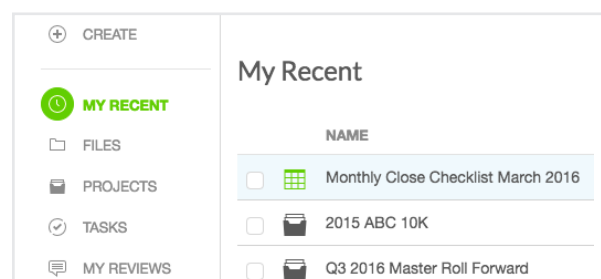


# Wdesk Quick Guide

## 1. Opening Content in Wdesk Home

Open a file in Wdesk Home by selecting the file name and double-clicking it. To the left of the recent file list are various filters:

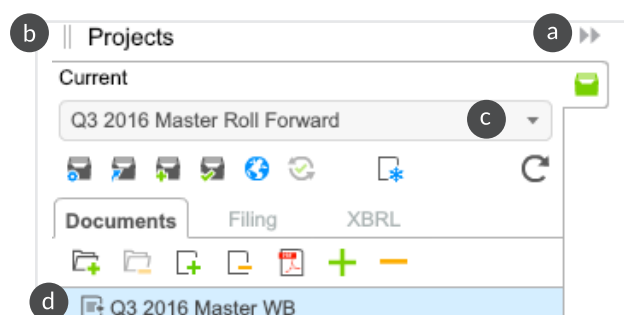
- My Recent
- Files
- Projects
- Tasks
- My Reviews



## 2. Project Panel

Your projects and project components are displayed in the right-hand panel.

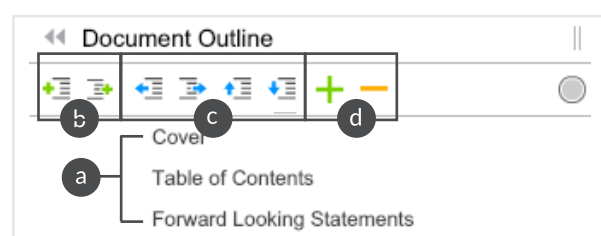
- Click the double arrows to collapse or expand the panel.
- Drag the double vertical lines to resize the panel.
- Use the drop-down list to open recent projects or see a list of all projects.
- To open a document that lives within a project, double-click the document name.



## 3. Document Outline

Located in the left-hand panel, the document outline displays all the sections of the document and contains features that allow for reorganization and management of the sections.

- Navigate within your document by clicking on section names.
- Create new sections before or after the highlighted section.
- Move a section up/down or promote/demote the selected section.
- Expand or collapse all sections.



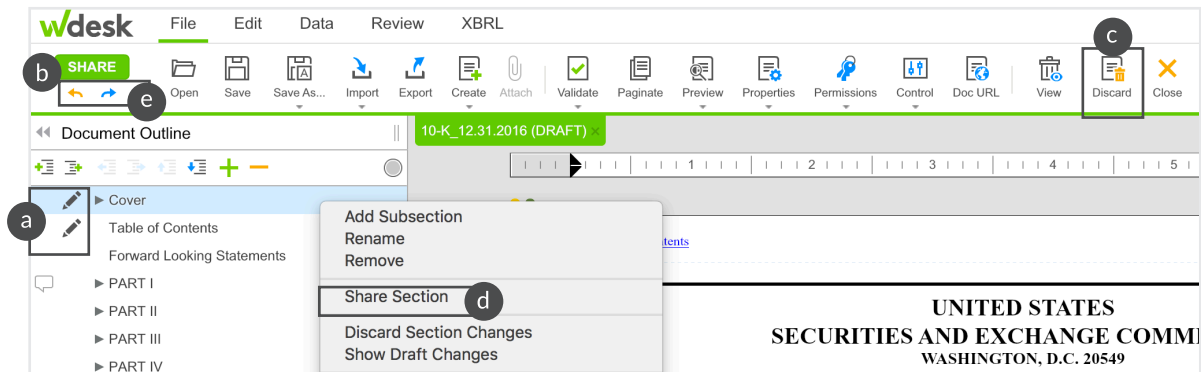
## 4. Section Properties

Set parameters for the specific section under the **Section Properties** heading. Customize parameters, including permissions, page layout, headers and footers, and formatting. Adjust settings by selecting the section in the **Document Outline**, right-click, and select **Section Properties**. You can also access **Section Properties** from the **File** tab and **Properties** drop-down menu.

