Wdesk Guide for Higher Education Reporting

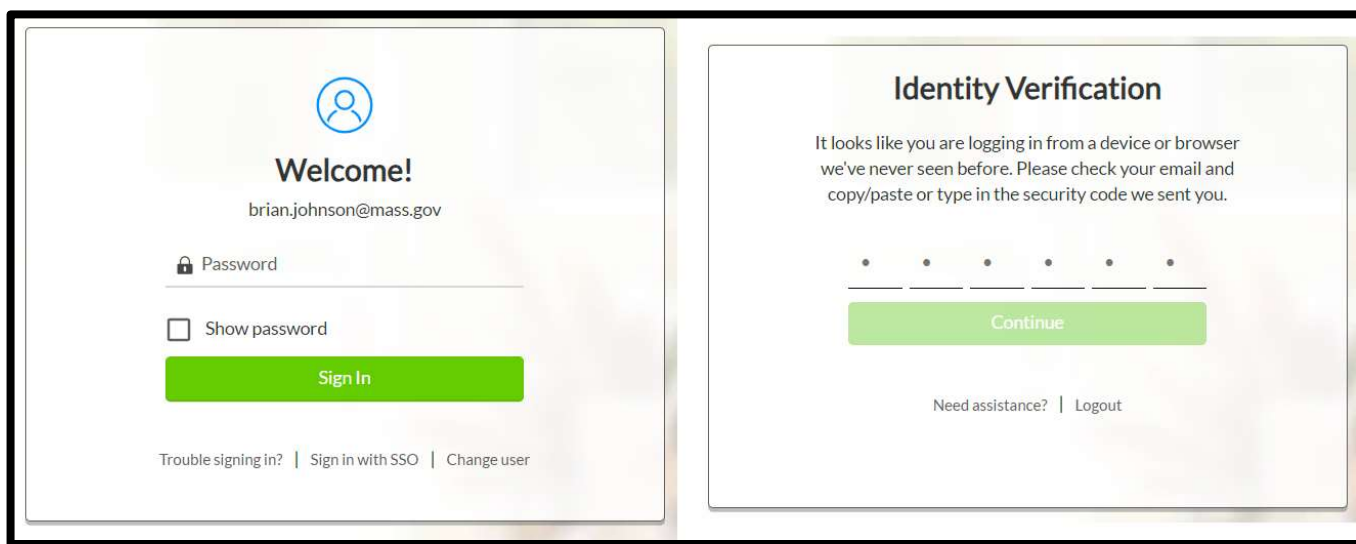## How to get to Higher Education Reporting in Wdesk

The preferred browser to use Wdesk is Chrome. Alternatively, the Edge browser is also compatible with Wdesk, but Chrome works best.

Website link and login

Link: https://app.wdesk.com/home/

This is the login screen for Wdesk, **please enter your email address and password***. You also might be prompted for an identity verification, which you will get an email with a 6-digit code to enter.

*If you have not created your Wdesk account yet, please email to hi-ed.fs.reporting@mass.gov to request an account and follow the steps once you receive the welcome and password reset emails from Workiva. Please note that the email you receive to set-up the account is only valid for 24 hours. If you were unable to set-up your account within the 24 hour limit, please contact the hi-ed inbox so the welcome email can be resent.

How to navigate to the HE-2 & 4 Worksheet

Once you have logged in, this is the main home page of Wdesk. On the left hand side is a toolbar for quick access to this home page and the Files page. **Click on the "Files" icon** to see the listing of folder available to access.
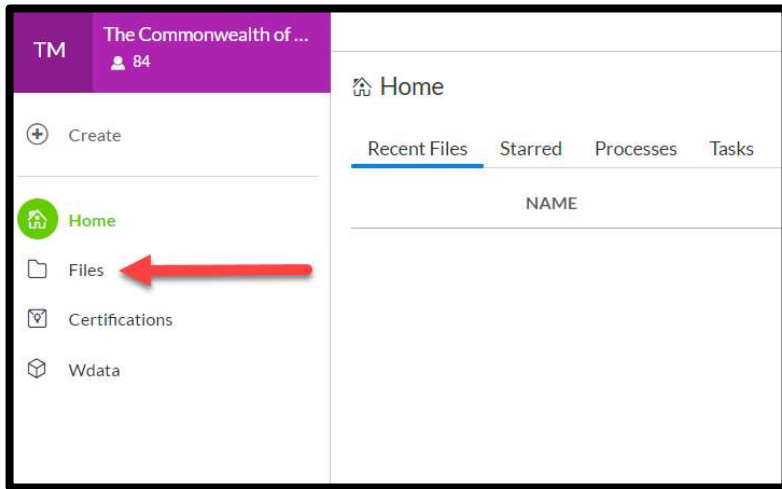

