

# Platform

## The Widget Design

A designer's guide to designing on the Workiva platform

Workiva Proprietary Information

workiva®

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# Welcome

## Symbols



Jurisdiction differences to be aware of



Link to videos or webinar



Link to pdf material



Premium feature available - See Widget Premium

All information, content, and materials available in this document are for general informational purposes only. The content on this posting is provided "as is;" no representations are made that the content is error-free or up to date. Designers should always test their design in XHTML often and keep back-up files at all times.

Please check you have the latest Widget. Go to [Design Reporting Support Hub](#) to download.

## Introduction

Welcome to Workiva! We are a cloud-based reporting compliance platform that enables the use of connected data. Workiva is also a great platform for design. Follow these guidelines for the best experience for you and your client.

The Widget is your design reference and accompanies many online video workshops to help get you started.

Workiva is flexible regarding design. Design can be achieved within the Workiva platform, exporting content to Adobe InDesign or a mixture of both.



The Widget Platform guidelines gives you all the guidance about achieving design within Workiva.



The Widget InDesign guidelines contains information about using content from Workiva and using InDesign to create the design.

More details can be found on [here](#) so make sure you have the right Widget as your resource. The [Widget Export for web](#) is also available.

# Signposts

## Designed Reporting Support Hub

[\[Bookmark this\]](#) so you can find it again easily! The hub contains a wealth of resources which will make your journey to structured data with design worthwhile.

## Watch a webinar!

[\[Quick look to how design works with Workiva\]](#)

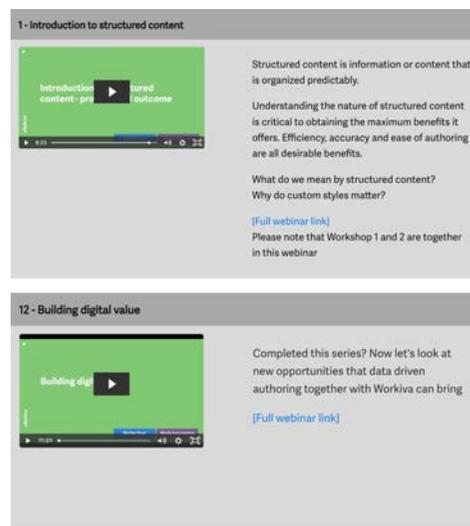


[\[See how a client and agency works together\]](#)



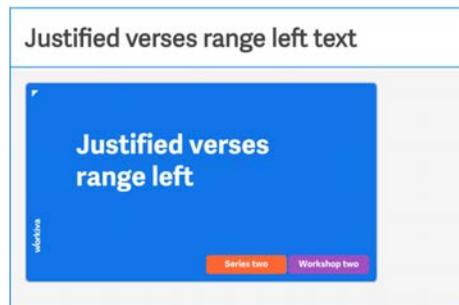
## Watch a workshop!

These workshops take you on a journey from an 'Introduction to structured content' to 'Building digital value' - for designers and clients.



## Are you stuck?

We have many short videos addressing individual topics. Don't struggle or get frustrated - check out this section on the [designed reporting support hub](#).



## Why not get certified?

On the Workiva Learning Hub, there are three modules for designers to receive a certification award.



[\[Design Reporting: Starting off the right way\]](#)

This module is for designers new to Workiva. We introduce the power of structured content and ways designers can use Workiva. Join us on a tour of the platform as we show you the best way to start your project for best results further down the line.

[\[Using Workiva and InDesign\]](#)

Module two looks at on-platform communications for designers, flowing content to Adobe InDesign while maintaining 100% data assurance, and managing exports and RGB and CMYK workflows in a way that meets your online and print quality requirements.

[\[Workiva, a design platform\]](#)

Here we explore using Workiva for all your design needs. Find out about design tools for creating charts, using presentations, and pushing content online via the Workiva web API.

# Signposts

## Getting started guides

If you are new to Workiva and are looking for a quick guide as you get more familiar with Workiva and Design Reporting, start here with our Quick Start Guides! Available in German, Italian, Swedish, French, Spanish and English. Find them on the [Design Reporting Support Hub](#).



## The Widgets

The Widgets - Platform and InDesign Integration are your guide on how to use Workiva and best practices for the whole design process. Download the latest edition on the [Design Reporting Support Hub](#).

## Help guides

Short, visual instructional guides to aid in quick understanding of the processes. Available for download on the [Design Reporting Support Hub](#).



## General platform support

If you need support about the Workiva platform, there are many resources at [\[Workiva Support\]](#). Here there is information on XBRL, Wdata, documents and spreadsheets all the way to filing.

If you are new to Workiva, there are loads of basic guides to the Workiva platform [\[here\]](#).

## Need to contact a human?

So what do you do after you have checked all the help material? The best way to find further help is to contact the Customer Success Manager. This CSM is the person dedicated to your client's account. They can help you straight away or direct your question, if design related, to Workiva's Design Support team.

## Out of hours

If you are logged into a Workiva account, you can submit a ticket at [\[Workiva Support\]](#). A member of the Support staff will respond quickly. This support is 24/7.

# Core Essentials

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## Core Essentials

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# Making the decision to use Workiva for your design

## How to use Workiva for design

Workiva is totally flexible

Workiva isn't just about the numbers. The platform offers a high level of design capability for your reports that reflect your brand and tell your story. For higher fidelity of design or if you are printing your report, you may still wish to use InDesign, the professional print publishing software.

You can use the platform in many ways for your report:



1

Everything done in Workiva

2

Full InDesign integration

3

Mixing the solutions

4

Splitting the solution

5

Workiva only for financials

## Options to discuss with your client

1. This is why Workiva was built! Everyone works together in the same workspace from authors and audit, narrative and numbers and yes, designers. Your PDF, XHTML and iXBRL file if required are all generated straight from the platform looking exactly how it looks in Workiva.
2. If the whole report is to be designed completely out of the platform, you can do this too, still with all the data assurance that Workiva brings. Please read **The Widget - InDesign Integration** for this option.
3. For some reports, higher fidelity of design may be required only on some pages. Please read **The Widget - Design Integration** for this part of the report. As with option one, all content is authored, tagged and audited in Workiva. Content in Workiva that requires more design work can be sent to InDesign but still linked to the platform. For PDF output, content can be exported from Workiva and InDesign and stitched together. If XHTML is required, the InDesign pages are imported back to Workiva for conversion. Please note that InDesign content is not used to update content in the Workiva platform. That content is only converted into XHTML.
4. Some clients choose to file straight out of Workiva but produce the PDF from InDesign. All the content is authored in Workiva so that the content of both versions remains identical. Discuss with your client about the design requirements of the filing version.
5. Some clients use Workiva only for the financial section. The rest of the report is created elsewhere.



Workiva and Design



Getting creative with Workiva webinar



Your design journey with Workiva PDF on design reporting support hub







# Style setup

Take time to set up styles properly at the start of your project - it really does save time later

It is best practice not to use the 'Normal' style in the Workiva platform. Turn default 'Normal' to pink to identify this un-styled content.

Table styles do not import from Word, so any Table styles will also need to be applied to at least one line of copy (outside of a table) for that style to appear in the custom style palette. Those styles will then need to be applied to all the tables on the platform.

## Quicker application of styles

Text can be selected in a whole section and a style applied but generally you wouldn't want to style a whole section in one style (unless it's brand new copy and applying one style is the ideal starting point).

If however, you have a style you need to apply throughout a section or an entire report quickly and consistently then the best method may be to use the format painter.

The format painter is in the Edit menu and to use, you just need to do the following:

1. Select the style you wish to copy with your cursor.
2. Click once on the Painter icon and a border will appear around it showing the style is loaded.
3. Click the copy you wish to apply that style to.

If you want to apply that style to multiple lines of copy, in more than one location, then at step 2, double-click on the Painter icon (which will give you a thicker border around the icon) and apply. The style will remain loaded and be applied until you click on the icon again to switch it off.

Be aware that if used in a table, cell styles and rules will also copy (top, left, right and bottom rules), so it may be simpler to apply styles in tables manually.

### Format painter icon



### Format painter icon after 1 click



### Format painter icon after 2 clicks





# Document setup

It is important to set up the report correctly in the Workiva platform. Take your time now by doing the following:

## 1 Format consideration

It is important in a multichannel publishing scenario to establish the page format, margins and gutter measurements right from the outset.

Things to consider:

### Landscape v portrait

Traditionally most annual reports use a portrait presentation but increasingly landscape is being used for better onscreen consumption.

### Spreads

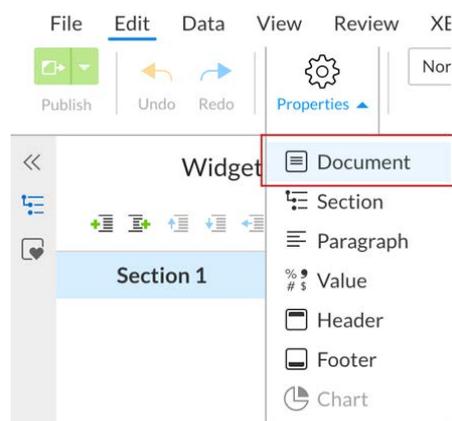
The concept of spreads is limited within the current iXBRL inline reader. Designers need to be careful when relying on a spread to convey information as this will be broken into two separate consecutive pages. It is possible with the help of web development to present spreads within the inline viewer, so please talk to your web team if spreads are required as part of the inline viewer experience.

### Mirrored margins

Often, in the case of a document going to print, the inner margin will be wider than the outer margin because of the act of stitching. This can present a problem of readability when presented digitally in both PDF and XHTML. Consider adjusting margins for digital presentation.

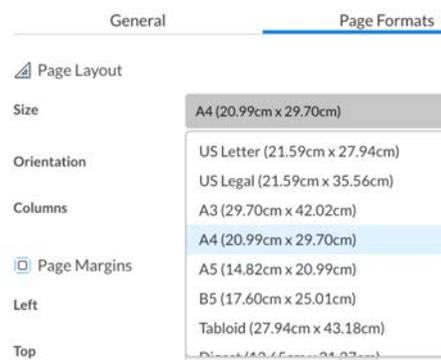
## 2 Setting the documents page size

A documents page size can be set in the File / Properties menu.



In the Document panel there is a Page Formats tab, where the Page size can be selected.

### Document Properties



## 3 Margins and gutters

Margins and gutters can be set for the whole document. See our dedicated section for instructions on how to do this. [\[link\]](#)

## 4 Setting the document outline (index)

The document outline represents the structure of the document. The document can be split into parent sections and child sections.

## 5 Create your style palette

All content in the Workiva platform should have a style attached to it. See our dedicated section for instructions on how to do this. [\[link\]](#)



**Jurisdiction considerations - mirrored margins in XHTML**



**Jurisdiction considerations - use of spreads when opened in an inline viewer**

# Document setup

## 6 Headers and footers

[[Headers and footers](#)] can be generated in the Workiva platform. See our dedicated section for instructions on how to do this.

## 7 Typesetting

Typesetting takes place in the Workiva platform. In multi-channel publishing, best practice is to not use a soft return. A soft return is when you press Shift Enter. This creates a line break rather than a paragraph break. You can see your soft and hard returns by pressing the Show/hide non-printing characters on your Edit ribbon.

If words are not to be broken, a name of a director for example, then use a non-breaking space in between. Go to Insert>Symbol>Special Characters>Non-breaking Space. There is also a keyboard shortcut.

### Non-breaking space

#### PC

CTRL + Shift + Space

#### Mac

CMD + Shift + Space

Use the line spacing properties in the Style Editor rather than soft returns

Use a non-breaking space if a word is not to be broken - Insert > Symbol > Special Characters > Non-breaking Space

Measurement units can be set in the Document Properties panel

## Document Properties

×

GeneralPage FormatsTable Formats

Name

Widget screenshots

☰

?

Type

None

▼

Creation Date

June 20, 2022 2:51 PM

Sections

1

☰ Preferences

Keep lines together

Widow orphan control

Allow editors to publish all links

Use smart quotes

🔑 Permissions

Can Send For Review

Owners only

▼

Can Approve Track Changes

Owners only

▼

🌐 Language & Formats

Locale

English (United Kingdom)

▼

Spellcheck

On

▼

Number Formatting

100,000.00

▼

Currency Symbol

£ (GBP)

▼

Default Date Order

Day Month Year

▼

Symbol Align

None

▼

Measurement Units

Centimeters

▼

Close

# Margins and Gutters

A margin is the space to the top, bottom and sides of a document. A gutter is the space between your columns.

## Page margin

The page margin can be set as a document default but can be overridden at section level.

### Setting the document default margin

The document margin setting is accessed through the 'Properties' menu. Properties/Document/Page formats.

Page Margins

Left	<input type="text" value="1"/> cm	Right	<input type="text" value="1"/> cm
Top	<input type="text" value="3"/> cm	Bottom	<input type="text" value="1"/> cm

### Changing the section margin

The section margins are changed in the Section Properties panel. This can be accessed from the right-hand menu and will display the settings for the currently selected section.

Changing any section margin will override the document default for that section. You can easily see if a section margin has been overridden, as an arrow will appear next to the changed margin. Clicking the arrow will restore the default for that margin.

Section Properties

Layout

Section Size: A4 (20.99cm x 29....)

Orientati...

Columns:  Gutter:  cm

Margins

Left	<input type="text" value="1"/> cm	Right	<input type="text" value="1"/> cm
Top	<input type="text" value="3"/> cm	Bottom	<input type="text" value="1"/> cm

Section Properties

Layout

Section Size: A4 (20.99cm x 29....)

Orientati...

Columns:  Gutter:  cm

Margins

Left	<input type="text" value="1"/> cm	Right	<input type="text" value="2"/> cm
Top	<input type="text" value="2"/> cm	Bottom	<input type="text" value="1"/> cm

## Column gutter

The column gutter can be set as a document default but can be overridden at section level and/or a paragraph level.

### Setting the document default column gutter

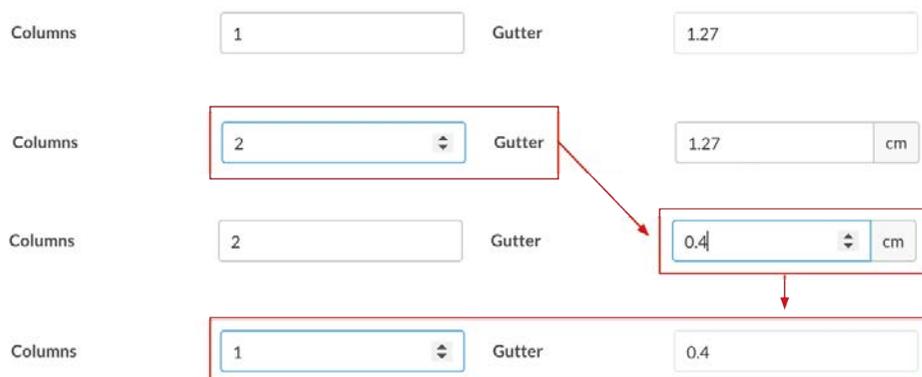
The column gutter setting is accessed through the Properties menu - Properties/Document/Page formats

Please note that the gutter measurement is not selectable until more than one column has been entered in the columns box.

Once this has been done, then the gutter can be altered.

# Margins and Gutters

You can then change the default columns back to one if you wish but the new measurement you entered for the gutter will remain.



Columns	1	Gutter	1.27
Columns	2	Gutter	1.27 cm
Columns	2	Gutter	0.4 cm
Columns	1	Gutter	0.4

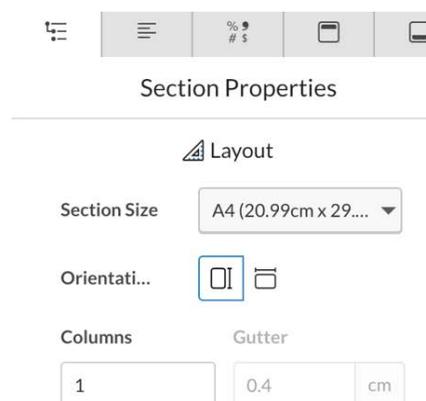
## Changing the section level column gutter

The section column gutters are changed in the Section Properties panel. This can be accessed from the right-hand menu and will display the settings for the currently selected section.

