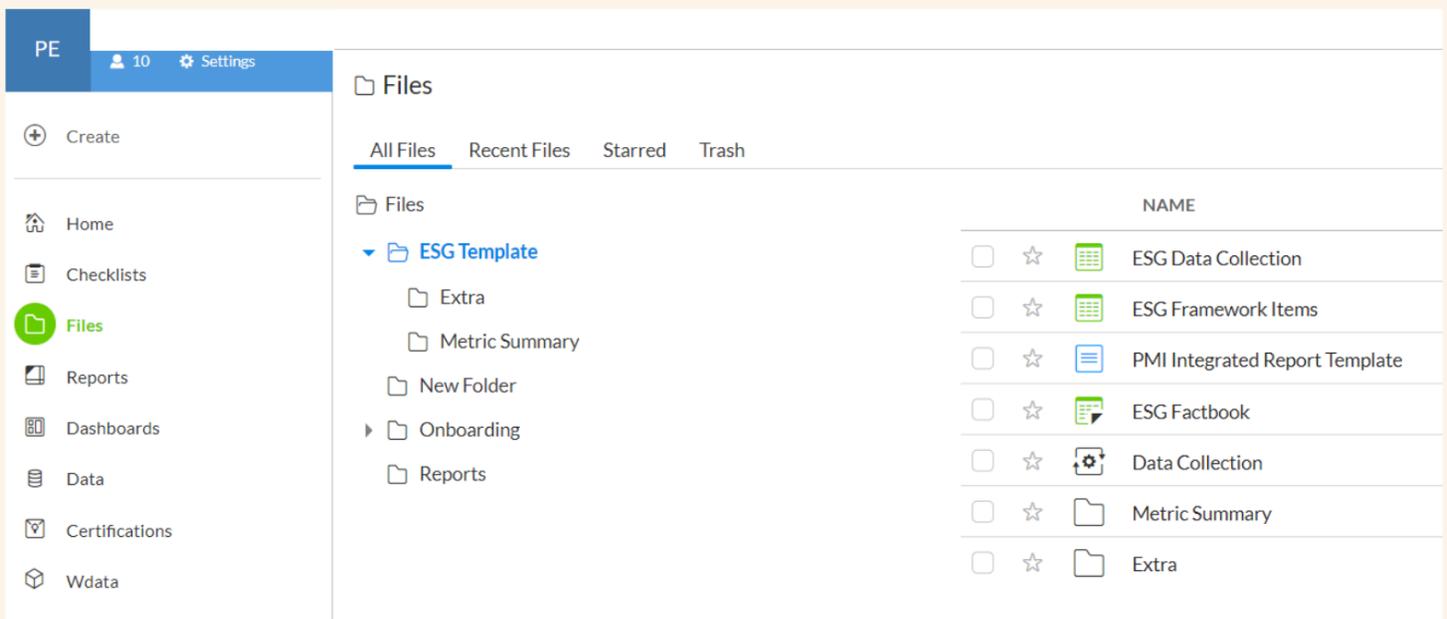
When you open the Processes file, you will be able to see a list of the Tasks setup with a status overview chart in the right sidebar. Click on any Task to view the details similar to the steps above.