To get to the HE schedule: first **click on Files, then click on the folder called "FY2024 SBFR & ACFR > "2024 GAAP – Higher Education"** From here you can **star the file** (circled in red below) called **"FY2024 HE Schedules - Financial Statement, Footnote, Contact Survey"** so that you can easily get back to the file from the homepage using the starred tab at the top. See below screenshot for the starred page. **Clicking on the file name will open up the worksheet.**
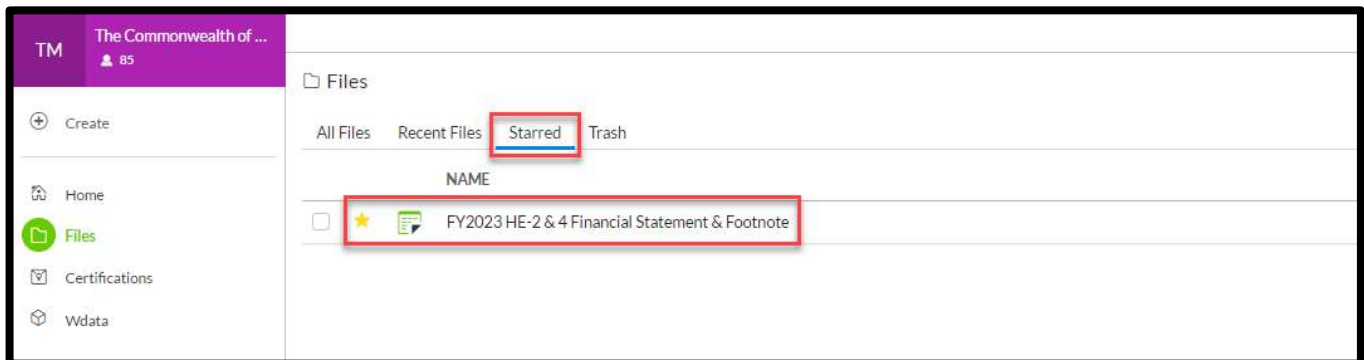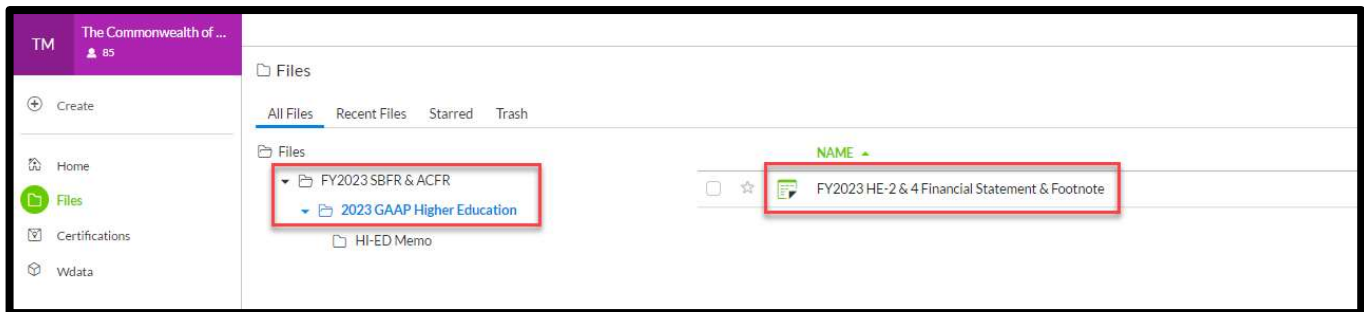
Features of Wdesk