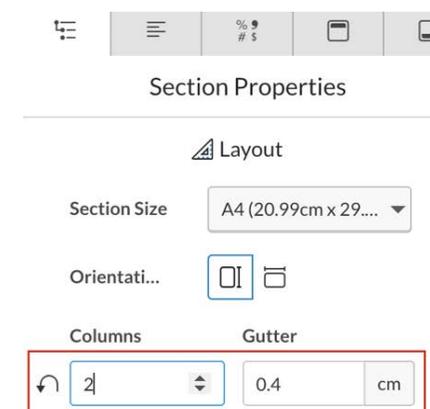
As with the section margin, a curved arrow (see example) will display if the gutter setting has been amended. Clicking the arrow will restore the default setting for that gutter.



More information on Document and Section Properties here at [Workiva Support](#)



Section Properties	
Layout	
Section Size	A4 (20.99cm x 29....
Orientati...	
Columns	Gutter
1	0.4 cm

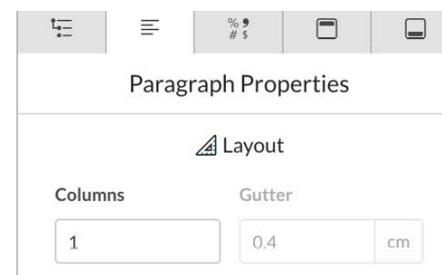


Section Properties	
Layout	
Section Size	A4 (20.99cm x 29....
Orientati...	
Columns	Gutter
2	0.4 cm

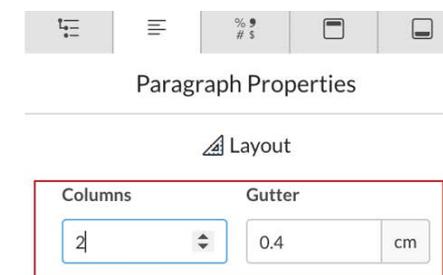
## Changing the paragraph level column gutter

The paragraph column gutters are changed in the Paragraph Properties panel. This can be accessed from the right-hand menu and will display the settings for the currently selected paragraph.

Changing any paragraph column gutter will override both the Document and Section settings for that paragraph.



Paragraph Properties	
Layout	
Columns	Gutter
1	0.4 cm



Paragraph Properties	
Layout	
Columns	Gutter
2	0.4 cm

# Headers and Footers

The header is a section of the document that appears in the top margin, while the footer is a section of the document that appears in the bottom margin.

Headers and footers can contain additional information such as document titles, page titles, navigation bars, page numbers, dates and footnotes. Text entered into a header or footer will repeat in all linked sections.

## Headers and footers overview

A header and footer are unique to a section, independent of each other and can be set to repeat in following sections.

To access the content of a section's header or footer you will first need to click into the current section's header or footer space.

This should automatically bring up the relevant properties panel to the right.

See the next page for an example.

## Headers and footers Properties Panel explained

### Settings

#### Same as previous section

This section uses the same header as the section before it.

#### Alternating pages

Odd pages use one header, while even pages use a different header. Page numbering works separately to headers, so be aware that if your pagination has an even page header starting on an odd page then the odd page number will be displayed.

#### Different first page

The first page of the section uses a different header than following pages. If alternating pages are also applied, they will begin after the first page of the section.

#### Different last page

The last page of the section uses a different header than previous pages. If alternating pages are also applied, they will end before the last page of the section.

### Position

#### From Top (header only)

To change how far down the page your header starts.

#### From Bottom (footer only)

To change how far up the page your footer starts.

### Margins

#### Left

You can set a different left margin to the one used by the section here.

#### Right

You can set a different right margin to the one used by the section here.

#### Match section margins

Check this box to match the margin width to the entire page

### Page Numbering

#### Insert Page Number

This will insert an automatic page number in the selected header or footer of the current section.

#### Restart section numbering (for both header and footer)

Checking this box lets you select a starting number and style for the page numbering.

### Starts at

#### (for both header and footer)

Here you can set the starting page number for the section

### Style

#### (for both header and footer)

Here you can set the character style for the page numbering for this section

### Automatic page numbering

Insert / Auto Text / Section Page Number. This will insert an automatic page number wherever you have the cursor placed.



**All about headers and footers**

# Headers and Footers

## Header and footer design

Quite complex layouts can be created in the header and footer space of a document on the platform - See [\[Creative layout\]](#).



All about headers and footers



More information on Document and Section Properties here at [Workiva Support](#)

### Header Properties

Section  
Section 1

⚙ Settings

Same as previous section

Alternating pages

Different first page

Different last page

Position

From Top  cm

Margins

Left  cm

Right  cm

Match section margins

Page Numbering

Restart section numbering

Starts at  Style

[Learn More](#)

### Footer Properties

Section  
Section 1

⚙ Settings

Same as previous section

Alternating pages

Different first page

Different last page

Position

From Bottom  cm

Margins

Left  cm

Right  cm

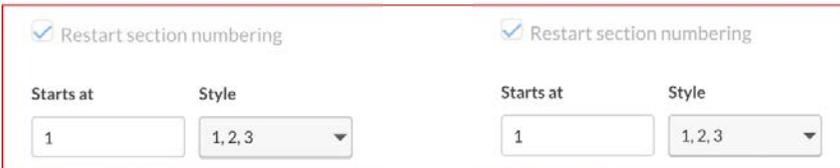
Match section margins

Page Numbering

Restart section numbering

Starts at  Style

[Learn More](#)

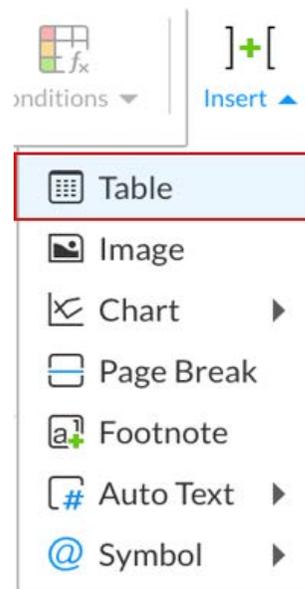


# Table formatting

Table formatting can seem tedious. But with a clear head it is easy to do. A great deal of data contained within tables comes from linked spreadsheets. To find out more about the functionality of linking - the powerful tool for maintaining data integrity, please go to [\[Workiva Support\]](#)

## Creating a table

An empty table can be created by placing the cursor in the line where you wish to insert it, navigating to the Insert menu and clicking table. A default table will be inserted in that location and will fill the width of that column.



A table can sometimes be used for image positioning when placing an image inline doesn't achieve the desired result.

## Cell styles

The Workiva platform does not use cell styles but relies on styling via the ribbon.

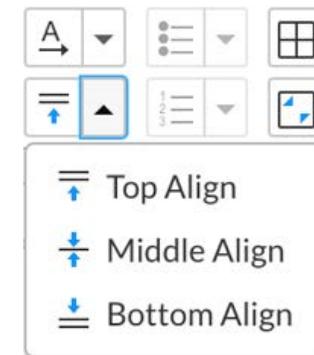
## Formatting a table style

### Applying paragraph styles to a cell

Select the cell or group of cells and pick your desired paragraph style from the style guide.

## Applying alignment to a cell

Select the cell or group of cells and pick your desired alignment style from the cell alignment drop down menu.



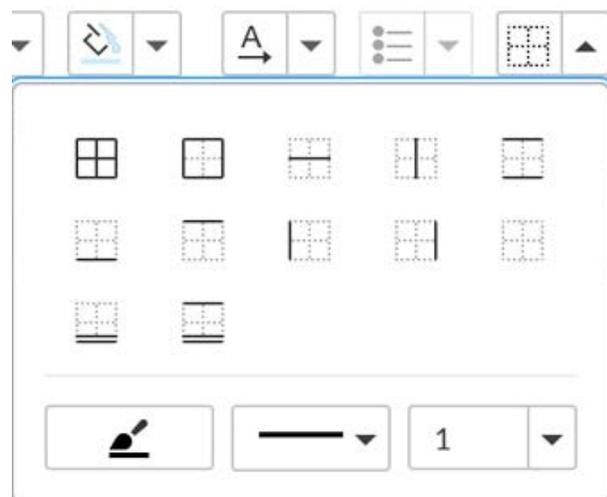
# Table formatting

## Applying rules to a cell

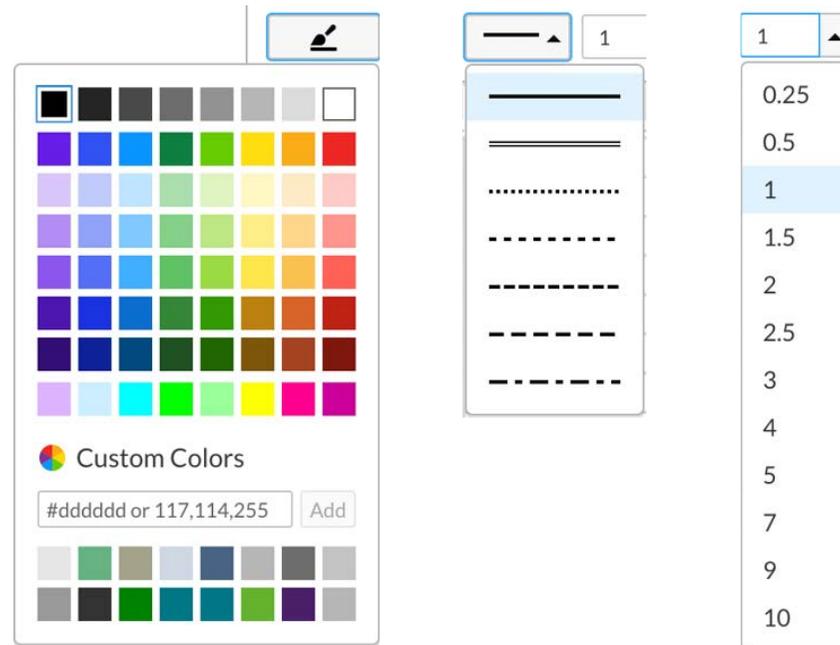
Select the cell or group of cells that you wish to apply a rule or rules to and then from the Edit menu choose the Borders dropdown.



You will now see the following panel which has the controls for setting the rule weight, line style, color and where that rule is to be applied.

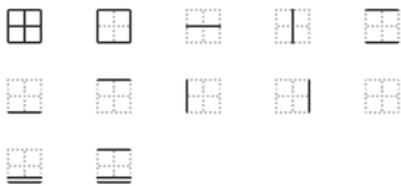


It is important to set the rule weight, line style and color before you click on any of the rule placement options.



# Table formatting

Once you have set your line weight, style and color, then select from the rule placement options below.

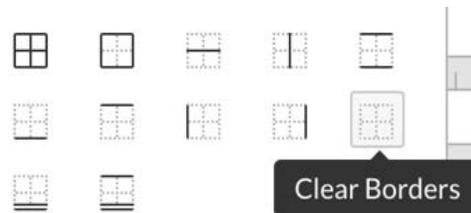


The highlighted edges in the rule placement panel are the edges that your rule settings will be applied to when you click on one.

Clicking once will place the rule settings on the desired cell edges but clicking again on the same style or a new style will not remove the rule, it will only apply the same settings or any new settings you may have chosen.

Your previous rule settings will be retained until you close the document and can be quickly applied by just clicking on the border icon.

The grid with no edges highlighted (clear borders) will remove all rules applied to that cell or group of cells.

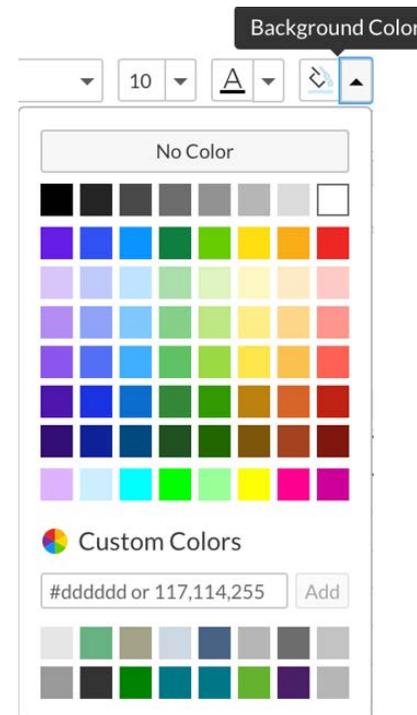


It is important to note that if you mean to only remove one rule from a cell using 'Clear borders', that you will need to replace any other rules that are removed unintentionally.

## Applying tints to a cell

Select the cell or group of cells and then go to the Background Color panel in the Edit menu, click the dropdown and pick your color or add the colors hex reference (clicking Add to apply it, if it isn't already listed)

To remove a tint completely you do the same but choose 'No Color' instead.



Your previous tint setting will be retained until you close the document and can be quickly applied by just clicking on the Background Color icon.

# Table formatting

## Formatting a table's size

More than one row or column can be selected at a time by clicking the starting row/column, holding down the shift key and clicking on the last row/column.

Just be aware, when selecting multiple rows/columns, that some may be hidden and need to stay that way.

## Adjusting column width

These can be manually adjusted, or a specific measurement can be applied.

## Adjusting manually

To manually adjust a column or group of columns, choose your selection and hover over one of the column edges at the top of the table and an arrow icon will appear, which you can drag to increase/decrease the size.

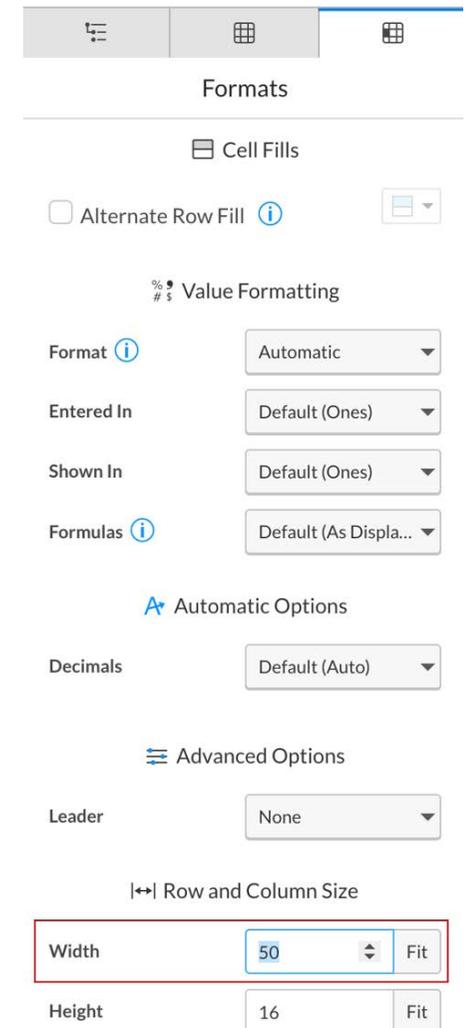


A table's size can be increased to sit over more than one column on a page. Tables are also built to automatically snap to the current column width, if it is smaller than the table's width, when adjusted. To avoid this make the paragraph, where the table is, to one column. Next adjust your table's columns and then change the paragraph back to the desired column layout.

## Adjusting precisely

To set a specific measurement to a column or group of columns, choose your selection and in the Formats panel you can enter a precise number for the width, which will be applied to the selected columns. This is the best option for column width consistency.

The number is in Pixels and if you are matching a layout from InDesign then you can view your InDesign file in Points or Pixels to see what the equivalent measurement needs to be on the platform.



