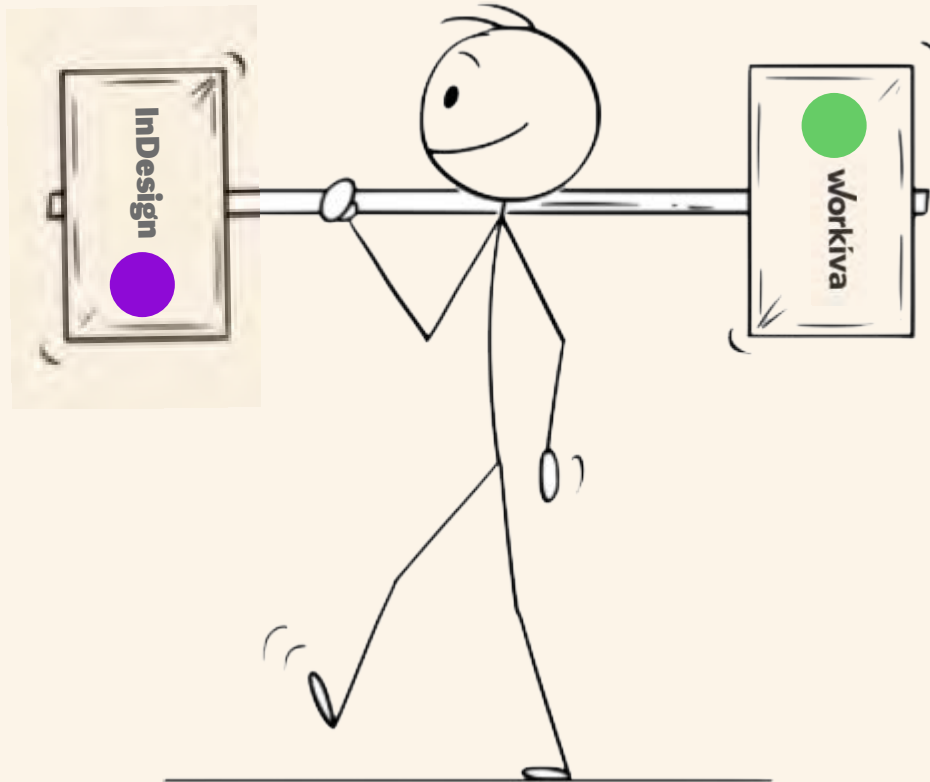
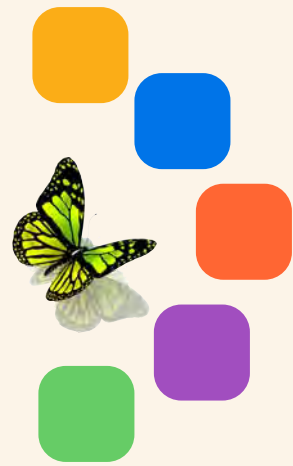


The Widget

Quick start series



Quick start guide to designed reporting with Workiva!

1

Set up the style guides in Workiva



STRATEGIC REPORT

| | |
|---------------------|------------------|
| Bodytext | Superscript |
| BodyTextBold | Subscript |
| BodyTextSpaceAfter | Quote |
| BodyTextSpaceBefore | SmallQuote |
| BodyTextNoSpace | FirstStand |
| BodyTextIndent | KPIFigs4 |
| BulletedList | KPIFigs5 |
| DashList | SubHead1Red |
| NumList | SubHead2Red |
| Heading1 | SubHead3Red |
| Heading2 | SubHead4Red |
| Heading3 | BulletedList1 |
| SubHead1 | BulletedList2 |
| SubHead2 | BulletedList3 |
| SubHead3 | |
| SubHead4 | FirstStand |
| SubHead5 | FirstStandBig |
| SubHead6 | FirstStandBigger |
| SubHead7 | |

Suggested names

GOVERNANCE

BodName
BodPosition
BodAge
BodBio
BodCommittee
CommitteeHeading
CommitteQuote
CommitteeList

RisksHeader
RisksSubHead1
RisksSubHead2
RisksSubHead3
RiskBody
RiskBodyBold
RiskList

FINANCIALS

TableFigs
TableFigsBold
TableText
TableTextIndent
TableTextBold
TableFigsSmall
TableFigsBoldSmall
TableTextSmall
TableTextIndentSmall
TableTextBoldSmall
TableHeading
TableList1
TableList2
TableList3
ColHead
ColHeadBold
ColHeadLeft
ColHeadLeftBold
ColHeadCentre
ColHeadCentreBold
Notes
Footnotes
FootnotesIndent

Apply a style to all content

2

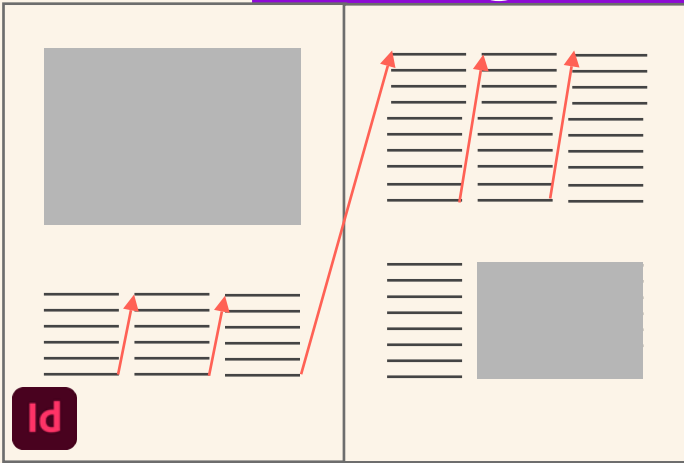
Export content from Workiva via **ICML**