Ribbon

Most of the ribbon at the top will be locked because the cells you will be entering data into are locked for editing. There is one tab group called View that can be helpful. The Show/Hide section allows you to show/hide the source and formula triangles, gridlines, formulas, comments, and attachments.
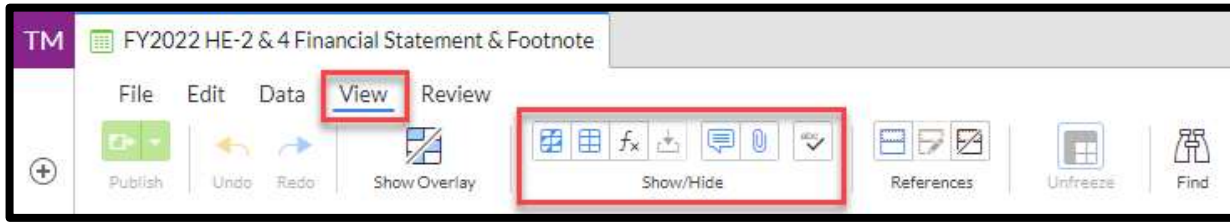

Right Side Toolbar

On the right-hand side is the toolbar for different features within the worksheet. The three main features you might be using are **comments, history, and attachments**.

Comments can be very useful, just like in Excel, to let others know about certain cells and any additional information. You can also @ someone to notify someone about a comment you posted. For example, you can @BrianJohnson and type in your comment, and I will get an email message saying so-and-so sent a comment to me on this particular worksheet and displays the comment. A very useful tool to get in touch with myself, Cathy or Pauline with any questions.
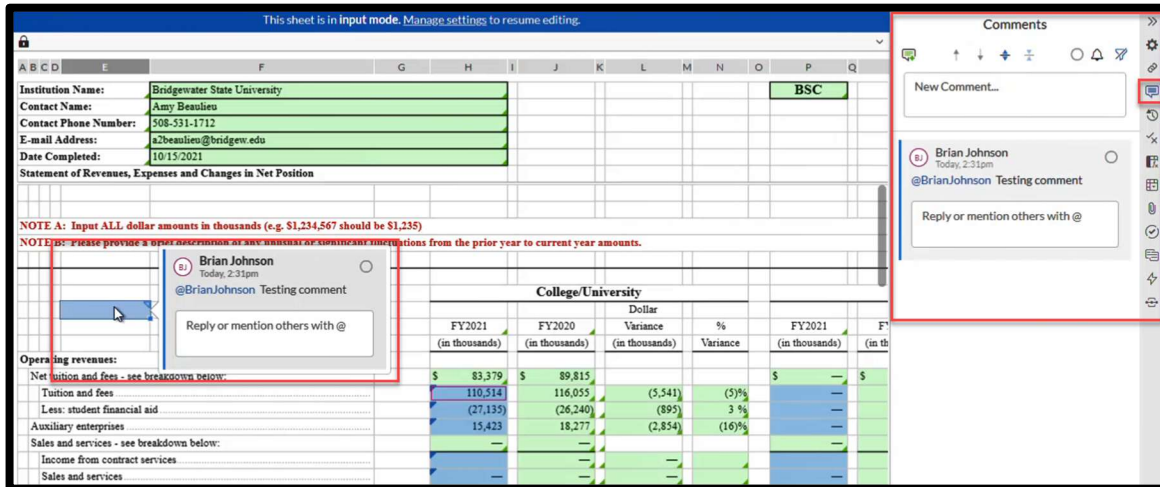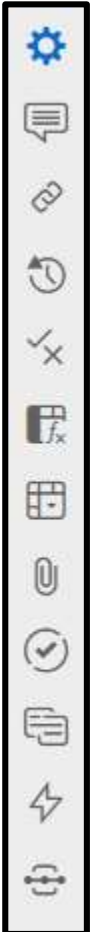
Another feature is the **history section**, which will show worksheet-wide changes to the worksheet and who did them. By clicking on previous history points in time you can go back to see that version. You can also see cell-by-cell the history of each cell to see how it has changed and by whom.


There is also the **attachment section**, where you can select a cell and attach an excel document, word document, pdf, or even an email message to that cell. That way you can provide further backup or more information about certain numbers, if necessary.

