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

# The Workiva Platform - Part I

**Instructor: YOUR NAME HERE** 

TITLE

# Learning Objectives

#### By the end of this course, you will be able to:

- Access the Workiva Platform
- Navigate and Organize Home
- Create/Edit Documents, Spreadsheets, and Presentations
- Make Documentation Interactive via Linking
- Utilize Digital Review features
- Access Additional Resources, ?

## Agenda

#### Part I

- Organizations/Workspaces
- Navigate Home
  - Organize Folders
- Create a Document
- Format Documents
  - Properties & Permissions
  - Populate and Format Text & Tables
  - Insert Hyperlinks & Auto-text
- Review Features
  - Track Changes, Blacklines, Comments, Tasking

## 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

# Organizations & Workspaces

# Purpose of Workspaces

- A place for an individual team to collaborate
- Customize your space
- Ability to easily find and organize your files
- Secure
- Move files across teams safely

# **Using Workspaces**

#### Belonging to a Workspace

- You may belong to one or more than one workspace
- Easily switch between workspaces

#### Creating a New Workspace

- You can create new workspaces if allowed by your organization admins
- You will be the Admin (can manage members and groups)
- Type of workspace dictates what features you have access to
- Select workspace type with care



Demo

### Workspaces & Home

- Navigate
- Create
- Admin
- Folder Organization
- Folder Copy

# Workspaces

### Workiva Home

#### What can I do there?

- Search, Access, and open your files
- Organize your content
- Create documents, spreadsheets, presentations, and folders
- Access User specific items
  - Recent Files
  - Starred
  - Tasking
- Copy a folder = rollforward
- Other
  - Certifications all
  - Filing/Section 16
  - Database/Audit



# **Open a Document - Activity**

**Your Turn!** 

- 1. Search for the "Class Discussion/Polling" Document from home
- 2. Open it
- 3. Find the section with your name on it
- 4. Type a response to the question in the gray box

Now check out the "Class Discussion Results" section to see what everyone else's answers were.

## Back to Workiva Home

How do I get home?



## Back to Workiva Home

How do I get home?

 The Workiva Home browser tab is collapsed on the left side and is always accessible

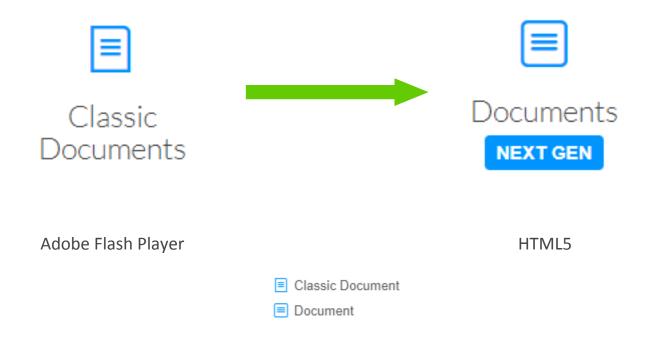


# **Create and Organize a Document - Activity**

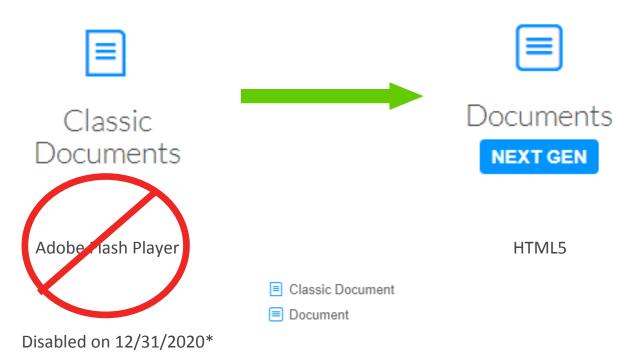
**Your Turn!** 

- 1. Create a Document:
  - a. From Home>Create>Document
  - b. Under File>Rename it "YourName Doc MM.DD.YY"
- 2. Organize your Document:
  - a. Go back to Home
  - b. Locate your newly created document (may need to refresh)
  - c. Move it to the "TODAY'S DATE Participant Files" folder

## From Classic to Next Gen



## From Classic to Next Gen



<sup>\*</sup>could be earlier due to changes being rolled out by browser and Adobe

# Home & NextGen