**Formats**

Cell Fills

Alternate Row Fill ⓘ 

Value Formatting

Format ⓘ Automatic ▼

Entered In Default (Ones) ▼

Shown In Default (Ones) ▼

Formulas ⓘ Default (As Displa... ▼

Automatic Options

Decimals Default (Auto) ▼

Advanced Options

Leader None ▼

Row and Column Size

Width 50 Fit

Height 16 Fit

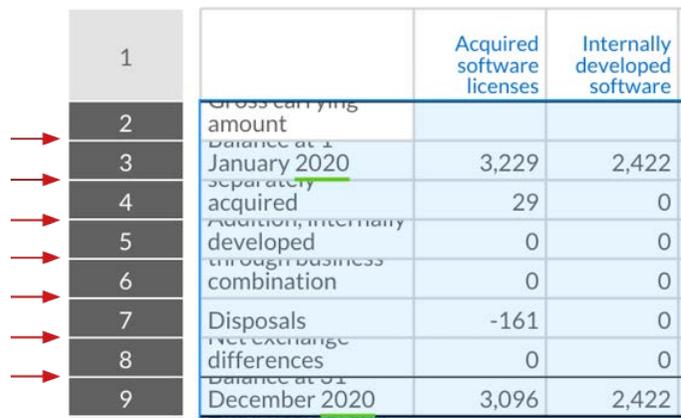
# Table formatting

## Adjusting row height

These can be manually adjusted or a specific measurement can be applied.

## Adjusting manually

To manually adjust a row or group of rows, choose your selection and hover over one of the row edges until an arrow icon appears. Then, drag to increase/decrease the size. If double-clicked, the row height will automatically adjust to display any obscured text.



1		Acquired software licenses	Internally developed software
2	Gross carrying amount		
3	Balance at 1 January 2020	3,229	2,422
4	Separately acquired	29	0
5	Addition, internally developed	0	0
6	through business combination	0	0
7	Disposals	-161	0
8	Net exchange differences	0	0
9	Balance at 31 December 2020	3,096	2,422



1		Acquired software licenses	Internally developed software
2	Gross carrying amount		
3	Balance at 1 January 2020	3,229	2,422
4	Addition, separately acquired	29	0
5	Addition, internally developed	0	0
6	Acquisition through business combination	0	0
7	Disposals	-161	0
8	Net exchange differences	0	0
9	Balance at 31 December 2020	3,096	2,422

# Table formatting

## Adjusting precisely

To set a specific measurement to a row or group of rows, choose your selection and in the Formats panel you can enter a precise number for the height, which will be applied to the selected rows.

For financial tables it may be better to stick with manually adjusting them automatically (as described previously) as this avoids text being left obscured in a fixed height row.

There is also the option to turn on **'Resize rows to fit cell contents'** in the Table Properties menu for a selected table. This can also be checked at the Document Level, but be aware that it would also affect purposely cropped tables, used for layout purposes.



**More information on creating tables here at Workiva Support**



**More information on styling tables here at Workiva Support**

**Formats**

Cell Fills

Alternate Row Fill ⓘ

Value Formatting

Format ⓘ Text

Text Options

Text is displayed exactly as entered.

Advanced Options

Leader None

Row and Column Size

Width 50 Fit

Height 14 Fit

**Table Properties**

Title

Title Row

Title Suffix

Headers

Header Rows 0

Table Breaking

Never break if smaller than a page

Always break across pages

Only break when table exceeds

25 % of the page height

Advanced Options

Resize rows to fit cell contents ⓘ

# Color management

For XHTML, only RGB colors can be used, as this is the only color format supported on the web. If InDesign is being used to add additional content then InDesign needs to be set to RGB (Red, Blue, Green).

Hex is another way of describing RGB color in base 8 (hexadecimal). Pantone colors (spot) are used in printing. The ink used is the actual color specified instead of being made up of CMYK colors. They are often specified in branding guidelines for a corporate color because of their accuracy. It is advisable to always check branding guidelines for specific colors.



**All colors need to be in RGB for web/ESEF use**

Remember screen limitations when choosing colors for the web.

Make sure you have enough color contrast for good readability for all users. Please check local jurisdictional regulations for any guidance here. Color contrast can be a part of audit.

## Using the color palette

The platform color palette has 64 standard colors but beneath this is a custom color area which allows for up to 16 custom colors to be stored and displayed at any one time.

The custom color area is where additional document specific colors can be added.

The color palette is linked to a user's own account. If additional users need the same custom colors, these need to be uploaded into their custom palette separately.

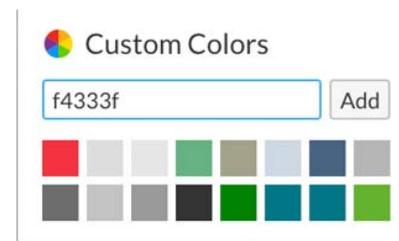
The same color palette will be displayed for any platform function that requires a color choice.



**Premium feature available**

## Adding custom colors

To add a custom color to your palette, open any color palette from the main menu (i.e. Text Color, Highlight, Background Color, etc) and in the Custom Colors box add your Hex reference or RGB numbers for your desired color and then click add.



This will add the color to the top left custom color box and move all the existing colors along one. If there are already 16 colors then the last color will drop off the end of the list.



**More information about the use of custom colors at Workiva support**

If you do not have a hex reference for your color please make sure you consult your branding guidelines or ask others in your team. It is not a good idea to just estimate the hex color by scraping screenshots into Photoshop.

# Fonts

It is important, before the start of your project, to check that the fonts, together with all the font weight variations, are available on the Workiva platform in your workspace.

Fonts need to be loaded into your workspace to be available. We have a list of already supported fonts. Please note that additional licensing may still be required.

## Adding fonts to the platform

If specific fonts based on brand or design requirements are required on the platform then the fonts and the necessary weights need to be supplied to the Workiva font team. This can be done through the client's CSM.

The font team will check compatibility and licensing requirements before upload. This process can take up to 6 weeks.

We only use the TTF version of fonts on the platform. If customers provide us with OTFs, Workiva will convert them or request TTF versions.

Installation of fonts can take up to 6 weeks, so if necessary, make this a priority. [Supported font list here](#).

## Licensing

For publishing in XHTML, companies need to own the web usage rights of any font weight being used in their iXBRL/XHTML file.



**Jurisdiction consideration - test fonts if using online**

Presently, an iXBRL filing constitutes web usage. It is recommended that companies check the licensing status of all fonts they are using. Also, issuers cannot rely on suppliers to do this for them or indeed hold such a licence on behalf of the issuer. In addition, licensing is based on a per font 'weight' basis, so if you are only using two weights of a font family, you only need to comply for those weights.

If the font is available in the Workiva platform, then the font is open source or has the appropriate license in place.

## Open source fonts

Google fonts and other 'free to use' fonts may be worth considering not only for cost reasons but because they are especially tailored for the web.

## Testing font rendering in browsers

It is important that designers test font rendering in browsers to avoid unexpected effects. It is critical that font choices are made with such knowledge. Also, some italic font weights and some older sans serif fonts are prone to not looking very good when rendered in browsers. We recommend testing fonts early.

## Fonts not in the Workiva platform

Please ensure that fonts used in any vector imagery uploaded into your documents have their fonts embedded or outlined. If the fonts are available in the Workiva platform, this step is not necessary.

## Custom fonts

These include fonts constructed for licensing reasons or decorative usage within text. Please test thoroughly that you are confident that the font construction is suitable for the Workiva platform.

## Renaming of fonts

Please be aware that renaming fonts can render them inoperable or cause them not to appear.

## Link to list of fonts on platform

[\[Click here\]](#) for an up to date list of supported fonts.



**Jurisdiction consideration - Google fonts are specially tailored for the web**

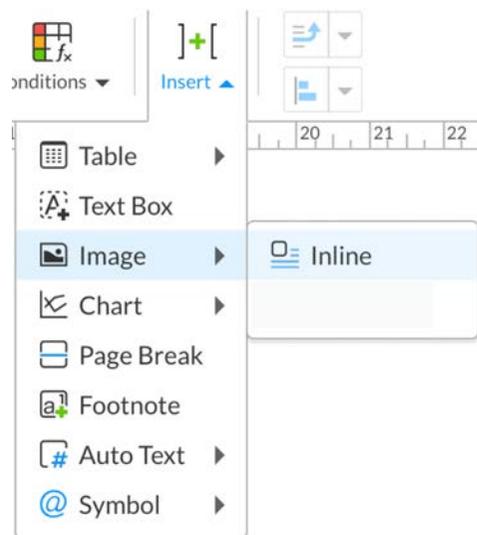
It is important not to rename fonts!

# Image management

## Placing an image

To place an image, follow these steps:

1. Place the cursor where you wish the image to appear (this can be in an empty paragraph, within existing text, in a table cell or within the Header and/or Footer).
2. In the main File menu go to the Insert drop-down and choose Image/Inline.



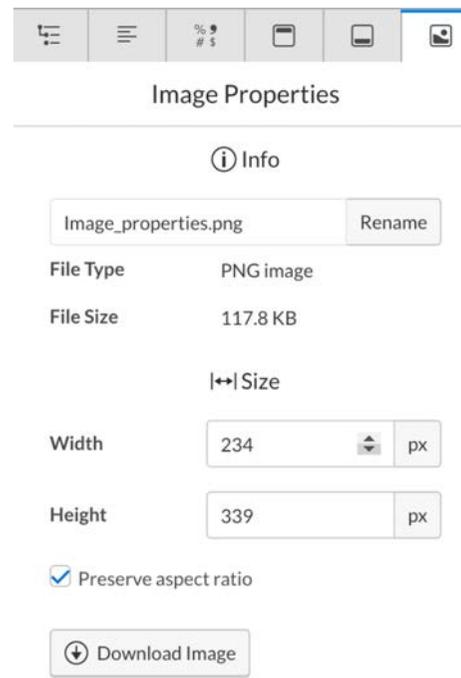
**Premium feature available - Floating images**

## Sizing and proportion

An imported image will size proportionally to fill the column it has being inserted into.

To amend the image size after insertion you must do the following:

1. Select the image.
2. Open the Image Properties panel.
3. If you need to keep sizing proportionally then make sure 'Preserve aspect ratio' is ticked.
4. You can now adjust the Width and/or Height until you get the desired size.
5. Hovering over the Width or Height will display 2 arrows. Clicking on these and holding the mouse button down will quickly size an image up or down.



For accuracy, it is recommended to use the arrows to resize.

There are controls on the platform to manage image quality and size upon export. This means you can maintain a hi-res workflow within your Workiva document and color correct images after export.

Web formats (JPG, GIF and PNG) are the only formats supported on the platform.



**Managing assets - charts, images and info-graphics**

# Image management

## Resolution

An imported image will appear with the same resolution as it was created with - we do not alter the resolution of an image during upload.

Resolution can be altered for Export, in either the Document properties (which will apply to all outputs) or on an individual export basis in the [Export](#) Advanced menu during export itself.

If no setting is applied, then all images will export with the same resolution as they were imported.

## Color mode RGB vs CMYK

The only time a CMYK image would be required, is for printing a document professionally. More information around color correction for images can be found in the [Printing from Workiva](#) section.

## Offline management

Workiva does not have an image Library. Additionally, repeated images are not linked to one another on the platform. All master image copies must be managed locally by the editor/designer.

## Updating an image

Images cannot currently be updated on the platform. If an image is amended, outside the platform, then it will require re-inserting.

Image size and position will need to be set the same as the existing version.

## Be careful of JPGs

JPGs (JPEG) can present certain issues as they can be saved/used in CMYK and RGB. Also, older versions of Adobe Photoshop software and other image editing programs present differences in 'saving' and 'exporting' to the jpg format.

## A note on spreads

Large images used across a spread (two pages) need to be separated/split into single pages for use on the platform. See [Using a Background image](#) for more info.

When using Background images to create a spread on the platform, each side of the image will need to be in a separate section.

# Printing from Workiva

## Core Essentials

The platform is web based and is therefore an RGB environment. Here is what you need to consider if you are going to professionally print your report.

### Output options

Both an RGB or CMYK PDF are exportable from the platform.

Please see [Exports](#) for more information on these options.

#### RGB PDF

An exported RGB PDF will need color correcting for Print but is probably the best version for preparing for Print and has the most flexibility.

#### CMYK PDF

An exported CMYK PDF is a straight conversion of the colors to CMYK but may not match your brand guideline requirements and converted images may not match the color conversion settings/saturation required for Print.

### Color correction

It is highly recommended that you speak to your Printer on how best to deal with color correction, as they will have the best insights on what your options are.

### General image formats

#### Web formats

JPG, GIF, PNG (bitmaps) and SVG (resolution-less) are common web formats for images. Bitmap formats are often set at 72 or 96 dpi and are RGB.

#### Print images

PSD and TIFF are common image formats for print often set at 300dpi (dots per square inch) and always CMYK. Resolution-less graphics such as graphs are used in Illustrator (AI) and EPS (Encapsulated Postscript) formats.

Talk to your printer early

### Image conversion

Your printers may be able to advise on the best way to convert your images from RGB to CMYK.

If you plan to just convert the images once exported, place Hi-Res versions of the images in your document.

Another option is to replace the images with Hi-res CMYK versions in the exported PDF. This can be done using tools, such as Adobe Acrobat or Enfocus Pitstop.

### Considerations

A PDF exported from the platform will not contain the following:

- Bleed (bleed is ink that prints beyond the trim edge of the page to ensure it extends to the edge of the page after trimming)
- Printers crop marks (lines printed in the corners of your document to show the printer where to trim the paper).

#### Web (Workiva)

.png (rgb, 72dpi or 96dpi)

.jpg (rgb, 72dpi or 96dpi)

.svg

#### Print

.psd (cmyk, 300dpi)

.tiff (cmyk, 300dpi)

.jpg (cmyk, 300dpi)

.ai

.eps

# Charts

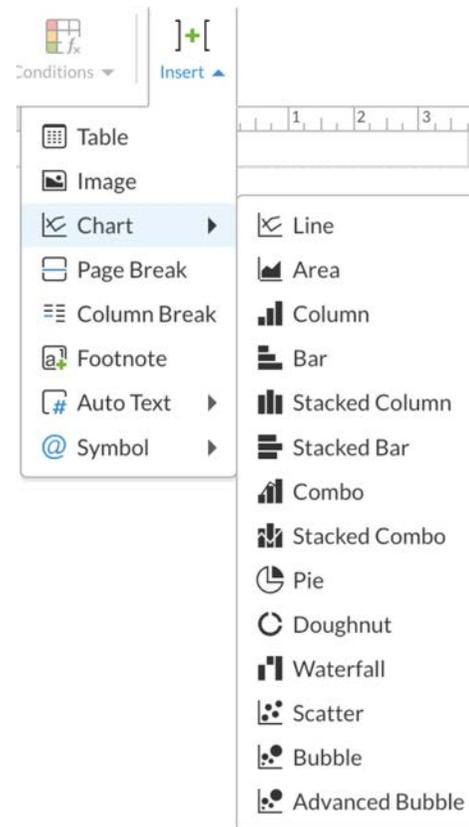
Workiva charts are based on spreadsheet data and that data can be standalone or linked. Change a number at source and charts will automatically update throughout your report or presentation.

The charting tool does not have all the capabilities of Adobe products but with clever use of tables, images and layout a lot of variation can be achieved. See more in [\[Getting Creative with Charts\]](#).

## Inserting a chart

A chart can only be inserted inline, so it will appear wherever your cursor is placed within the content. Generally, this would be in a new empty paragraph. Charts cannot be placed in the Header or Footer.

To insert a chart, place your cursor where you wish the chart to appear and navigate through the Edit menu to Insert/Chart and choose a chart type from the drop-down list.



