FY2025 Wdesk Guide for Higher Education Reporting

How to get to Higher Education Reporting in Wdesk

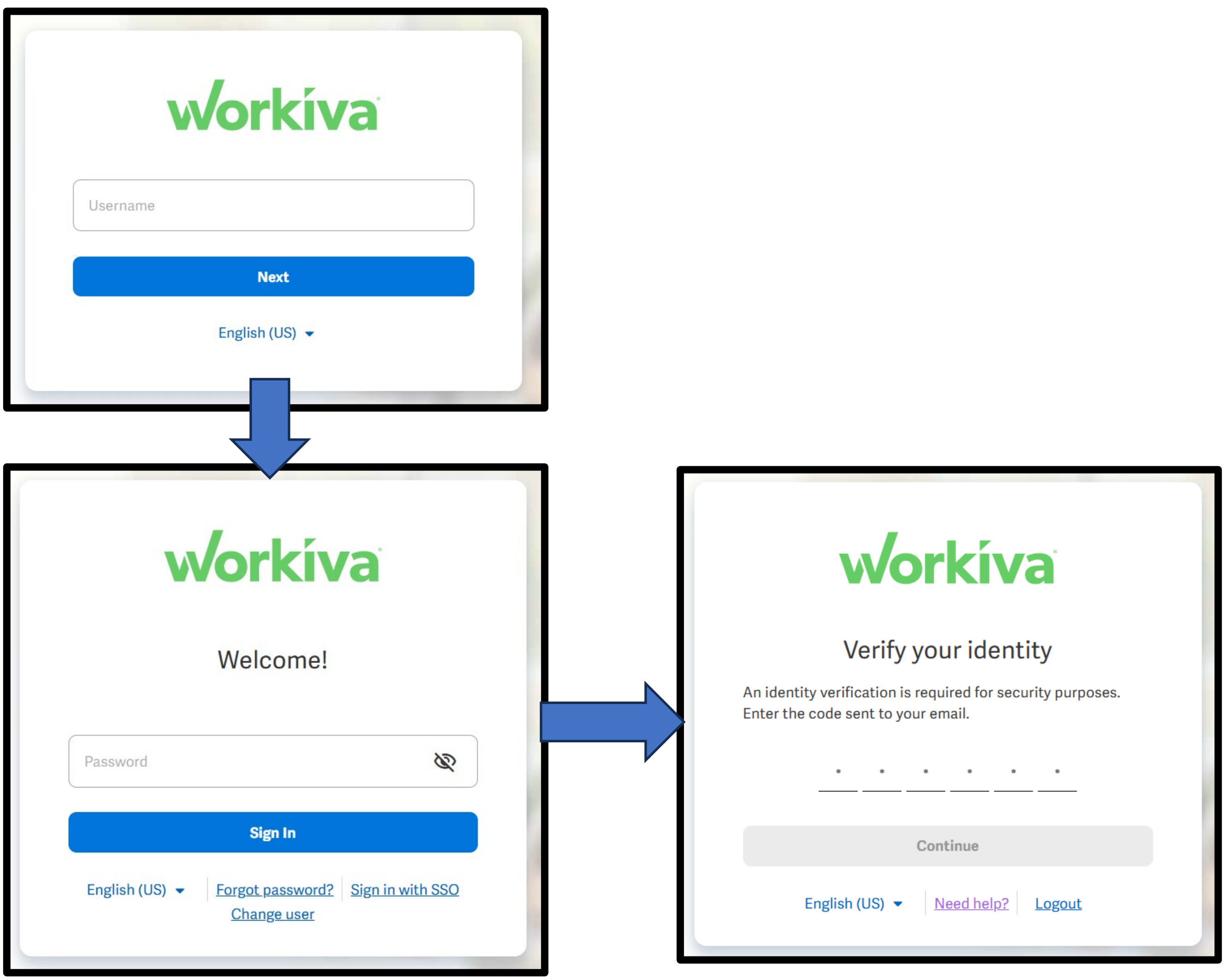
The preferred browser to use Wdesk is Chrome. Alternatively, the Edge browser is also compatible with Wdesk, but Chrome works best.

Website link and login

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

This is the login screen for Wdesk, **please enter your email address on the first screen, then your password on the next screen***. You also might be prompted for an identity verification, which you will get an email from notifications@workiva.com, 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 Wdesk (NEW)

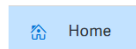
Once you have logged in, the first page you see is the home dashboard. This dashboard has been curated for you so the file(s) you work with and additional information is all in one location, right as you login to Wdesk.

The **Key Resources** widget has links to the worksheet(s) and folder(s) that you will be using. See #1 in below screenshot.