Outline

On the left-hand side is the **Outline** of the worksheet. Each institution will only be granted access to see their own HE-2 & 4 tabs, along with this Instructions sheet. **You click on the arrow to the left of your institutions name** and all the tabs on the Excel version of the HE-2 & 4 will appear. The number of comments also are shown to the right of the name of the tab, along with a **status indicator**, which can be used by anyone to **indicate different statuses like "Not Started" "In Progress" and "Final".**

Entering in data

Each tab for your institution will be in input mode, which you can see by the blue bar at the top of each sheet. Input mode allows only data entry into the worksheet in predetermined cells, which are highlighted in blue. Any cell highlighted in green indicates a prior year number or a formula. **Only the blue highlighted areas are allowed for data entry**, which is to prevent accidental adding or deleting rows/columns, changing formulas, or any formatting. If there are any incorrect amounts for prior year or formula based cells, or if you need to enter information where you can't, please put a comment in the cell(s) and @BrianJohnson in the comment.
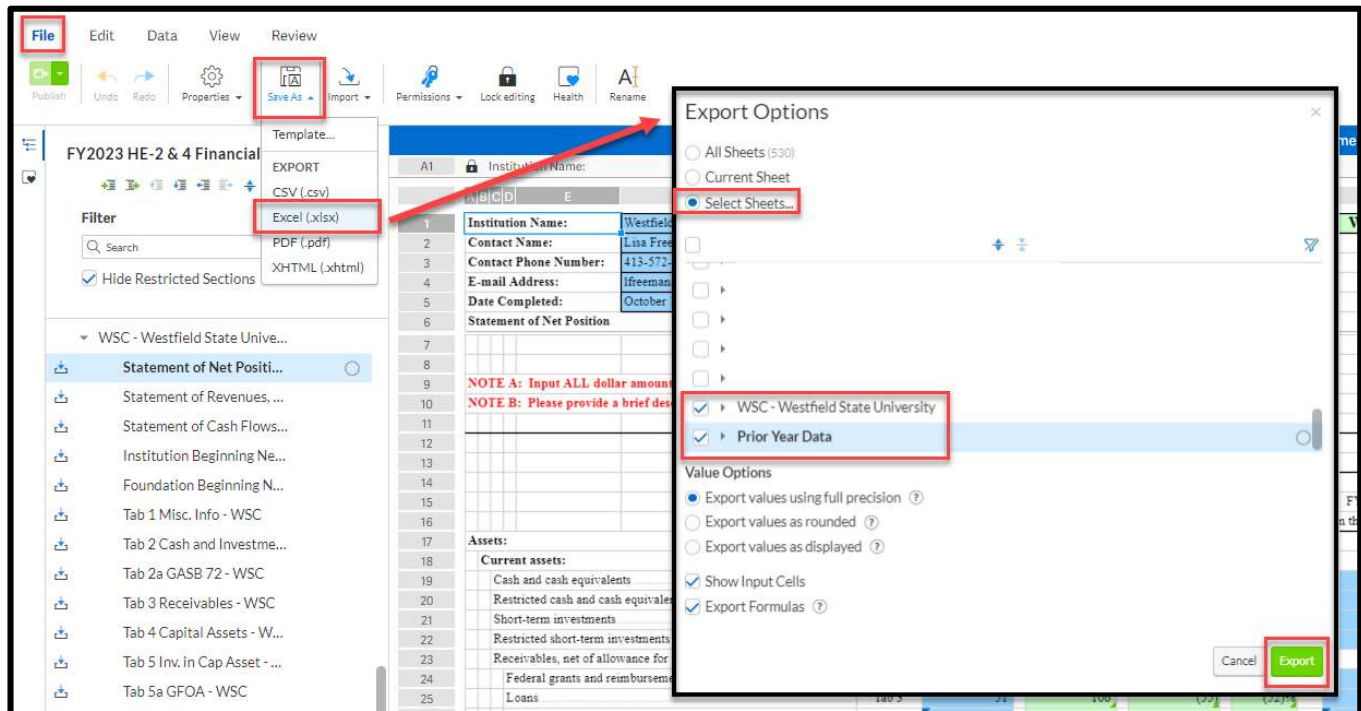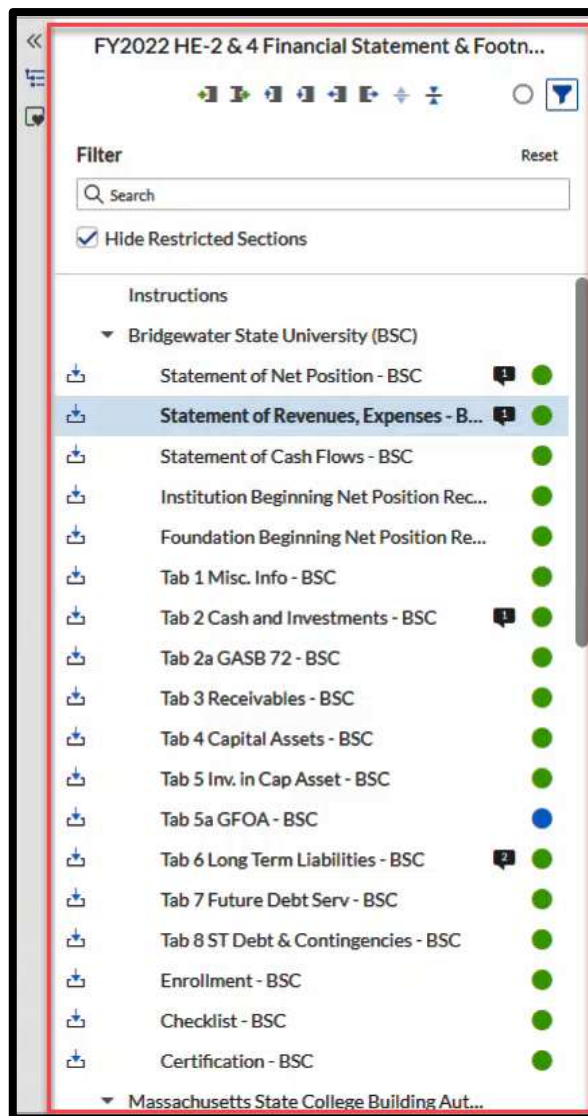
Auto save and publish changes