When you insert a chart, it will have default colors, fonts (Arial) and default dimensions, which are 613 pixels wide by 380 pixels tall, regardless of the size or orientation of your page.



**Managing assets - charts, images and info-graphics**

# Charts

## Knowing your chart defaults

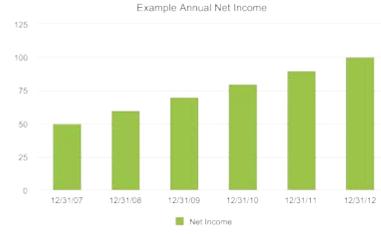
Here are all the default charts.

You can change most of the default settings to create the chart look you require and that is done through the Chart properties panel.

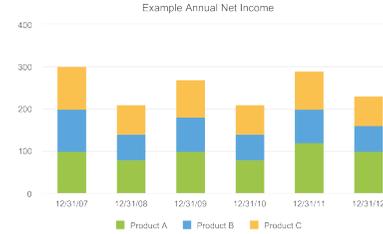
### Line



### Column



### Stacked Column



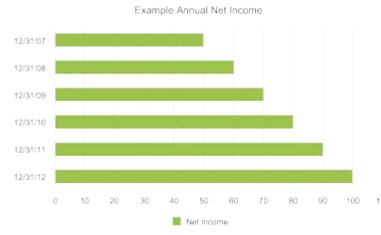
### Combo



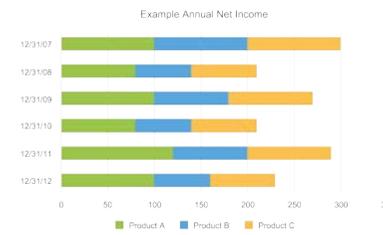
### Area



### Bar



### Stacked Bar



### Stacked Combo



# Charts

## Pie

Example Total Return Performance



■ Base Salary ■ Short Term Incentives ■ Long Term Incentives

## Doughnut

Example Total Return Performance



■ Base Salary ■ Short Term Incentives ■ Long Term Incentives

## Waterfall

Example YTD Revenue Change



## Scatter

Example Total Return Performance



## Bubble

Example Total Return Performance



## Advanced Bubble

Example Total Return Performance



## The Chart Properties panel

The Chart Properties panel becomes available when the chart is clicked on. There are a lot of options in here and they can differ based on the chart choice.

### Chart properties General

General options, like adding a title and setting the size, can be found here.

### Series/Slices/Plot

Here you can affect various settings around the data used in the chart, for example applying a color, data labels, etc.

☰
📊
👤 # 5

### Chart Properties

▼ **General**

**Title** 👤

Example Annual Net Income

**Stack Bars** 🔘

**Orientation** 📊 📈

**Width**  px

**Height**  px

**Spacing** Set Spacing Options

**Plot Area Fill** Solid ▾

**Fill** ✕

▼ **Series**

All Series ▾

**Type** 📊 Column ▾

**Show Labels** 🔘

**Bar Group Padding**  %

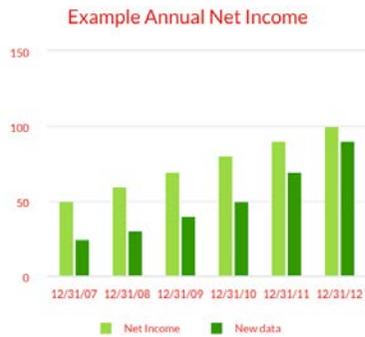
**Bar Padding**  %





# Charts

Changes made here will be reflected in your chart.



- White space between the edge of the chart boundary and the chart elements can be tweaked via the Spacing option.

Spacing Set Spacing Options

The default is 15 all around.

**Set Spacing Options** ✕

Make all sides equal

Left	<input type="text" value="15"/> px	Right	<input type="text" value="15"/> px
Top	<input type="text" value="15"/> px	Bottom	<input type="text" value="15"/> px

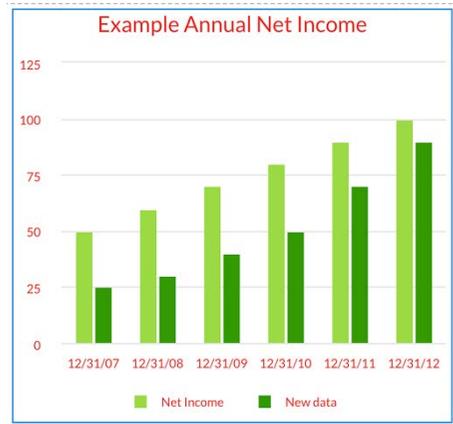
Here the spacing has been set all round to 5.

**Set Spacing Options** ✕

Make all sides equal

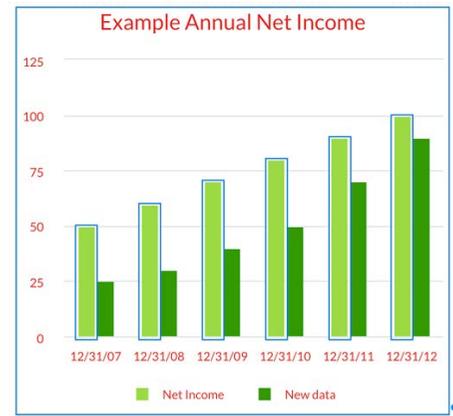
Left	<input type="text" value="5"/> px	Right	<input type="text" value="5"/> px
Top	<input type="text" value="5"/> px	Bottom	<input type="text" value="5"/> px

The result of this spacing is that the text is now closer to the boundary area.



There may be times when you wish to make the spacing zero but do check that text does not start to crop off in your export formats.

- The bars are controlled by the Series. Either select the Series themselves, through the Chart Properties panel, or by clicking on a bar in the chart.



With the Series selected, amends can be made within the Properties panel.

Series

Net Income

All

Type: Column

Axis: Left

Color: ■

Show Labels:

Border:

Dash Style: Solid

Show In Legend:

To move between different series in the panel, click on the Series name. Individual bars can also be selected through the second dropdown menu.

# Charts

In this example, the color red has been picked, the show data labels selected and the legend switched off.

Series

Net Income

All

Type: Column

Axis: Right

Color: ■

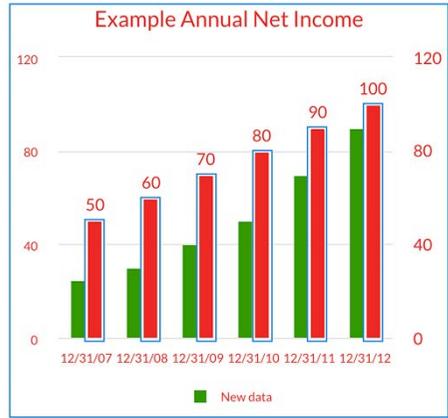
Show Labels:

Placement: Outside End

Border:

Dash Style: Solid

Show In Legend:



Any additional text displayed by switching on a setting may need adjusting to match your text style

Try every setting of charts early to find out what can be achieved

7. To amend or hide the title, go to the General Properties panel.

Chart Properties

General

Title:

Net income 2022

8. To amend an axis, click on the axis or find it in the Chart Properties panel. Below the title, the min/max value and step size has been added.

Chart Properties

Right Axis

Title:

Axis Title: Axis Title

Min Value: 20

Max Value: 120

Step Size: 20

Show Labels:

Rotation: 0

Show Ticks:

Show Grid:

Show Line:

Show Zero Line:

Reverse Scale:

Inheriting Table Formatting:  Override

Column Break

# Charts

## Additional tips

### Footnotes/chemical symbols in charts

Footnote reference numbers and chemical subscripts can be added to data labels, axis labels and chart titles but only manually (not automated footnotes). Superscript/subscript has to be done with Unicode references.

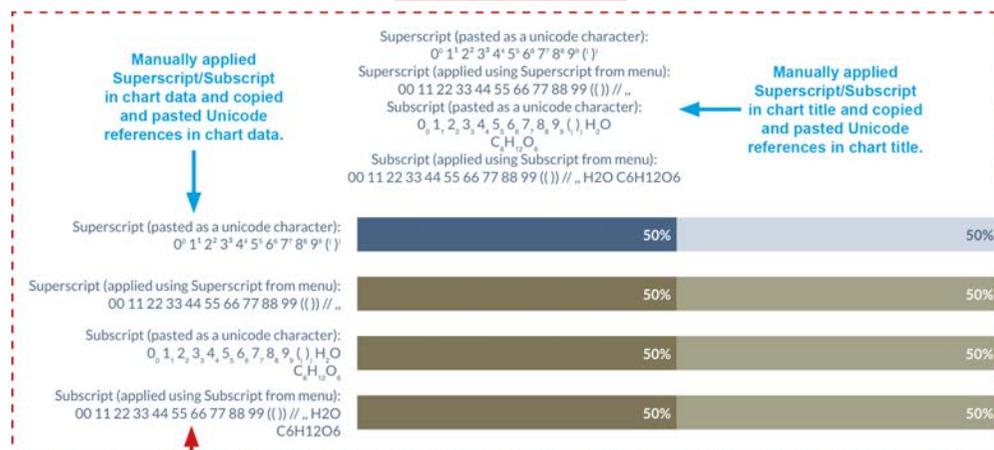
Various websites list the Unicode references for 0–9 and ( ) and allow the user to copy and paste it into a chart (whether that is into the title or the data sheet).

The diagram here shows how Superscript/Subscript and copied Unicode versions of both appear in a chart, data sheet and in Normal text.



More information about the use of charts at Workiva support

#### How text views in a Chart



#### How text views in Chart data

	A	B	C	D	E
1		Superscript (past as a unicode character): 0 <sup>0</sup> 1 <sup>1</sup> 2 <sup>2</sup> 3 <sup>3</sup> 4 <sup>4</sup> 5 <sup>5</sup> 6 <sup>6</sup> 7 <sup>7</sup> 8 <sup>8</sup> 9 <sup>9</sup> ( )	Superscript (applied using Superscript from menu): 00 11 22 33 44 55 66 77 88 99 ( ) // „	Subscript (past as a unicode character): 0 <sub>0</sub> 1 <sub>1</sub> 2 <sub>2</sub> 3 <sub>3</sub> 4 <sub>4</sub> 5 <sub>5</sub> 6 <sub>6</sub> 7 <sub>7</sub> 8 <sub>8</sub> 9 <sub>9</sub> ( ) H <sub>2</sub> O C <sub>6</sub> H <sub>12</sub> O <sub>6</sub>	Subscript (applied using Subscript from menu): 00 11 22 33 44 55 66 77 88 99 ( ) // „ H2O C6H12O6
2	Direct employees	50%	50%	50%	50%
3	Indirect employees	50%	50%	50%	50%

#### How text views outside of a chart

Manually applied Superscript/Subscript in text and copied and pasted Unicode references in text.

Superscript (past as a unicode character):  
0<sup>0</sup> 1<sup>1</sup> 2<sup>2</sup> 3<sup>3</sup> 4<sup>4</sup> 5<sup>5</sup> 6<sup>6</sup> 7<sup>7</sup> 8<sup>8</sup> 9<sup>9</sup> ( )

Superscript (applied using Superscript from menu):  
00 11 22 33 44 55 66 77 88 99 ( ) // „

Subscript (past as a unicode character):  
0<sub>0</sub> 1<sub>1</sub> 2<sub>2</sub> 3<sub>3</sub> 4<sub>4</sub> 5<sub>5</sub> 6<sub>6</sub> 7<sub>7</sub> 8<sub>8</sub> 9<sub>9</sub> ( ) H<sub>2</sub>O C<sub>6</sub>H<sub>12</sub>O<sub>6</sub>

Subscript (applied using Subscript from menu):  
00 11 22 33 44 55 66 77 88 99 ( ) // „ H2O C6H12O6

# Hyperlinks and bookmarks

Hyperlinks and bookmarks are an essential tool in any large report. On the platform hyperlinks can be targeted towards bookmarks, pages or external resources to allow navigation.

## Link types

### Hyperlinks

Hyperlinks allow you to link to resources outside Workiva, navigate to different sections or bookmarks within a document.

Hyperlinks are great when building a navigation bar within your document.

### Bookmarks

Bookmarks allow you to mark a location and easily navigate to it within your document via a hyperlink.

## Applying styles to links

### Hyperlinks

Applying a hyperlink will, by default, make the text blue and add an underline.

Currently, the default settings in cannot be changed but you can change the look of the hyperlinks manually via the ribbon.

To remove the automatically applied underline and blue color, the underlying text style will need to be unlocked.



Highlight the hyperlink text and manually change the color to the desired color and turn off the Underline (this may require clicking the underline button twice).



### Bookmarks

Applying a bookmark will not change the look of the text.

If you wish your bookmarks to stand out, create a text style and apply it consistently.

If you need to see where a bookmark has been placed, click on the bookmark in the Bookmark panel. It will take you straight to the bookmark and the text it is linked to will be highlighted.



## Export

Hyperlinks and bookmarks will work in both PDF and XHTML exports.

The bookmarks list in a PDF is based upon the section structure of your Wdesk document and therefore platform bookmarks will not appear in the list even though they will work as clickable links.



**More information about the use of hyperlinks at Workiva support**

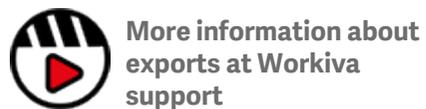


**More information about the use of bookmarks at Workiva support**

# Exports

Exports are dependent upon the Workiva solution you are accessing. There may be different export options visible.

All export formats are accessed from the File menu, under the 'Save as' dropdown.



Here are the main export formats.

## XHTML (Web, ESEF and tagged)

XHTML can be generated for 3 different purposes.

### Web

A Workiva document can be exported directly to XHTML using the XHTML option in the 'Save as' dropdown.

This will open the Export options window. From there you can choose to export either the whole or parts of the document and under the advanced tab you can make some further adjustments to that output.

### Disable External Hyperlinks

This option will disable any hyperlink that directs the reader to a destination outside the document.

### Editable XHTML

Editable XHTML allows for editing of the resulting code to integrate better with websites and is the basis of the WebAPI. Selecting this option will result in a more compliant version of XHTML generated in XBRL generations.

## Export Options

Select the options you want to include in the exported document.

- Entire Document
- Current Section
- Select Sections...
- Disable External Hyperlinks ⓘ
    - Include Headers and Footers
    - Reduce Image Resolution (PPI) to:
  - Editable XHTML ⓘ
    - Include IDs ⓘ

Cancel Export



**Jurisdiction consideration - see below**

### ESEF

XHTML for an ESEF filing can be exported through the 'Save as' menu but no tags will be included in the export. This is different to the Editable XHTML.

### Tagged

Tagged XHTML is automatically generated when the XBRL generation process is followed and is not accessed through the 'Save as' menu.

# Exports

## PDF

When PDF is selected, the PDF Export option window will open.

You can export the whole or parts of the document and under the Advanced tab you can make further adjustments to that output.

Here are some advanced options.

### Include markup

If the Document Markup tools have been used in your document, these will be included in the PDF.

### Reduce Image Resolution (PPI) to:

From here, Image Resolution can be reduced to downscale the pixels per inch (PPI) of your images and reduce the overall file size.

## Use CMYK Colorspace

This option will convert the PDF from RGB to CMYK. It is important to remember that this is a straight conversion and may not match Brand guidelines and converted images may not match the color conversion settings/saturation required for Print.

## Tag for Web Accessibility

This includes tagging elements needed for screen readers.

## Export Options ✕

Select the options you want to include in the exported document.

- Entire Document
- Current Section
- Select Sections...
  