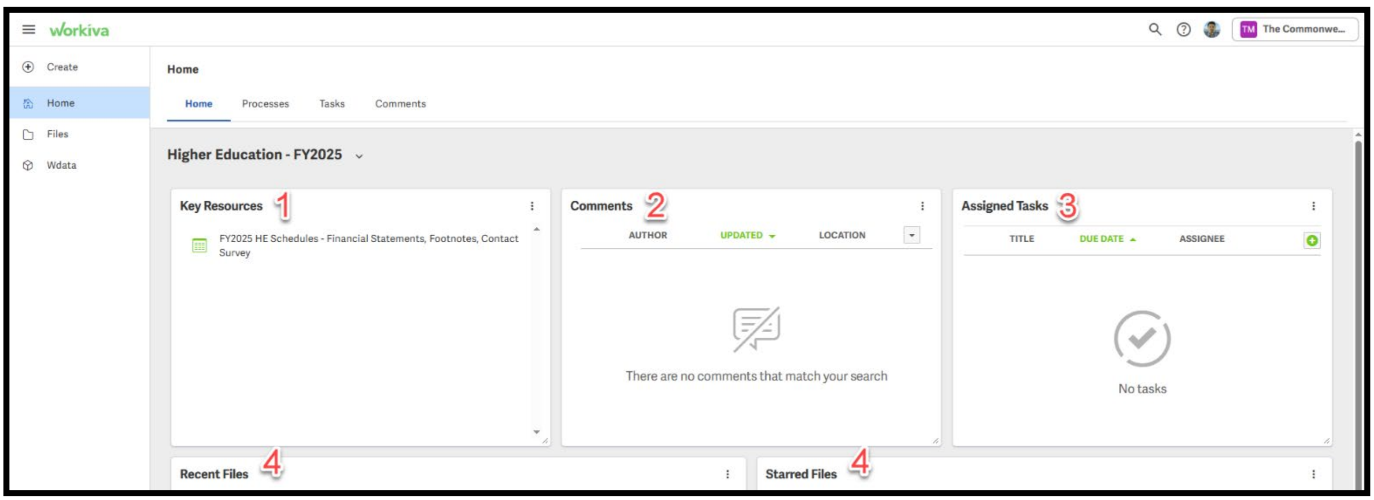
The **Comments** widget will show all open status comments with links directly to where the comment appears. See #2 in below screenshot.

The **Assigned Tasks** widget will show (if you are the primary preparer or approver) the task assigned to complete the GAAP Transmittal. See #3 in below screenshot.

The bottom two widgets, **Recent Files** and **Starred Files** will show any files most recently viewed and any files you have starred. See #4 in below screenshot.

To get back to this dashboard, all you need to do is click on the **Home icon** 

on the left-hand side toolbar.



To access the Higher Education Schedules, under Key Resources, **click on the spreadsheet file called "FY2025 HE Schedules – Financial Statements, Footnotes, Contact Survey"**

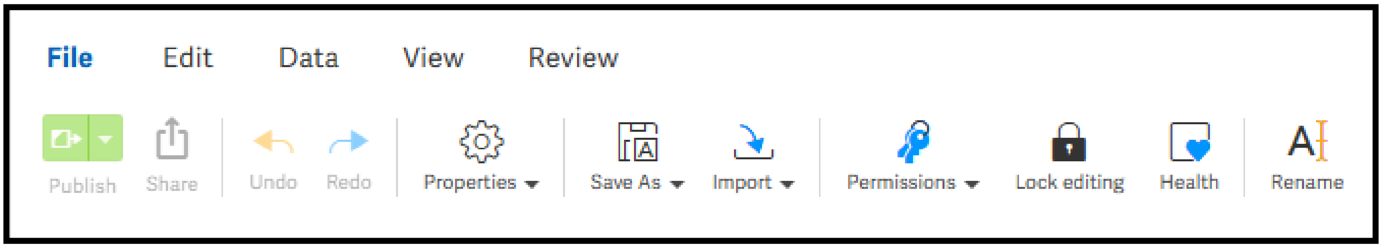
Features of Wdesk (UPDATED)

Ribbon/Toolbar

Features common for each grouping listed below are:

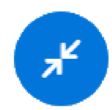
- The Publish button is used to share information you entered into the spreadsheet that is linked directly to another worksheet within the Wdesk application. See Auto save and publish changes (Page 7) section below for more details.
- Undo or Redo actions, which has the same functionality as Excel.

File – This grouping has the "Save As" feature, which allows you to save a copy of the sheet(s) to Excel. See Exporting to Excel (Page 8) section below for more details.