Into InDesign

3

Arrange ICMLs in InDesign to create **design**



ICML can fill one or multiple **linked** text frames

4



● Add **extra styles** for **non** Workiva content like picture captions

● You can also change style attributes in InDesign

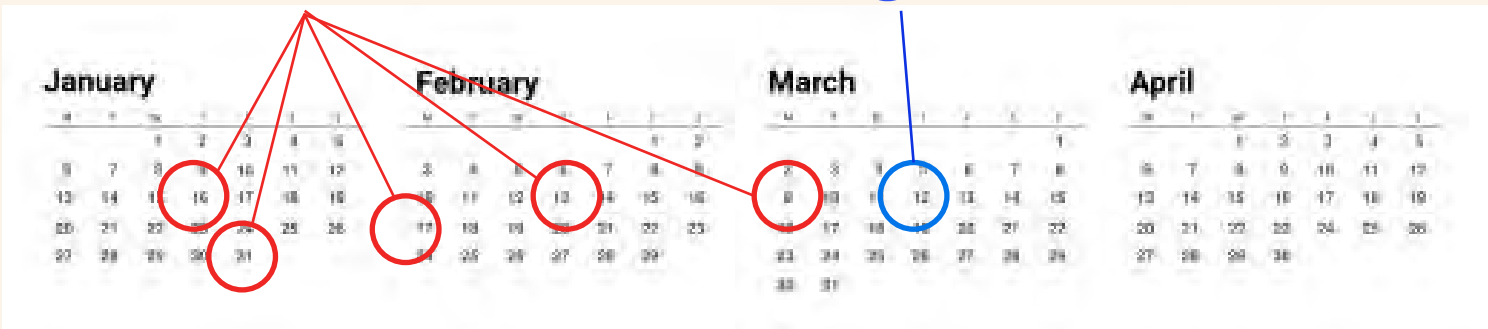
5

Content **updates** are sent to you via ICML when **necessary**

● Remember you are designing for a website!

Receive ICMLs

Filing date





Check
your
document



Ready to
see the
design in
XHTML?

1. Ungroup all InDesign items.
2. Unlink all ICML files.
3. Split all linked text frames.
4. Remove hidden layers.
5. Advisable to have only RGB colours.
6. Upload fonts if not in Workiva.
7. Make sure there is no overmatter.
8. Do not use tabs or overrides.
9. Read [The Widget!](#)

See full designer's checklist on back page.

Don't worry
about
iXBRL. This
happens in
Workiva

7

Export as IDML from InDesign



Upload the IDML to the Workiva platform

● **Override** the XHTML in Workiva with your new file

Then your design

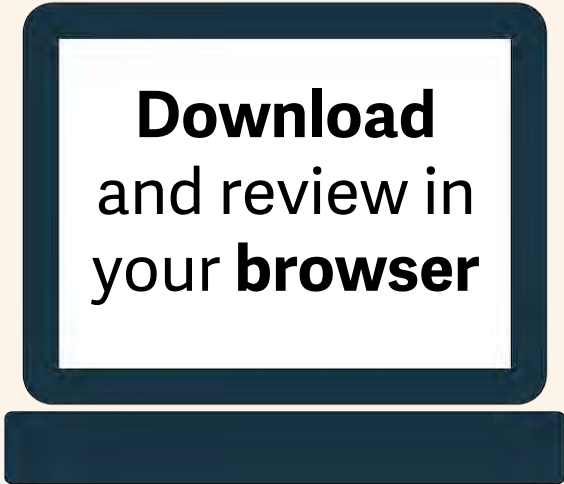
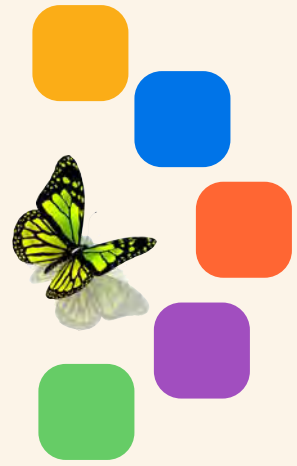
becomes


+

XBRL


=

 **iXBRL**



Download
and review in
your **browser**

**As many
times as
you like!**

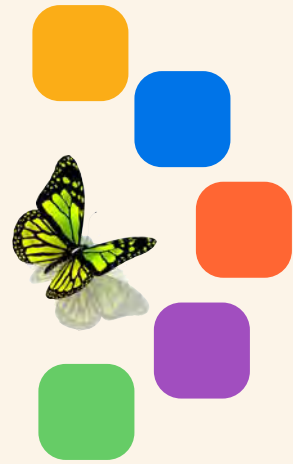
5 10 20 30+

Remember!



Repeat **all** steps until
you are **happy!**

Designer's checklist for IDML > HTML



1. Ungroup all InDesign grouped items.
2. Unlink all ICML files before splitting text frames. This can be done in the links panel.
3. Split all connected text frames using the split text frame script in InDesign scripts pallet.
4. Remove any hidden layers or layers used for admin purposes.
5. All images to be placed at 72 or 144 dpi, RGB and cropped to the image frame. This will reduce the file size dramatically.
6. Use SVG only for resolution-less vector graphics (not bitmap images - these are to be jpg or png).
7. Make sure there is no overmatter.
8. Do not use tabs or overrides.
9. When uploading IDML it is best to create an InDesign package so you can upload the fonts as well. You do not need to upload the .INDD file. You only need the IDML file and the fonts as a single zip file.
10. Read [The Widget!](#)