- ▼ Advanced
  - Include Hyperlinks
  - Include Leader Dots
  - Include Alternate Row Fill
  - Shift Sections to Top of Page ⓘ
  - Include Track Changes
  - Include Markup
  - Reduce Image Resolution (PPI) to:  
 ▼
  
- Use CMYK Colorspace
- Include Draft Watermark
- Include Comments
- Tag for Web Accessibility
- Include Attachment Labels
- Use bookmarks to create the PDF outline

Cancel **Export**

# Exports

## Word

Choosing Word as the export option will open the Word Export option window.

You can export the whole or parts of the document and under the Advanced tab, further adjustments can be made.

### Include Leader Dots

If Leader Dots have been used in the document, these will be included in Word export.

### Embed Fonts

Selecting this will embed the fonts in the Word file. This helps the Word file to display correctly on screen, when the fonts are not locally installed.

## Show Table Cell Shading

Selecting this will include any shading that has been added to a cell.

## Reduce Image Resolution (PPI) to:

From here Image Resolution can be reduced to downscale the pixels per inch (PPI) of your images and reduce the overall file size.

Workiva documents are not Word documents. 100% alignment is not guaranteed so testing is recommended

## Export Options ✕

Select the options you want to include in the exported document.

- Entire Document
- Current Section
- Select Sections...

### Advanced

- Include Leader Dots
- Embed Fonts

Show Table Cell Shading

Reduce Image Resolution (PPI) to:

300 ▾

Cancel

Export

# Health of a document

The Workiva platform has an inbuilt Document Health tool.

This can be useful for checking for a variety of issues within a Wdesk document. Outlined here are things which could be helpful during document creation and signoff.

Not all issues will need fixing. This is merely a tool to locate and address issues based on user's discretion.

## When to check document health

### Document creation

When a document has first been set up/designed, it is good practice to run a health check to look at image, content, chart and hyperlink issues.

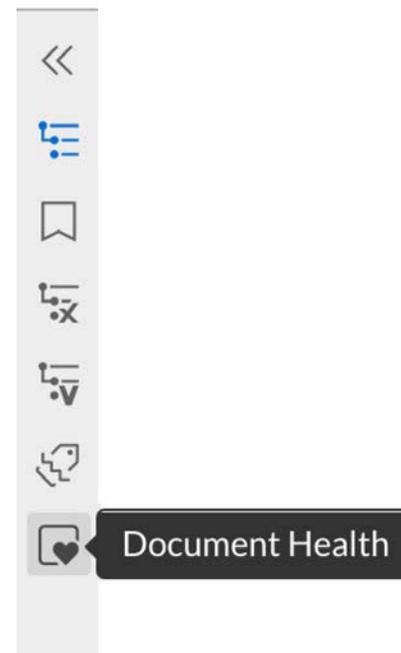
### Document Signoff

When finalising design for the final version, it can also be useful to run a final health check to look at image, content, chart and hyperlink issues.

## How to do it

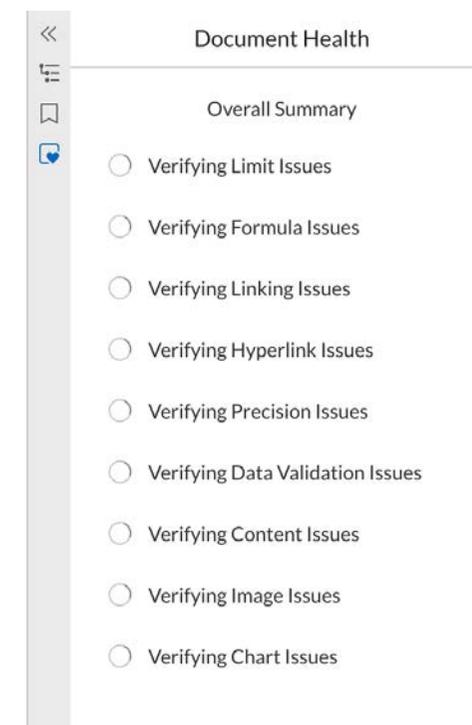
### Document Health icon

To access the Document Health panel, just look down from the Section Outline menu and locate the Document Health icon as shown below.



## Document Health panel

Clicking on the icon will automatically perform a document health check, shown below.



# Health of a document

In an ideal scenario you would see green ticks for every potential issue.

Document Health

Overall Summary

- No Limit Issues
- No Formula Issues
- No Linking Issues
- No Hyperlink Issues
- No Precision Issues
- No Data Validation Issues
- No Content Issues
- No Image Issues
- No Chart Issues

No Issues Found in Your Sections

Refresh

This is what you are more likely to see when a Document Health check is run. Not all of these checks relate to design issues.

Document Health

Overall Summary

- No Limit Issues
- Verified Formula Issues (18)
- Verified Linking Issues (21)
- Verified Hyperlink Issues (46)
- Verified Precision Issues (1)
- No Data Validation Issues
- Verified Content Issues (19)
- Verified Image Issues (48)
- Verified Chart Issues (25)

Issues Found in Your Sections (178)

Continue

Clicking the Continue button will open up the main Document Health window. A full breakdown of where the issues reside will appear.

Document Health

Filter

Categories: Chart Issues, Content Issues, Formula Issues, Hy...

Content: Content

Show only sections with issues

178 Issues Found Today, 3:09pm

Section Issues

- Header/Footer (0)
- Cover (0)
- Cover (1)
- IFC (0)
- Table of Contents (47)
- At a glance (0)
- 1. Message from the CEO (1)
  - Company Information (2)
  - Strategic Goals (1)
  - Strategic Goals Pullout (0)
- 2. Executive Team (8)
- 3. Strategy & Business (9)
- 4. Performance (6)

Show Summary

## Summary filter

The results can be filtered in the Categories' dropdown menu by switching off unwanted search results.

Categories

Chart Issues, Content Issues, Formula Issues, Hy... ▲

- Hyperlink Issues
- Chart Issues
- Content Issues
- Linking Issues
- Formula Issues
- Precision Issues
- Image Issues

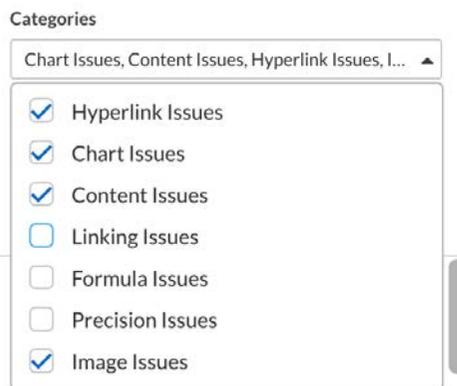
If the filter menu is not showing, it can be opened and closed by selecting the filter button.

Document Health

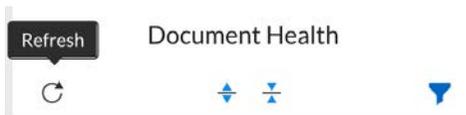
Filter button (funnel icon)

# Health of a document

For a more design related search, tick these selections from the drop down menu.



Followed by the refresh button.



## Reviewing issues

The issues displayed will now only be the ones ticked in the dropdown.

⚠ 178 Issues Found Today, 3:29pm

### Section Issues

- Header/Footer 0
- Cover 0
- Cover 1
- IFC 0
- Table of Contents 47
- At a glance 0
- ▼ 1. Message from the CEO 1
  - Company Information 2
  - Strategic Goals 1
  - Strategic Goals Pullout 0
- 2. Executive Team 8
- ▶ 3. Strategy & Business 9

You can now work through the issues by clicking on each one in turn.



Clicking on the issue will give a more detailed account of what the issue is and allow you to navigate directly to the location of the issue.

In this example, an image may be oversized for the XHTML export.

< 178 Issues Found Today

- Cover 1 Issue
- ▼ Image Issues 1
  - Large image size may be considered invalid. 1

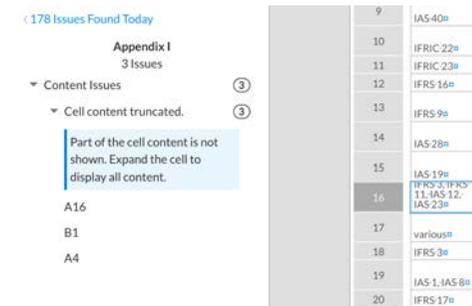
Consider replacing the image with a compressed version of 500kb or less before exporting to XHTML.

Avikro-2.0-NewC.jpg

To locate the issue, just hover over the image name and a 'Go to Issue' arrow will appear. Clicking this will load the page in the main window.



In this further example, a truncated cell has caused an alert. Clicking on A16 will load the table where the issue can be resolved.



# Health of a document

## Resolved issues

Once all the issues applicable have been addressed, refresh the Document Health panel. This will give an updated summary of the remaining issues within the document.

177 Issues Found Today

Appendix I  
2 Issues

Content Issues 2

Cell content truncated. 2

Part of the cell content is not shown. Expand the cell to display all content.

B1

A4

10	IFRIC 22 <sup>a</sup>
11	IFRIC 23 <sup>a</sup>
12	IFRS 16 <sup>a</sup>
13	IFRS 9 <sup>a</sup>
14	IAS 28 <sup>a</sup>
15	IAS 19 <sup>a</sup>
16	IFRS 3, IFRS 11, IAS 12, IAS 23 <sup>a</sup>
17	various <sup>a</sup>
18	IFRS 3 <sup>a</sup>
19	IAS 1, IAS 8 <sup>a</sup>
20	IFRS 17 <sup>a</sup>

## Limitations

The Document Health Check only checks for the issues listed in the panel. It does not check for everything. Color discrepancies, for example, will not be picked up in the health check. Designers should not rely on this feature for every check.



**More information about Document Health at Workiva support**

# Multi-channel layout

Design today should be considered for multi-channel outputs. Here are some things to consider.

## Widow management

One definition of widow management is making sure that the last line of a paragraph isn't a single letter word or number. This can look ugly and add unnecessary whitespace into the design and make the content longer than it needs to be. Designers have deployed many methods to get rid of *widows*.

### Recommendation

Our recommended method of widow management is the use of nbsp. This can be done in the platform easily and is exported into XHTML.

## The non-breaking space (&nbsp; method)

Widely regarded as the best way of controlling widows in multi-channel publishing. The break between words is filled with &nbsp; or &#160; effectively making two words one word. This is ignored by search engines and cannot be seen by human readers.

This also works in responsive layouts, as it only comes into force when a text frame width conflicts with that set of words forcing all of it onto the next line therefore preventing a widow. They are also used to keep names, place names, company names and sets of figures together.

### Quick keys - non-breaking space

PC - CTRL + Shift + Space

Mac - CMD + Shift + Space

## The soft return method

This method is now widely deprecated in multi-channel publishing because text frame widths can vary in responsive layouts. Soft returns can have unfortunate consequences in such layouts. Browser rendering

differences can also have the same effect.

## The kerning method

The previous line(s) to the widow are highlighted and the inter-character spacing (kerning) is reduced allowing the widow to move up onto that line. This can be replicated in XHTML but can have unforeseen issues in the rendering of that content.

## A note on design

As we move into a multi-channel environment and the use of &nbsp; is accepted as the only way of managing widows, designers need to think of their designs and allow a little more whitespace in their layouts to diminish fit content issues. To get the best from multi-channel publishing, think XHTML first.

## Justified text

Whilst not strictly a font issue, it is very important to note that XHTML is poor at rendering justified text in multi-column format. Please avoid if you can and use range left (called ragged right in some jurisdictions).



**Jurisdiction consideration - external hyperlinks are not allowed under the ESEF mandate**

## Lists

Custom styles for lists can now be created in the Workiva platform.

Designers may need to experiment with the kind of bullets they wish to use for bulleted lists. Wingdings, Zapf Dingbats or other kinds of font libraries can be used if there is a Unicode equivalent. These need to be tested early to make sure that they translate as expected.

If designers wish to use icons or images as bullets, they will need to edit the CSS post-production. Expertise will be required for this as it is not something Workiva can support.



**Find information on keyboard shortcuts here at Workiva Support**

# Creative layout

With more layout features being added to the platform, more highly designed layouts are now possible.

Designers may still prefer to visualise their designs in their preferred design software. In this section you will find ideas and information on how to use the platforms features to achieve your Design.

Sometimes the best starting point is to just try and re-create an existing designed layout on the platform.

## Creative layout

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# Using a background image/colour for a section

## Creative layout

Consider uploading a full-page image or apply a full-page tint to a section. This will sit behind all page content.

These are linked to a section and will repeat on every page in that section regardless of alternating headers, etc.

## Adding a background image to a section

To add a background image to the selected section, go into the Section Properties panel and click Upload Image. Then browse to the image and add it.

A background image must be full page size, otherwise the platform will resize it to fit the page.

☰
☰
☰
☰
☰
☰

Section Properties

🏠
Layout

Section Size A4 (20.99cm x 29.7... ▼)

Orientati... ☐ ☐

Columns 1

Gutter 0,4 cm

☐
Margins

Left 1 cm

Right 1 cm

Top 3 cm

Bottom 1 cm

🎨
Background i

Color 🎨

Image

📁
Upload Image

In this example, a background image has been used for a divider. It will sit behind all header, footer and page content.



Once the image is added, you will see some information, like its name and file size, have an option to bin it or to upload a different image in its place.

🎨
Background i

Color 🎨

Image 
📁
Upload Image
🗑️

Name: Background\_image.p...  
Type: PNG Size: 68.6 KB

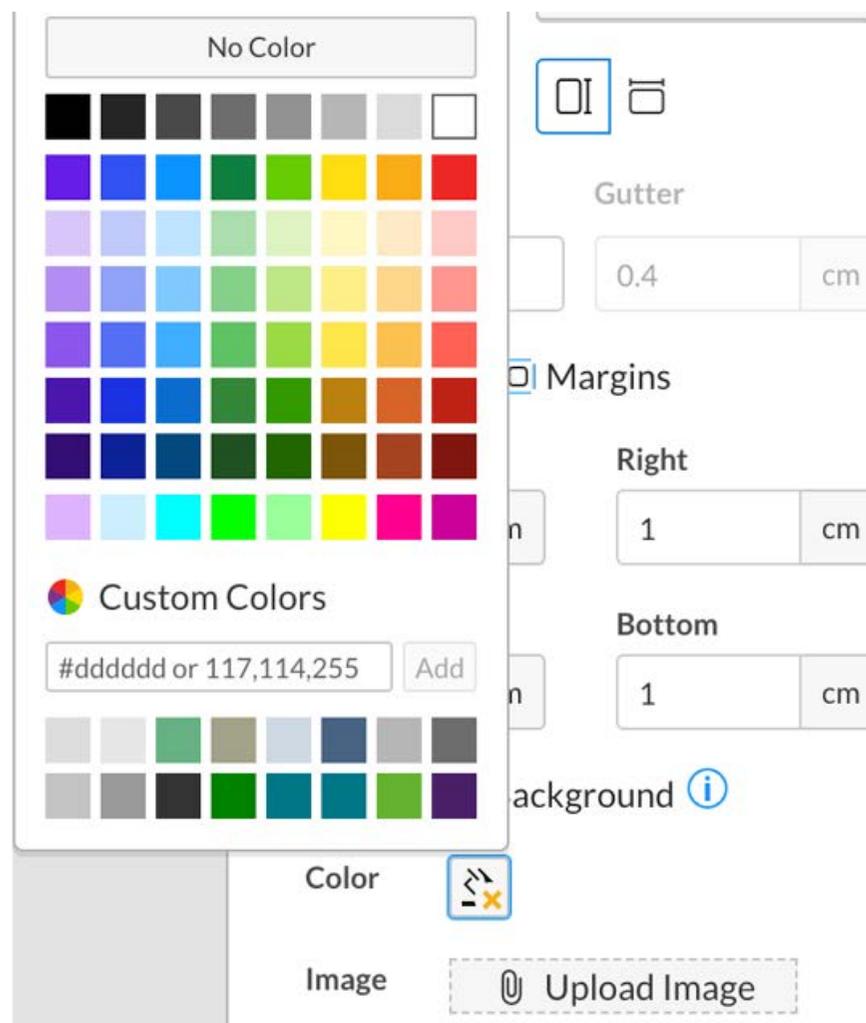
# Using a background image/colour for a section

## Creative layout

### Adding a background color to a section

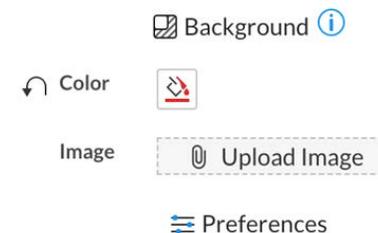
To add a background tint to the selected section go to the Section Properties panel and click Color.