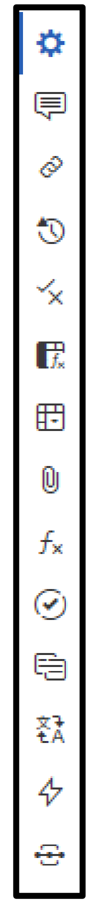
Edit – This grouping will be mostly disabled because the sheets will be in input mode. See Entering data section below for more details on input mode.

View – This grouping allows you to turn off or on the visual indicators seen on the spreadsheets, see Show/Hide area in the below screenshot. You can also enter Full screen for the Wdesk application within your browser. Once you are in full screen mode, you can exit it with the blue arrow icon (see right) at the bottom right corner of your screen.

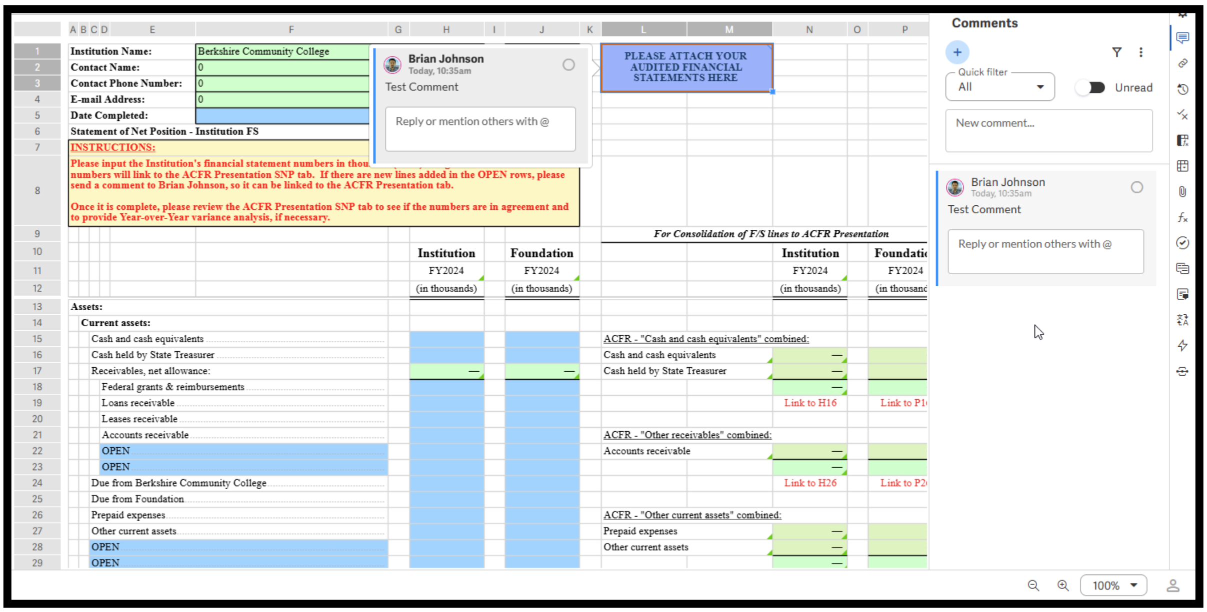


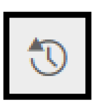
Right Side Toolbar

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

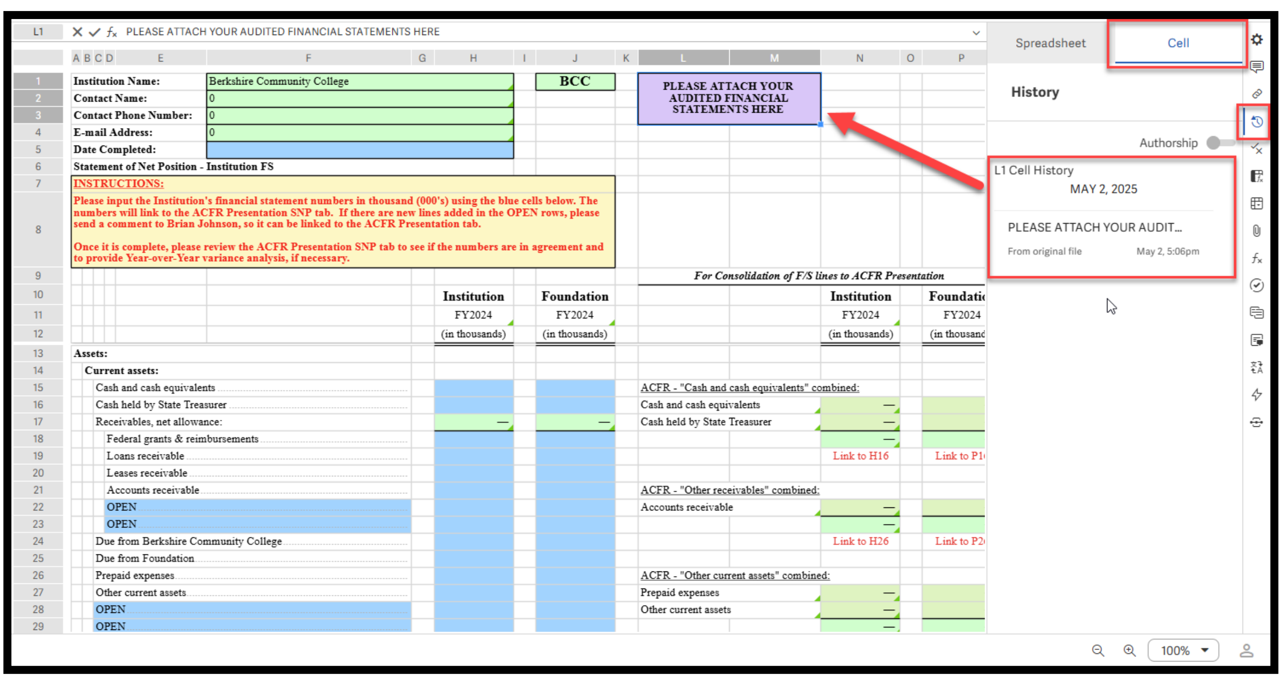


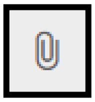