## 5. Share, Discard, Undo, and Redo

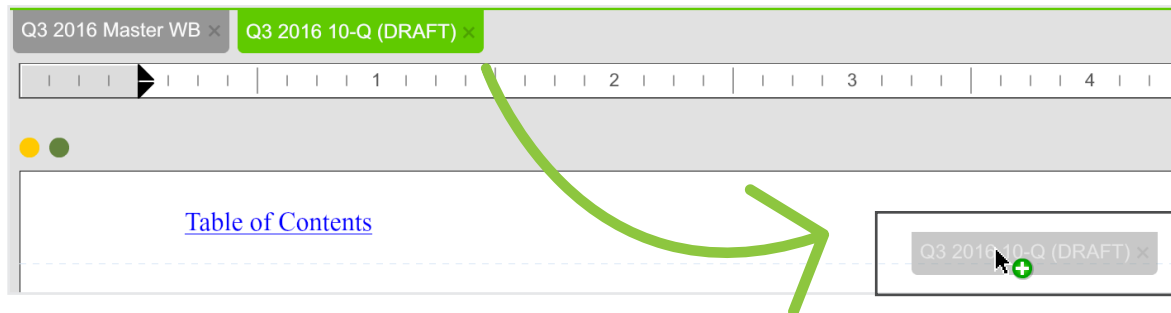
Share and discard changes to a single section or an entire document. Initiating a share allows your changes to become visible to others. Once a share is complete, the changes made can no longer be reverted using the undo or the discard function.

- The pencil icon indicates you are editing a section. All other users will see a padlock icon.
- Share** will apply changes for the entire document.
- Discard** will remove previously unshared changes for the entire document.
- Access the **Share Section** or **Discard Section Changes** option by right-clicking on a section name that you are currently editing.
- Undo** or **Redo** will reverse unshared changes made to the document.



## 6. View Documents Side by Side

This feature allows you to have two Wdesk files open on your screen at the same time to edit, compare, or link information. To view files side by side, select the file name tab, and drag it to the right until a green circle with a plus sign appears.



To undo, select one of the file name tabs, and drag it left until a green circle with + appears.

## 7. Insert Document Elements

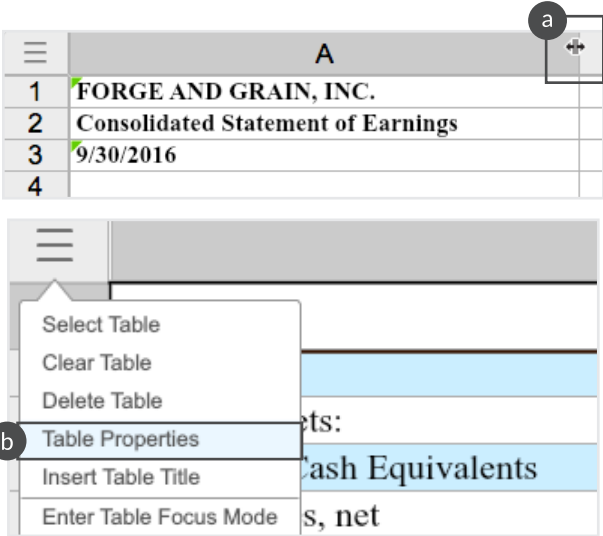
This drop-down allows you to insert a table, image, chart, page break, symbol, automatic text, hyperlink, or a horizontal rule line. From the **Edit** tab, select the Insert icon and choose the desired element from the drop-down list. The inserted element will appear where your cursor is positioned in the document.