The Color palette will pop up and you can either choose an existing color or add the desired color in the Custom palette.



Once the tint is added, you will see that the Color button now has a color to it and there is also an arrow to revert to default (no tint).

To change the tint again just click on the Color button and choose a different color.



# Understanding columns

## Creative layout

Adding columns to your report is flexible and can be achieved at document, section or paragraph level.

- There is a hierarchy to columns.
- Paragraph level column setting (this overrides all other column settings)
  - Section level column setting
  - Document level column setting

### 1 Changing columns at document level

Setting the number of columns at a document level will apply that setting to the whole document unless it has been overridden at another level.

Columns

Gutter

The Document setting for columns is alongside the Gutter setting in the 'Properties' menu. Properties/Document/Page formats. See [Margins and gutters](#) for more info. The Document default setting is usually one column.

Designers will probably use Paragraph level column settings the most to achieve the desired, designed layout.

### 2 Changing columns at section level

Changing the column setting at Section level will affect all content in that section, unless it has a Paragraph level override applied.

This is done through the Section Properties panel when the desired section is selected. See [Margins and gutters](#) for more info.

Section Properties

Layout

Section Size

A4 (20.99cm x 29.7cm) ▼

Orientati...



Columns

Gutter

cm

### 3 Changing columns at paragraph level

Selecting a paragraph or range of text and changing the column setting will only affect the selected text but it will override any higher-level settings.

This is done through the Paragraph Properties panel. See [Margins and gutters](#) for more info.

Paragraph Properties

Layout

Columns

Gutter

cm



An introduction to the Workiva platform for designers





# Getting creative with headers and footers

## Creative layout

Headers can be very powerful when it comes to styling a report. They allow content to be repeated on every page, left and right pages or have a unique style for a first page or last page.

Here is an example of a page where a header is used for section title, a navigation bar, folio and border. Read on to find out how this was achieved.

Our people
Introduction   The crisis of our world   Our strategy   The numbers behind the narrative   Further information
74

### Investment in our workforce around the world

The challenges presented by the fast-evolving industry landscape demand a networked organization in which cross-functional teams actively draw on resources across the organization and across the world. Our Workforce of the Future program reflects our commitment to meet the challenge of addressing our customers' unmet needs and deliver the full benefits of data-enabled connected care – by attracting, developing and retaining a workforce that will deliver the strategic capabilities we need to win.

By applying Strategic Workforce Planning, in close alignment with the strategic planning of our businesses, we identify and develop the employee capabilities needed to realize our ambitions as a health technology company. In 2020 we implemented company-wide initiatives to retain and staff our most strategic positions with top performers. At the end of 2020 we retained 93% of these employees and staffed 52% of our strategic positions with employees who are considered to be top performers. Key drivers of this are our internal development focus, leadership programs and our focused talent search services.

### Committed to listen and dedicated to learn

We have also been addressing the challenge of the expanding workforce and our ability to tap into the gig economy and other less traditional work constructs. We continue to recognize the significant contribution contingent workers make to our company. Therefore, building on earlier initiatives, we have ensured that both our workforce demand management system and our talent acquisition processes include contingent and regular employee solutions in staffing proposals and decisions. Our Total Workforce strategy considers all sources of skills and capabilities we require in the Workforce of the Future, as well as location-related talent availability and labour market trends.

We continued to devote additional attention to our campus, graduate and early-career hiring in 2020, which resulted in an increase in the number of campus hires compared to 2019. Our focus on the Workforce of the Future will continue in 2021, with further emphasis on strategic capabilities.

To be able to understand and meet customer and patient needs in a complex and continually changing environment, our workforce should reflect the society in which we operate, our customers, and the markets we serve. We believe that an inclusive culture allows our 120-plus nationalities to bring a rich diversity of capabilities, opinions and perspectives to our decision making processes, thus driving innovation, enabling faster, targeted responses to market changes, and supporting sustainable improvements in business performance.

Two years ago, we renewed our approach to Inclusion & Diversity. We set a goal of 30% gender diversity in senior leadership positions (a subset of Management and Executive positions) by the end of 2021 (compared with 19% at the end of 2018). In 2020, we again partnered with leading Inclusion & Diversity training providers to further roll out unconscious bias and inclusion trainings.

#### Breakdown of employees by employment relationship

Year	Direct employees	Indirect employees
2020	90%	10%
2019	86%	14%
2018	79%	21%

#### Breakdown of employees by age group

Year	Employees under the age of 30	Employees 30 - 50 years old	Employees over the age of 50
2020	21%	55%	24%
2019	23%	51%	26%
2018	21%	51%	28%

#### Diversity in the workplace

Gender	Percentage
Female	38%
Male	61%
Not reported	1%

## Changing the margins in a header

As noted earlier in Headers and Footers, a header's margin can be different to the section it sits in. In this example, the Left and Right margins are set to zero, as well as the space From Top.

X Position

From Top

cm

Left

cm

Right

cm

Making the margins 0 would mean, if we then left aligned any content in the Header, that it would sit in the top left corner.

# Getting creative with headers and footers

## Creative layout

### Using a table in a header

A table can be very useful in a header, for exact positioning and alignment of text.

In this example, the Header was built first in InDesign (making sure the page dimensions on both the platform and InDesign were the same) and, once happy with the look and positioning, the measurements and sizes of the designed header (in pixels) were noted. A table was then recreated in the header in the Workiva platform to reflect the same measurements.

Pixels/Points in InDesign are almost an exact match for a cell's width and height measurements on the platform

This includes using empty rows and columns to create white space where required.

You could also create a full page PNG from InDesign, including your designed header, and place that as a background image in a section and then build your Platform table header over the top, deleting the background image once done.

A page border can be added through Document properties - see [Adding a border](#) or [background color to all pages](#). Explore these options as there are some limitations.

Cells have edges and, in this example, initially there was a white gap at the edge of the page. To make the edge of the border fill to the edge of the page, a 2pt rule of the same color was applied to the outside cell edges.

	Our people	Introduction	The crisis of our world	Our strategy	The numbers behind the narrative	Further information	74	
--	------------	--------------	-------------------------	--------------	----------------------------------	---------------------	----	--

# Getting creative with headers and footers

## Creative layout

Here is the same page. This Header would only appear in the current section and any section that is set as 'Same as previous section'.

Our people
Introduction   The crisis of our world   Our strategy   **The numbers behind the narrative**   Further information
74

### Investment in our workforce around the world

The challenges presented by the fast-evolving industry landscape demand a networked organization in which cross-functional teams actively draw on resources across the organization and across the world. Our Workforce of the Future program reflects our commitment to meet the challenge of addressing our customers' unmet needs and deliver the full benefits of data-enabled connected care – by attracting, developing and retaining a workforce that will deliver the strategic capabilities we need to win.

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### Committed to listen and dedicated to learn

We have also been addressing the challenge of the expanding workforce and our ability to tap into the gig economy and other less traditional work constructs. We continue to recognize the significant contribution contingent workers make to our company. Therefore, building on earlier initiatives, we have ensured that both our workforce demand management system and our talent acquisition processes include contingent and regular employee solutions in staffing proposals and decisions. Our Total Workforce strategy considers all sources of skills and capabilities we require in the Workforce of the Future, as well as location-related talent availability and labour market trends.

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To be able to understand and meet customer and patient needs in a complex and continually changing environment, our workforce should reflect the society in which we operate, our customers, and the markets we serve. We believe that an inclusive culture allows our 120-plus nationalities to bring a rich diversity of capabilities, opinions and perspectives to our decision making processes, thus driving innovation, enabling faster, targeted responses to market changes, and supporting sustainable improvements in business performance.

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2020	21%	55%	24%
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2018	21%	51%	28%

#### Diversity in the workplace

Gender	Percentage
Female	61%
Male	38%
Not reported	1%

Once the initial header is built, it can be copied and pasted into subsequent sections and things like the Navigation bar, section title etc can be amended.

To do this, go to the destination section and un-tick the 'Same as previous section'. When this is ticked, the header displayed will be the one linked to the previous section.

☰
☰
% # \$
📄
📄

### Header Properties

**Section**  
[Creative] layout

**Starts From**  
Cover page ☰

⚙️ Settings

- Same as previous section
- Alternating pages
- Different first page
- Different last page







# Getting creative with tables

## Creative layout

### Using a table to 'cheat' content over 2 columns

In this example, the image and some supporting text needs to sit over 2 columns.

This is not possible without 'cheating' the content.

How to achieve this:

1. Add a new paragraph where the table is to start (you can always copy and paste it later if created elsewhere).
2. Set the paragraph setting to 1 column for the new paragraph.
3. Insert a table.
4. Enter the pixel widths of any border, main or gutter columns/rows. In this example it is 10px row/column around the outside (for alignment purposes it is important to recalculate any other rows/cols to compensate for the difference).

Our people Introduction ▢ The crisis of our world ▢ Our strategy ▢ The numbers behind the narrative ▢ Further information ▢ 44

---

**Investment in our workforce around the world**

The challenges presented by the fast-evolving industry landscape demand a networked organization in which cross-functional teams actively draw on resources across the organization and across the world. Our Workforce of the Future program reflects our commitment to meet the challenge of addressing our customers' unmet needs and deliver the full benefits of data-enabled connected care – by attracting, developing, and retaining a workforce that will deliver the strategic capabilities we need to win.

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----- Column Break -----



----- Column Break -----

**Employee engagement index (%)**

Our rail operations recorded a second consecutive year of strong improvement reflecting the focus we have on colleague involvement, personal development and performance management. Whilst a similar approach is adopted in our bus operation, our score dipped slightly reflecting a time lag between action being taken and colleague feedback. To address this, the timing of the next survey will be delayed.

We continued to devote additional attention to our campus, graduate and early-career hiring in 2020, which resulted in an increase in the number of campus hires compared to 2019. Our focus on the Workforce of the Future will continue in 2021, with further emphasis on strategic capabilities.

To be able to understand and meet customer and patient needs in a complex and continually changing environment, our workforce should reflect the society in which we operate, our customers, and the markets we serve. We believe that an inclusive culture allows our 120-plus nationalities to bring a rich diversity of capabilities, opinions and perspectives to our decision-making processes, thus driving innovation, enabling faster, targeted responses to market changes, and supporting sustainable improvements in business performance.

Two years ago, we renewed our approach to Inclusion & Diversity. We set a goal of 30% gender diversity in senior leadership positions (a subset of Management and Executive positions) by the end of 2021 (compared with 19% at the end of 2018). In 2020, we again partnered with leading Inclusion & Diversity training providers to further roll out unconscious bias and inclusion trainings.

With regard to appointment and promotion opportunities, we transparently share open positions and endeavour to attract candidates from a diverse range of backgrounds. Diverse interview panels are put in place for recruitment to leadership positions. In 2020, we increased the number of Senior Women's Leadership Programs for the third consecutive year.

Overall gender diversity remained stable at 38% in 2020 whilst gender diversity among Executives increased from 19% to 22% female executives. Measured against our 2021 goal of 25% gender diversity in leadership positions, we increased from 21% in 2019 to 24% in 2020.

5. Add any images/text or colors to the table and align as required (centered, align top, middle, etc).
6. Now set the column width of the paragraph the table sits in to the same as the other content on the page (in this example it is 3 columns).
7. The content in the second column will appear to run behind the table and a column break would be required to stop the content short of the table and to push it into the 3rd column.
8. You will now have a 3 column page with a table spanning 2 columns and the 3rd column running to the end of the page.

9. If the content changes then the table may need to be re-adjusted to sit as expected. As the table sits in the first column, some extra returns can help to push the table further down the page if it is required.

A column cheated over more than one column will auto adjust to the minimum column width, if you attempt to resize it. To resize, change the paragraph it sits in to 1 column, make the size adjustments and then change the column width back to what it needs to be.

# Getting creative with tables

## Creative layout

### Using a table to supplement a platform chart

Combining charts and tables can allow for different looks as well.

In the following example there is:

- A single full column table with 2 rows
- A rule applied to the top row
- Text in the second row
- A chart with a tint background applied
- A table with a tint applied
- A gutter column
- Border rows and columns
- A column with the text and data inserted



To create the same, do the following.

1. Add a new paragraph where you wish the table to start (you can always copy and paste it later if created elsewhere).
2. Set the paragraph setting to 1 column for the new paragraph.
3. Insert a table.
4. Make the table 2 rows and 1 column.
5. Shrink the first row down to 3pt and add a 2pt rule to the top cell edge (see [Table formatting](#)).
6. Set the width of the table to the required width (a pre-defined style guide is useful for pre-calculating measurements)
7. Insert your chart header text into the second cell, style and align as desired (both text and cell alignment can be applied).

8. Add a new paragraph underneath the table.
9. Insert a chart, style as required and set your desired pixel width and height (this example is matched to the equivalent of 2 columns from a 3 column grid).
10. Insert a table immediately to the right of the chart.
11. Set the number of rows and columns to get the look required. In this example, 2 columns and 2 rows have been applied. The first column is for a gutter with the pre-set gutter width. The chart was set to be 2 columns wide in a 3 column grid. The first row is a spacer to make the text line up with the chart header.

# Getting creative with tables

## Creative layout

12. Adjust the table width and height to fill the necessary space. The height of row 2 was dragged down until it looked about right against the chart. For the width, it was dragged out to fill the column width. The final increments were made by hand (using the Table width arrows otherwise it would drop onto the next line).

13. Add the tint to the table fill. It may not perfectly align with the chart due to the cell edges. In this example the left cell edge was filled with a 2pt rule (of the same tint), the bottom row with a 0.25pt rule and the top edge with a 0.5pt rule. All internal table edges were filled with a 1pt rule. This filled in any potential gaps and improved the overall alignment. This may need a bit of playing with to get right.

It might be easier to make both the background tints a darker color like Black whilst you work out the exact settings required to make it fill in and line up.

14. You should now have an aligned chart and table with a tint background and a heading and rule above.

If there is too much space between the top table and the chart below then look at the paragraph style that the table sits on, as it may have space after set. The same may be true for the chart and space before. You may need a paragraph style that you use solely for work like this, where all settings are unlocked and adjustable as required.

### Countries with production & distribution facilities





# Getting creative with images

## Creative layout

Using Inline images, background images and images in tables can give the designer a lot of options with the layout.

Some of these options are already covered elsewhere in this section. Please refer to these if you want to know more:

[Adding a border or background color to all pages](#)

[Using a background image/color for a section](#)

[Getting creative with tables](#)

Additionally, there are also some example layouts that use images in different ways here:

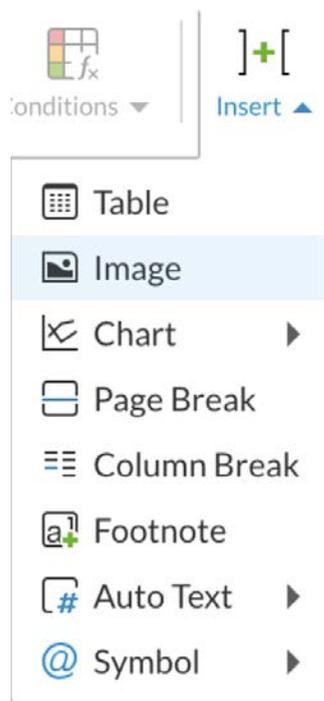
[Example column layout](#)

Let's look at the basic insertion of an image.