The **Comments** feature in Wdesk, similar to Excel, is a great way to let others know about certain cells and any additional information. You can @ someone to notify them about a comment you posted. For example, you can enter "@BrianJohnson", type in your comment, then post the comment. Please note that there is no space between @ and the name of the person that you are sending comments to. Brian will then get an email message, notifying him who sent a comment, where the comment is located in Wdesk, and the content of the comment. You can communicate between your team members and CTR staff through comments, as long as they have a Wdesk account.





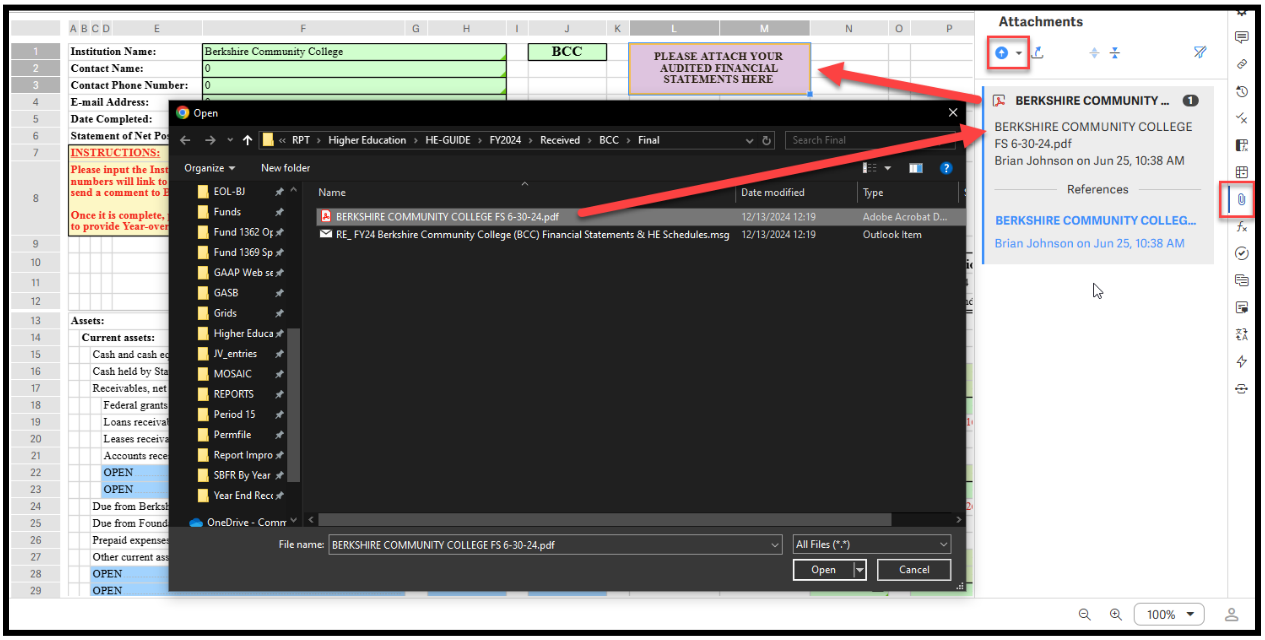
The **History** feature, shows all changes and who made the changes. The Spreadsheet tab allows you to click on previous dates to go back and see previous versions of the spreadsheet. You can also see the history of each cell: how it has changed over time and by whom.