8. Edit Table Properties

Within a document table, you can make adjustments to the size of rows, columns, or the entire table. Adjustments can be made in the following ways:

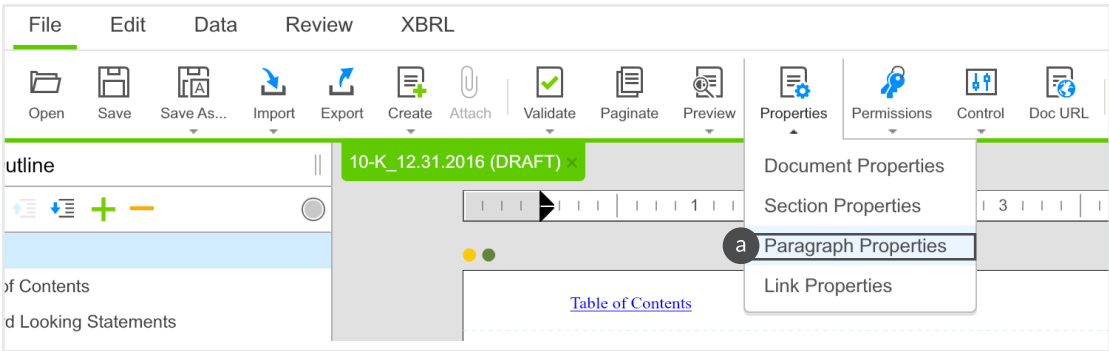
- a. To manually resize or auto-size a column or row to fit its content, hover your mouse over the row or column separator until you see a double-edged arrow. Then click and drag to resize, or double-click to auto-size.
- b. To access table, row, or column properties, click on the three horizontal lines in the upper left-hand corner of the table. In the menu that appears, select **Table Properties**. Next, select the desired properties tab in need of adjustment.



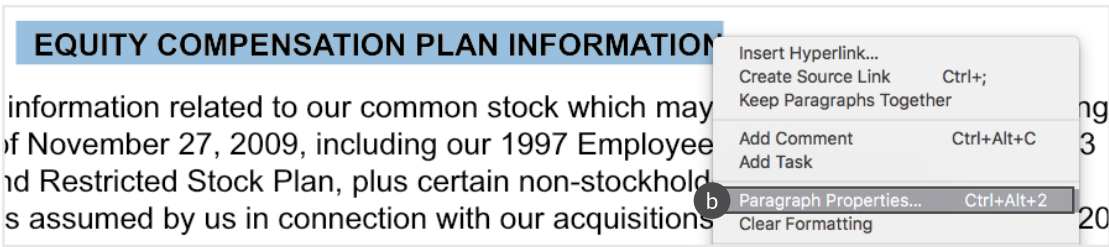
9. Paragraph Properties

This feature allows you to set alignment, indentation, spacing, and pagination parameters (e.g., keep with next, keep lines together, or widow/orphan control) for selected text. Access the paragraph properties in two ways:

- a. Click **Properties** in the **File** tab and select **Paragraph Properties**.



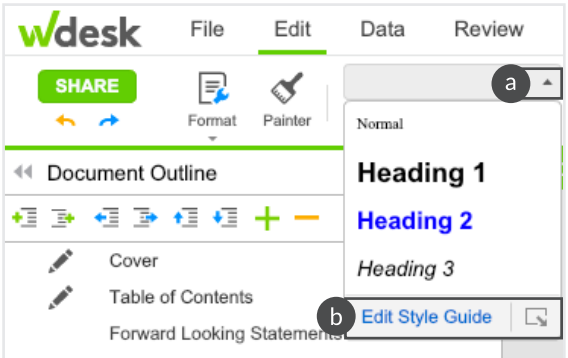
- b. Right-click on selected text, and then select **Paragraph Properties**.



10. Applying a Style

Styles allow you to set a formatting standard in document text, document tables, and presentations that can be reused throughout a document. The **Styles** menu is located in the **Edit** tab. The default style for text is **Normal**.

- a. To apply or change a style, select the text you wish to edit and choose the desired style from the Styles drop-down.
- b. To customize your style guide, choose **Edit Style Guide**. Note, only document owners can edit the style guide.



## 11. Linking Overview

Linking in Wdesk creates a connection between values—source and destination(s). The source is where the value originates, and the destination is the endpoint. Changes made to source links flow across documents to their destinations.

Any value types can be linked, including numbers, text, or dates, and can be linked into charts, tables, or the text of a document.

### Create a Link

Links are created by copying and pasting. Once the data is pasted, select the clipboard icon, choose the option **Create Links from...**, and then select what you would like linked.