## How to insert an inline image

Place your cursor where you wish the image to be placed.

In the Edit/Insert dropdown choose 'Image' and navigate to the image to be inserted, select and click 'open'.



## How to resize an image

The inserted image will fit to the width of your column.

To resize, select the image and in the image properties panel, either enter an exact measurement or click and hold down on the up/down arrow to move the size up and down.

If the 'Preserve aspect ratio' is remained ticked, the image will resize proportionally (see tip below).

The 'Preserve aspect ratio' is a guide only. Click and hold on the arrow and the aspect ratio will be preserved and the image will resize quickly.







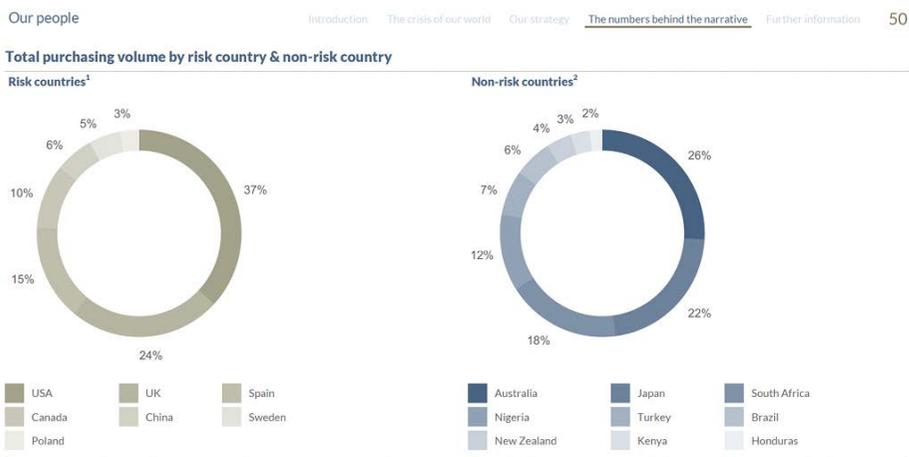
# Getting creative with charts

## Creative layout

The charting tool in Workiva is great because of its linking capability. Together with some creative thinking, a good level of design can be achieved too!

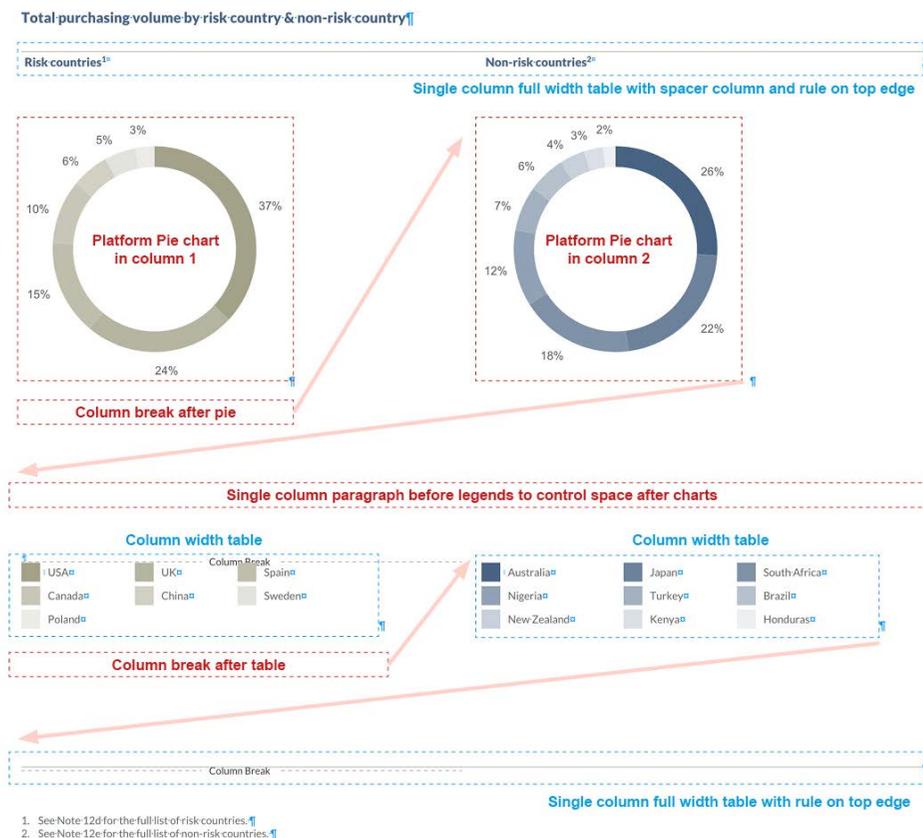
Sometimes this can require supplementing the chart with tables and images. Here are a few examples to give you some ideas.

This is a mixture of single/double columns, column breaks, tables and pie charts.



1. See Note 12d for the full list of risk countries.  
 2. See Note 12e for the full list of non-risk countries.

Here is a visual breakdown of this chart.

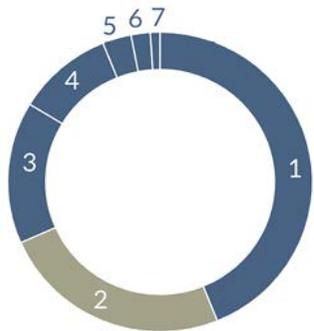


# Getting creative with charts

## Creative layout

Here is another example of a pie chart, which again uses tables to create the desired look.

Risk countries<sup>1</sup>



1	USA	43%
2	UK	24%
3	Spain	15%
4	Canada	10%
5	China	3%
6	Sweden	2%
7	Poland	1%

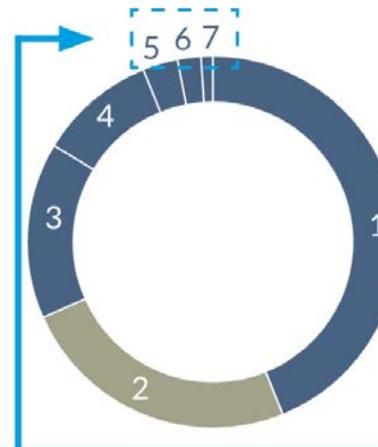
Here is the breakdown of this chart, a table above and below for the rule and title, a table to the right to display the data but made to fit within the same column as the chart and a pie chart with data labels inside the chart apart from 3 which have been manually moved outside the chart.

The data in the table, as well as the chart data, can all be linked to update automatically.

As mentioned in the diagram, in some chart types labels can be selected and moved around.

Top rule and chart title are in a table. 2 rows have been used to allow the spacing between rule and title to be adjusted.

Risk countries<sup>1</sup>



Labels in a pie can be set to various positions but can also be moved manually by clicking on a label and moving it

	1	USA	43%
	2	UK	24%
	3	Spain	15%
	4	Canada	10%
	5	China	3%
	6	Sweden	2%
	7	Poland	1%

Table sits alongside the pie chart. A spacer column has been used at the bottom and left hand sides to achieve the positioning. Data can be linked content.

Bottom rule is in a table.



# Example column layouts

## Creative layout

### Example layout (1 column)

To the right is an example of a single column layout used for a financial table. The *page title* and *navigation bar* are contained within the header. The report title and folio are contained within the footer and the main content sits in 1 column. This could just as easily be a single column page with text and imagery.

Strategic report   Governance <u>Financial statements</u> Other information			
<b>Consolidated Statement of Cash Flow</b>			
For the year ended 31 December 2020			
	2020 (€ thousand)	2019 (€ thousand)	
<b>Cash flows from operating activities:</b>			
Profit before taxes	567,353	434,169	
Amortisation and depreciation	247,717	274,757	
Provision accruals	82,418	50,873	
Result of investments	(3,066)	–	
Other non-cash (income) / expenses	(30,291)	36,230	
Net gains on disposal of property and equipment and intangible assets	(2,652)	(6,964)	
Change in trade receivables	(88,847)	15,693	4.
Change in trade payables	106,163	(45,792)	
Change in receivables from financing activities	404,568	120,902	
Change in other operating assets and liabilities	7,149	(24,698)	
Income tax paid	(252,026)	(145,017)	
<b>Total</b>	<b>1,038,486</b>	<b>710,153</b>	
<b>Cash flows used in investing activities:</b>			
Investments in property and equipment	(175,647)	(184,910)	
Investments in intangible assets	(166,340)	(171,033)	
Change in investments and other financial assets	–	377	
Cash acquired in change in scope of consolidation	–	38,751	
Proceeds from the sale of property and equipment	2,931	1,370	
Proceeds from the sale of assets and liabilities related to investment properties	–	37,130	
Proceeds from the sale of a majority stake in FFS GmbH	18,595	(278,315)	
<b>Total</b>	<b>(320,461)</b>	<b>(556,630)</b>	
<b>Cash flows used in financing activities:</b>			
Proceeds from Term Loan and Bridge Loan	–	654	
Repayment of Term Loan	(700,846)	445	
Repayment of Bridge Loan	(500)	(5,928)	
Net change in other bank borrowings	(211,832)	(498)	
Proceeds from securitisations, net of repayments	4,627	4,235	
Proceeds from bond	490,729	234	
Net change in deposits in FCA Group cash management pools and financial liabilities with FCA Group	135,094	(23,922)	
Net change in other debt	15,847	(15,314)	
Acquisition of non-controlling interest	–	(8,500)	
Increase in share capital	–	6,566	
Change in equity	1,384	(9,348)	
Cash distribution of reserves	(86,905)	34	
Dividends paid to non-controlling interest	(17,207)	(53,942)	
<b>Total</b>	<b>(369,609)</b>	<b>(105,284)</b>	
Translation exchange differences	1,229	9,546	
Total change in cash and cash equivalents	5. 348,416	57,785	
<b>Cash and cash equivalents at end of the year</b>	<b>5. 468,992</b>	<b>192,063</b>	

Strategic report   Governance <u>Financial statements</u> Other information			
<b>Consolidated Statement of Cash Flow</b>			
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# Example column layouts

## Creative layout

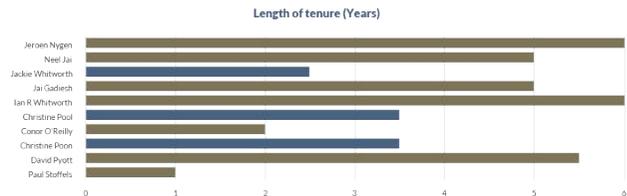
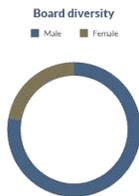
### Example layout (5 column)

Below is an example of a 5 column layout. See how the content switches between 1 and 5 columns, as well as using a combination of tables, images and charts.

#### Members of the Supervisory board

The Supervisory Board supervises the policies of the Executive Board and the general affairs of the company and its enterprise, taking into account the relevant interests of the company's stakeholders and to advise the Executive Board.

				
<p><b>Jeroen Nygen</b> 41 Chairman of the Corporate Governance and Nomination &amp; Selection Committee</p> <p><i>Jeroen has been a Member of the Supervisory Board since 2009; third term expires in 2021 Former Chief Executive and Non-executive Director of Royal Technologies.</i></p>	<p><b>Jai Gadiesh</b> 42 Member of the Supervisory</p> <p><i>Jai has been a Member of the Supervisory Board since 2014; second term expires in 2022 and member of the United States Council of Foreign Relations.</i></p>	<p><b>Neel Jai</b> 36 Member of the Supervisory</p> <p><i>Neel has been a Member of the Supervisory Board since 2012; second term expires in 2020 Head India Advisory Board, nline Inc. Former Vice President, Global Sales and Alliance - Asia Pacific &amp; Japan Enterprise, Inc</i></p>	<p><b>Ian R Whitworth</b> 49 Member of the Supervisory</p> <p><i>Ian has been a Member of the Supervisory Board since 2018; first term expires in 2022.</i></p>	<p><b>Jackie Whitworth</b> 38 Member of the Supervisory</p> <p><i>Jackie has been a Member of the Supervisory Board since 2019; first term expires in 2023, member of the Supervisory Board of Corbion N.V. Fellow of the Chartered Institute of Management Accountants.</i></p>



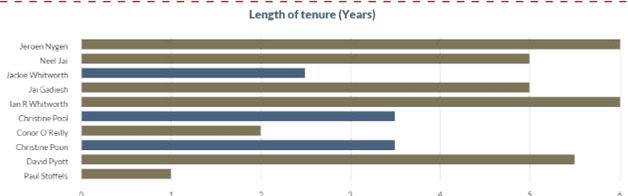
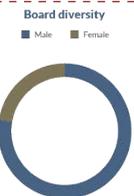
#### Members of the Supervisory board

**Single column opening paragraph**

The Supervisory Board supervises the policies of the Executive Board and the general affairs of the company and its enterprise, taking into account the relevant interests of the company's stakeholders and to advise the Executive Board.

				
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**5 separate tables, in a 5 column grid, with inserted images, rules all around and a fill.**



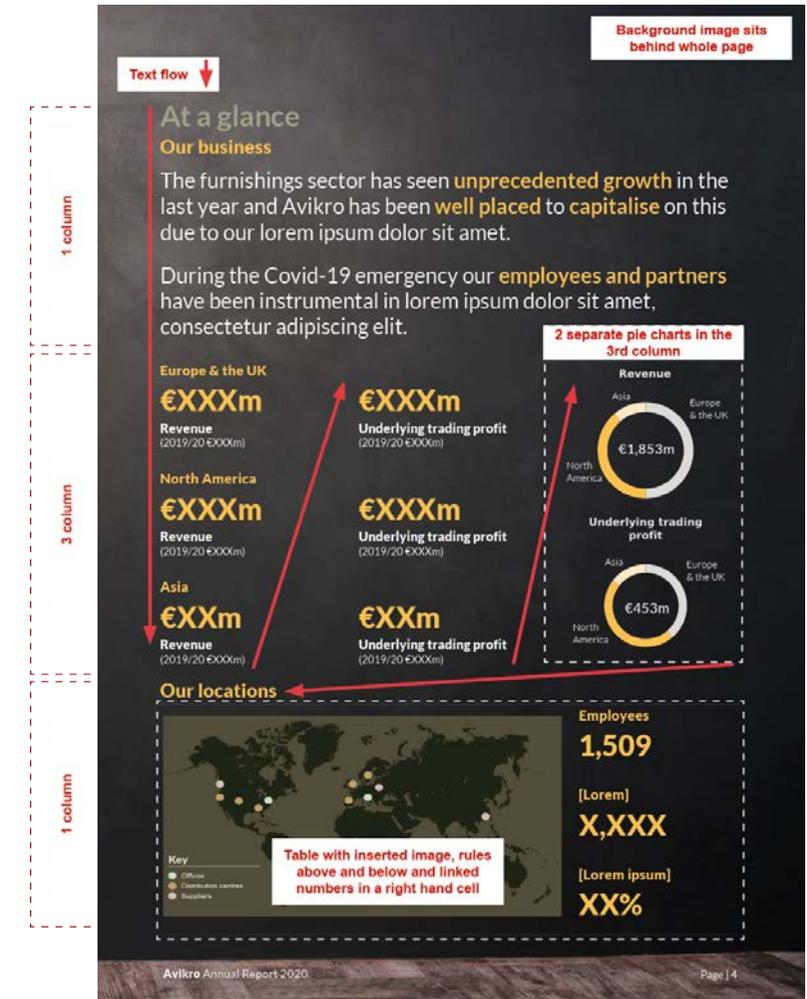
**2 styled platform charts in a single column**

# Example column layouts

## Creative layout

### Example layout (mixed column)

Here is an example of a mixed column layout used for effect in this At a glance section. See how the content switches between 1 and 3 columns, as well as using a combination of a background image, charts and a table.