While you are entering in data into the various sheets, **everything auto saves in the Wdesk application**. There are some cells, indicated by the blue triangle at the top left of the cell, which are source links to cells in other workbooks in Wdesk (going to combining sheets or the ACFR itself). When there is a red bar below the blue triangle, this means there is a change to the cell that needs to be shared to update the cells linked in other workbooks. **You can share changes by hitting the publish button at the top left**.
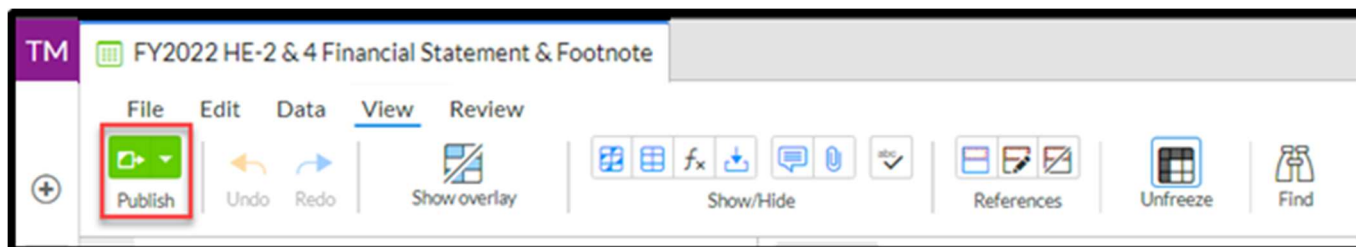
Exporting to Excel

First make sure you are on the File ribbon section and click on "Save As". You will get a drop-down menu to select different ways to export, one of which is to export to Excel, click on that option. This will bring up a box for your exporting options. You may see a warning that you are unable to export, ignore that. Click on the option for "Select Sheets…" and also click on the icon to collapse all the sheets, looks like this: ⯯ Then scroll till you find your institution and click on the box to the left. Additionally, scroll all the way down and select the box for "Prior Year Data". Finally, hit the green Export button at the bottom right. Your browser will download the GAAP Transmittal in Excel format. See below for example on the steps for exporting.