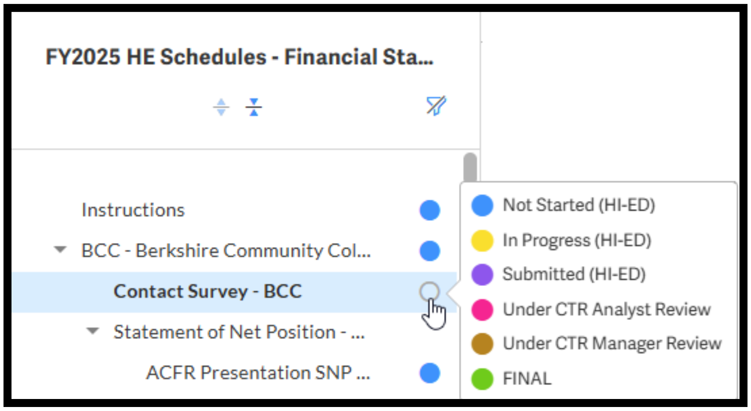


The **Attachment** section is where you can attach an excel document, word document, pdf, or even an email message to a particular cell. This allows departments to provide further backup or more information about certain numbers, if necessary.

To attach a file in Wdesk, first select the cell you want to attach the file to. Then click on the attachment icon on the right side toolbar. Click on the blue circle with an up arrow. A Windows Explorer popup will appear, allowing you to find and select which file you want to upload. Once you have selected your file, hit open and the file will import to become an attachment in Wdesk. An orange outline of the cell will appear once completed, showing there is an attachment in that cell.



Left Side - Outline



On the left-hand side is the **Outline** section of the spreadsheet. Each HIED Institution will only be granted access to see their own HIED Schedules, along with the Instructions sheet. **You click on the arrow to the left of your institution's name** to either collapse or expand to see the sheets below your institution name. The number of comments are shown to the right of the name of the sheet.

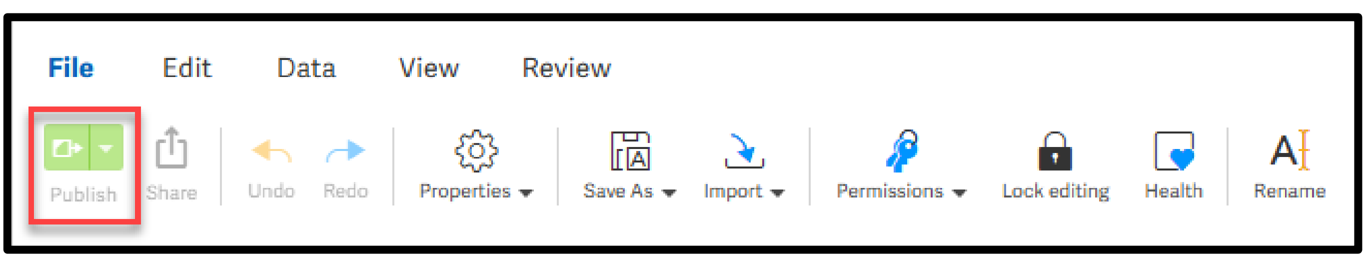
There is also the **status indicator**, which can be used by anyone to indicate the different statuses the particular sheet is currently in. There are **"Not Started (HI-ED)", "In Progress (HI-ED)",** and **"Submitted (HI-ED)". Please update the status for each sheet as necessary with those 3 statuses.** The other three statuses "Under CTR Analyst Review", "Under CTR Manager Review", and "FINAL" are used only by the CTR team.

Entering in data

Each sheet for your institution will be in "input mode", which you can see by the blue bar at the top of each sheet (see below screenshot). You do not need to "have edit access reenabled", that is in reference to the non-input enabled cells. 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. When there is a red bar below the blue triangle, this means there is a change to the cell that can 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

You can download an Excel version of the HE Schedule tabs for your records or to work on it offline. To download, go to the **File** grouping and click on "**Save As**". You will get a drop-down menu to select different ways to export, one of which is called "**Excel (.xlsx)**", click on that option. This will bring up a box for your exporting options. You will see a warning at the top of the popup that you are unable to export, ignore that. Click on the option for "**Select Sheets…**" and then **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**. Finally, **click on the green Export button** at the bottom right. Your browser will download the HE Schedules in Excel format.