# Extra Essentials

## Contents

Dual filers	77
How to build your iXBRL file in the profiler	78
How to view your document in XHTML	81
XBRL File size	83

# Dual filers

Not all filings are submitted to just one regional authority and therefore can fall under differing mandates.

This may require a report to be handled differently on the platform.

Before the setup of a report starts, discuss with both your client and CSM about what the requirements are for each jurisdiction.



**As an example of filing differences - SEC filings can only accept JPEGs, whereas ESEF filings can accept both PNGs and JPEGs**

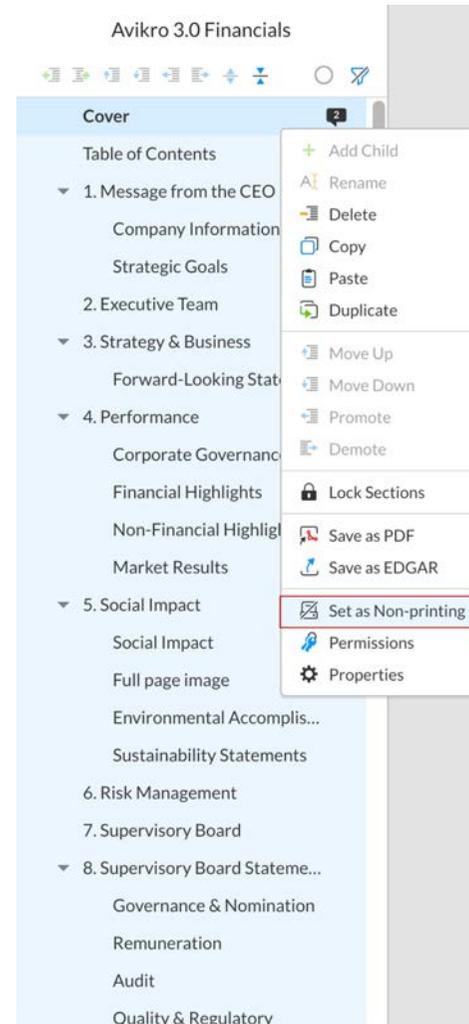
Some reporters use additional sections within their report, which they switch on and off, depending on which jurisdiction the filing is for.

If your client uses different sections for different submissions, you will need to switch off the unwanted sections for each submission before generating the iXBRL.

## Switching sections to 'Set as Non-printing'

If the main document, in our example 'Avikro 3.0 Financials', contained sections specific to different jurisdictions then the unwanted sections would need to be 'Set to Non-printing' before iXBRL was generated.

Sections set to Non-printing will be ignored during the iXBRL generation.



To switch off sections, go into the document, select all the sections you don't want to be converted to XHTML, right click and change them to 'Set as Non-printing'. Multiple sections can be selected at the same time and it is just as easy to change them back to 'Printing' again.

This doesn't need to be done every time you run a test iXBRL but just be aware that you would see all the sections if not done.

Switching the sections to 'Set as Non-printing' is only essential for the final submission but it is good practice to test it prior to the final submission.

# How to build your iXBRL file in the profiler

Only a user with XBRL enabled will be able to complete the following process.

Ask your client and their CSM if you need to have access to this feature.

To create iXBRL you will need XBRL enabled within the workspace.

## XBRL tab

When enabled, XBRL will appear as a tab in the main menu bar.



## XBRL panel

Within the XBRL tab is the below panel.

There are many options contained within this pane. Only a few are required to create the iXBRL. By default, the XBRL panel is normally inactive at the start.



Clicking the 'Show XBRL' button will make the XBRL panel active.



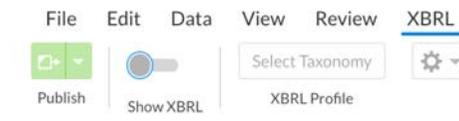
## XBRL profile

You now need to access the XBRL profile. This is done by clicking on the XBRL Profile button. In our example it has the ESEF 2020 profile already loaded.



XBRL Profile

If a profile has not already been loaded then 'Select Taxonomy' will be greyed out as below. You will need to inform your client and wait until the Profile is loaded before proceeding.



Designers are not expected to know how to load the regulatory XBRL profile.

When the XBRL Profile is loaded and the button is clicked the 'Manage Profile' window will appear.

# How to build your iXBRL file in the profiler

## Manage profile window

In the *Manage Profile* window the only tab you will need to use is *Documents*.

This will display any documents that are to be used to generate the iXBRL.

In this example below, we already have 'Avikro 3.0 Financials' as the document for the iXBRL generation. If the whole report was in this document, we wouldn't need to combine any other documents. For this example however, let's add a separate front-end document.

Manage Profile ✕

Avikro Annual Report 2019 (ESEF) (Copied 2022-02-08T09:50:42.530987Z) | ESEF 2020 Actions ▾

Info Documents Defaults Copy XBRL

Documents associated with this profile can be generated separately or combined. Drag and drop files to set document order.

Combine Documents  
 Insert Page Breaks

+ +

+ Avikro 3.0 Financials

If your filing document is all one file on the platform then you can close the Profiler and continue with '[How to view your document in XHTML](#)'. If dual filer, make sure you have read [Dual filers](#) first.

## Adding more docs

In the profile window, click on the 'Add document' button.

Manage Profile ✕

Avikro Annual Report 2019 (ESEF) (Copied 2022-02-08T09:50:42.530987Z) | ESEF 2020 Actions ▾

Info Documents Defaults Copy XBRL

Documents associated with this profile can be generated separately or combined. Drag and drop files to set document order.

Combine Documents  
 Insert Page Breaks

+ +

+ Avikro 3.0 Financials

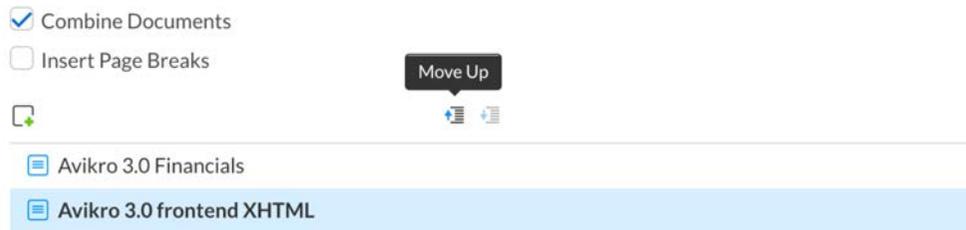
Then navigate to the document that you wish to combine with your original document (more can be added by repeating these actions) and select it to load it into the Profile panel.

	NAME	TYPE
<input type="checkbox"/> ☆ <span>☰</span>	Avikro 3.0 Financials	ESEF
<input type="checkbox"/> ☆ <span>☰</span>	Avikro 3.0 frontend XHTML	

# How to build your iXBRL file in the profiler

If you need to change the order of the documents in the Profiler, select the one you wish to move up or down and use the Move up or Move Down buttons to move it.

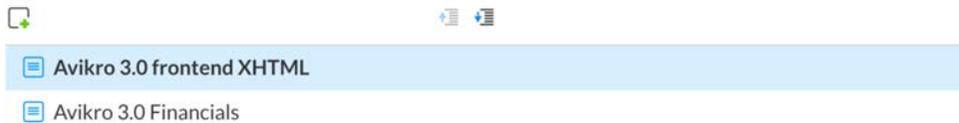
The order is from top to bottom (Front cover and sections first).



If you have multiple platform documents to combine for the iXBRL then here is where you would do that.

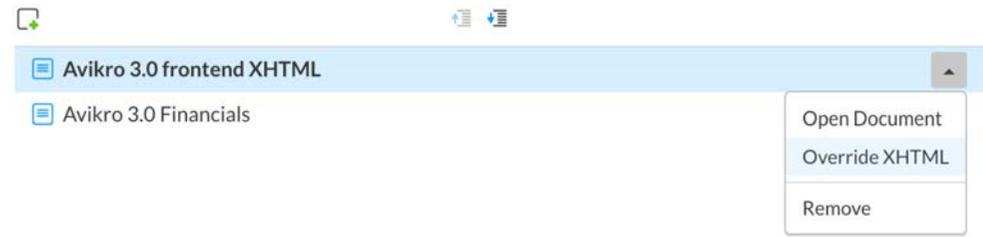
Each separate document needs to be placed in the correct position for the order of the overall document. If, for example, you had a back cover in a separate document, this would need to be added but it would stay at the bottom of the list.

In the example here, the Avikro 3.0 frontend XHTML document has been moved to the top of the list.



## Removing a doc from your list

To remove a doc from the Profile panel you just need to hover over the filename and a dropdown will display on the right-hand side.

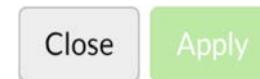


## Closing the Manage Profile window

Once you have added any additional documents to the Profiler, exit the Manage Profile window by clicking close.



**Apply is only used when setting the regional taxonomy (ESEF, SEC, etc).**



When closed, all the document settings will remain locked. If you need to change any of the settings, go back into the Manage Profile window and change as necessary.

# How to view your document in XHTML

To view a Platform document as XHTML - see [exports](#).

To view your iXBRL - it first must be generated.

You can only do this once your [XBRL profile](#) has been set up.

## XBRL Generation

To generate the iXBRL find 'Generate XBRL' on the far right of the XBRL menu.

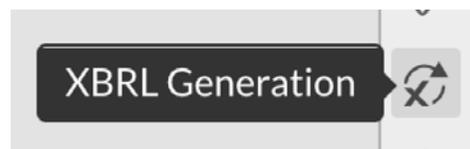
The drop-down list gives you the below options.



Use 'Full Generation' for testing purposes.

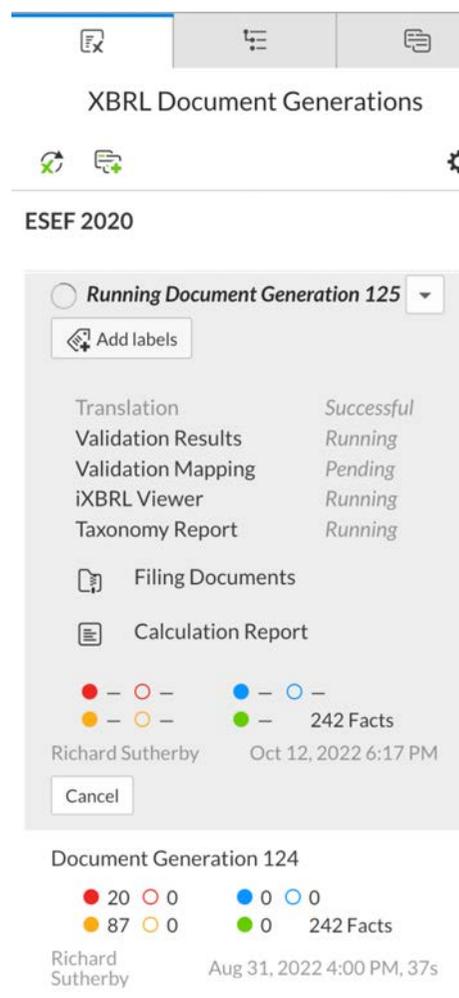
Once selected, the iXBRL will start to be generated.

To view the iXBRL Generation click on the 'XBRL Generation' icon in the right-hand panel (where you would normally look at Paragraph properties etc).

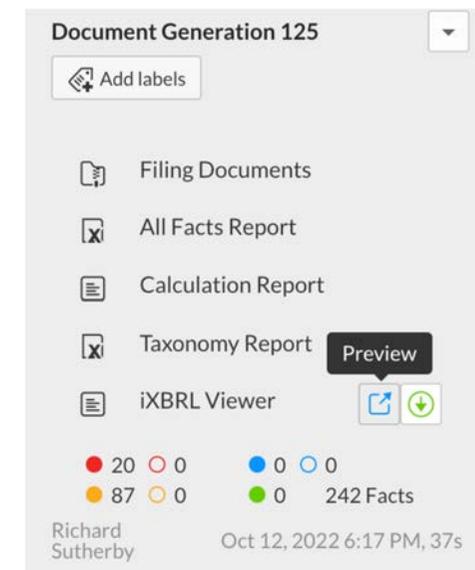


This will display any previous XBRL generations and the current one will be running or have run and sit at the top. In this example we are running Document Generation 125.

Run as many tests as required. They do not go anywhere or change any tagging etc.



Once the generation has finished running, iXBRL Viewer Preview can be selected to load the generated iXBRL into the browser window.



Ignore any Fact errors are generated. These are related to the iXBRL tagging and will be addressed by a different team.

# How to view your document in XHTML

With the XBRL loaded into the Inline Viewer, run a visual check by scrolling through the document. Note anything that looks incorrectly displayed and resolve the discrepancy.

It is a good idea to check both the front and backend regardless of whether they were generated in different ways.

Once any discrepancies have been dealt with, if required, generate a new iXBRL.

Check the [design reporting support hub](#) for help with any design issues.

## Platform only

If your document/s are platform only and your profile is set up, running a new generation will use the latest version of the document/s.

## Mixed roundtrip with Platform

If you have combined InDesign sections with Platform sections, you will need to create a new XHTML for your InDesign section/s and replace any overrides with your new XHTML and generate a new iXBRL for checking.

The screenshot displays the Workiva Inline Viewer interface. The main content area shows a document titled "Annual Report 2021" with a table of contents. The table of contents lists various sections and their corresponding page numbers:

Section	Page
Chief Executive's statement	4
Company Information	5
Strategic Goals	6
Executive Team	0
Strategy and Business	0
2020 Performance	0
Corporate Governance Statement	0
Financial Highlights	0
Nonfinancial Highlights	0
Market Results	0
Generating Profitable, Sustainable Growth	0
Environmental Accomplishments	0
Corporate Governance	0
Financial Statements and Supplementary Data	0
Report on Internal Controls	0
Report on Financial Controls	0
Consolidated Financial Statements	0
Consolidated Statement of Income	0
Consolidated Balance Sheet	0
Consolidated Statement of Cash Flows	0
Consolidated Statement of Changes in Equity	0
Notes to the Financial Statements	0

The interface also includes a sidebar on the right with the following elements:

- Highlight ?  XBRL Elements  Untagged numbers  Untagged dates
- Fact Properties ⚙
- Search icon
- Navigation arrows (< >)
- No Fact Selected (with a tag icon)
- Powered by workiva

# XBRL File size

Many regulators are now stating a file size limit of 100 MB max or even lower.

## How do you stop a filing or download sizing nightmare? How can you reduce the size of your report?

Read on for tips that designers can use to optimise their file size.

The XHTML code the Workiva platform produces is clean and optimised, which helps with file size and download speed. Essentially, everything not necessary is removed. Clients are advised to check with their filing regulator as to what the filing size limit is exactly in that jurisdiction.

## For the designer on the platform

Here are things the designer can do to help reduce the final file size:

- Avoid empty paragraphs to achieve extra space in your document.
- Unless necessary, minimise overridden styles within your document.
- Make sure you crop all your images to the correct size, 100% and RGB
- Review your font embedding in SVGs, or make sure you are using common web fonts, or just outline your text.
- Review your SVGs carefully, and make sure you are using the optimal points to create a shape. We were able to reduce a world map SVG from 5mb to 200k by optimising the number of points it used in Adobe Illustrator software without creating any visual difference.
- Think carefully if all images are necessary.



Many regulators have a 100 MB max file size. Test your file early and address where necessary.

Video available see below



How to keep my XHTML file size down?

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Written and designed by the Design Centre of Excellence, Workiva

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## Support contacts

For questions, reach out to your Customer Success manager, or our Support Team.

### 24/7 Helpdesk

United Kingdom - +44 8000885141 France - +33 801840098 US - 1-877-934-8435

From Europe: 00-800-5005-0080 From the US: 1-800-706-6526

A full list of our global support telephone numbers can be located here Or email our Support Team directly via [support@workiva.com](mailto:support@workiva.com)

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