- Links in tables will appear as a blue triangle at your source and a green triangle at your destination(s).
- Links in text will appear with gray outlines and blue or green triangles for source or destination(s) respectively. However, if the linked value is formatted as **Accounting** or **Date**, it will then show with either a blue underline for your source or green underline for your destination(s).

	A	B
1	Source	1,500
2	Destination	1,500

Link in text Link in text

\$1.5 million as of December 31, 2016

Any linked value that is in draft, i.e., it has not been shared, will have an orange tick mark indicator on the link. Sharing will remove this draft indicator.

### Format and Remove Links

To alter how a link is displayed in a table or document, right-click on a selected link and choose **Format Link**. Remove a link either from its source or a destination by right-clicking on it and choosing **Remove Links**. Note, removing a source link will remove all of its destinations from your document(s).

**Source links in text** are links found in text that are not sourced from another location but are still a linked value. To create a source link in text, highlight the value, right-click, and choose **Create Source Link**.

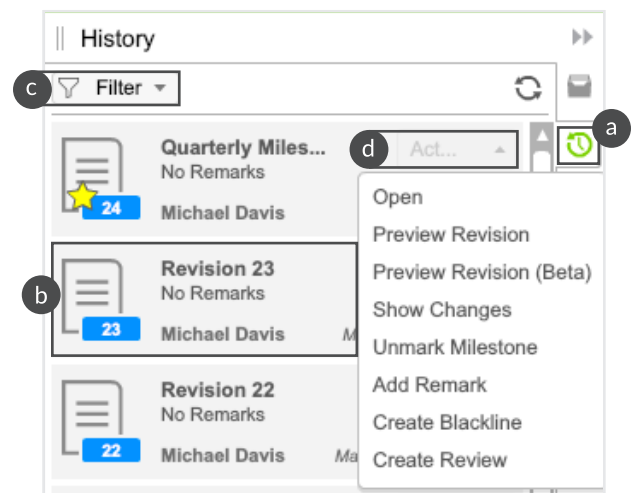
### Link properties

Link properties will show a link's history and identify the locations where it is used. Access a link's properties by right-clicking the linked value and selecting **Linked Properties**.

## 12. History Panel

The **History Panel** will appear in the right-hand panel when the History icon is selected. Here you can view revisions of the document that have been shared. A revision can be designated as a **Milestone**, which results in a yellow star being displayed.

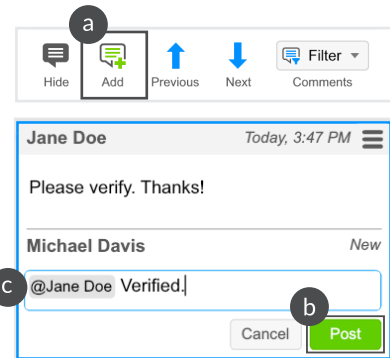
- Click the **History** icon to open the **History Panel**.
- The revision information shows the title of the revision, any remarks made on that revision, who shared the revision, and when it was shared.
- Filter the History Panel** by user, where changes were made, milestones, and when the revision occurred.
- From the **Actions** drop-down, open previous revisions, preview a revision, show changes between that revision and the prior revision, mark, or unmark a milestone, create a blackline to compare any two revisions, and create a review that can be shared.



## 13. Comments

Comments allow both document reviewers and editors the ability to leave remarks within a document without making changes to the document. Sections of the document that contain a comment will have a comment icon next to the section name in the document outline. To access the comments feature, click on the **Review** tab, and select the **Comments** icon.

- To add a new comment, select the text or table cell you wish to comment on, and select the **Add** icon to create a new comment box.
- Type your comment in the box, and choose **Post** to publish the comment.
- To make a directed comment, first type the @ symbol, and then the individual or group you wish to mention. Select the individual or group from the drop-down list, type your comment, and post. The recipient(s) will be notified of your comment.



### View and Manage Comments

From the **Review** tab, scroll through existing comments using the up and down blue arrows. **Filter** comments based on user, group, status, and/or timeframe. To manage a comment, click on the three horizontal lines in the upper right-hand corner of a comment box. From here, move, delete, or resolve the comment..

## 14. Additional Resources

The Success Center drop-down menu provides access to additional resources. Search for articles and videos in **Help**, and interact with Workiva experts and other users in our private online **Community**.

**Select the question mark icon** next to your name in the top right corner, and select the information you wish to view.

