InDesign

The Widget InDesign

A designer's guide to InDesign integration with Workiva

Workiva Proprietary Information

Workiva

Contents

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 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.

Welcome

Symbols

Jurisdiction differences to be aware of

Link to videos or webinar

Link to pdf material

Premium feature available - See Widget Premium

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. You might need to download both! 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.

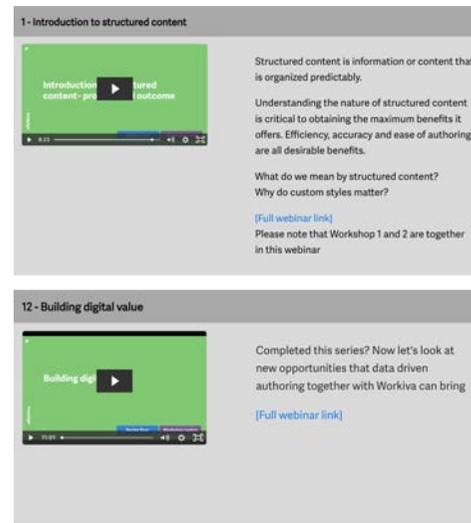## Watch a webinar!

[Quick look to how design works with Workiva]

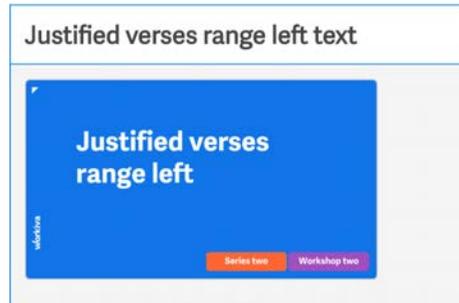[See how a client and agency works together]

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

Contents

Making the decision to use InDesign

Have a smooth journey with InDesign Integration

You are reading this because you need or want to integrate InDesign within the Workiva platform.

InDesign is the worlds leading DTP (Desktop Publishing) software and as such is a mature tool used in many industries by different types of people. Our challenge here is to identify the tool subset needed by annual and ESG reporting and the skillset needed to integrate Workiva content successfully with 100% data assurance.

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, so check that your design workflow is correct for your situation:

Options to discuss with your client

1. Here 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. Please read *The Widget - Platform* for this option.

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.

3. For some reports, higher fidelity of design may be required only on some pages. 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. Please also read *The Widget - Platform*.

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.

1 Everything done in Workiva

2 Full InDesign integration

3 Mixing the solutions

4 Splitting the solution

5 Workiva only for financials

Making the decision to use InDesign

Why use InDesign and Workiva?

Your decision to use InDesign might be one of the following:

- The design requirements are beyond the capability of the Workiva platform.

- The report is going to be professionally printed - this can be done using the Workiva platform for design but post-production software would be required.

- You want to stay designing in InDesign - this is understandable but check out all our training material on the Design Reporting Support Hub!

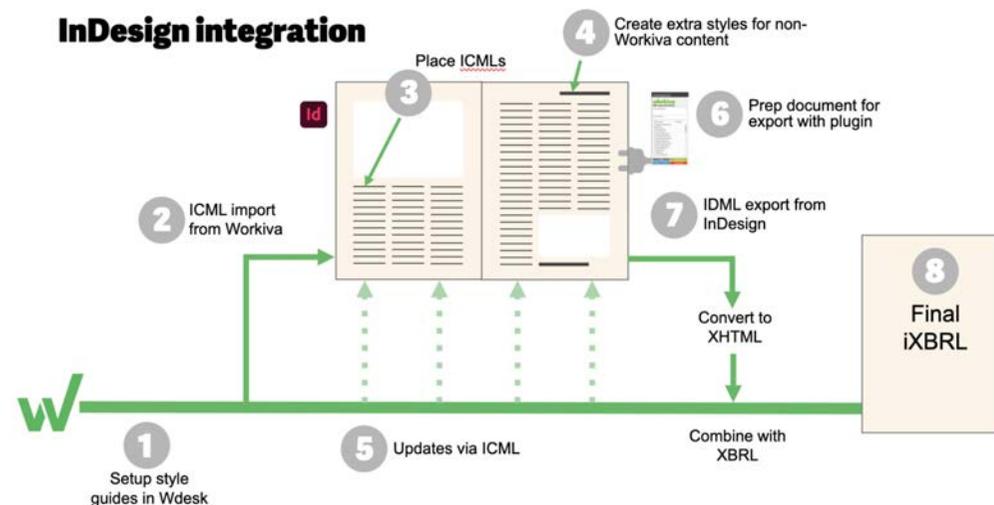## When does InDesign integration with Workiva work best?

Case 1
Design quality with lots of last minute amends: A recent client knew that they would get many amends two days before filing. By keeping the ICMLs linked until the very end of the project the designers were able to deliver 10,000+ amends in a matter of minutes just prior to filing.

Case 2
Design quality with data assurance: A recent client had a very creative story telling brief with their annual report and felt that InDesign was the best and easiest way to achieve that with ultimate "no compromise" design integrity.

Jurisdiction consideration - For reports that need to adhere to the European Single Electronic Format (ESEF) - look out for this sign

InDesign integration

Quick overview

Quick guide to InDesign integration

Below are the simplified steps to InDesign integration with Workiva. Following these steps carefully will guarantee 100% data assurance.

Step 1	Setup style guides in Workiva platform.
Step 2	The report content is created in Workiva and sent to the designer via ICMLs.
Step 3	Place ICMLs in InDesign. This can be done multiple times after edits.
Step 4	Create extra styles for non-Workiva content, edit style attributes and design!
Step 5	Content remains linked so no need to check amends.
Step 6	Audit and tagging all goes on in the Workiva platform.
Step 7	Export your IDML and convert to XHTML at Workiva, if required.
Step 8	iXBRL file from Workiva and PDF from InDesign.

Benefits to you, the designer

Workiva is the single source of truth where the client creates and edits the content for the report. You receive this content via linked ICML files which you place in InDesign, just like an image. You can still design but without the fear of accidentally changing the content or forgetting to do a correction, so the data assurance still remains 100%.

Jurisdiction consideration - Ultimately these steps will result in an iXBRL file that will look exactly like the PDF. We recommend that designers test early and get confident with this process.
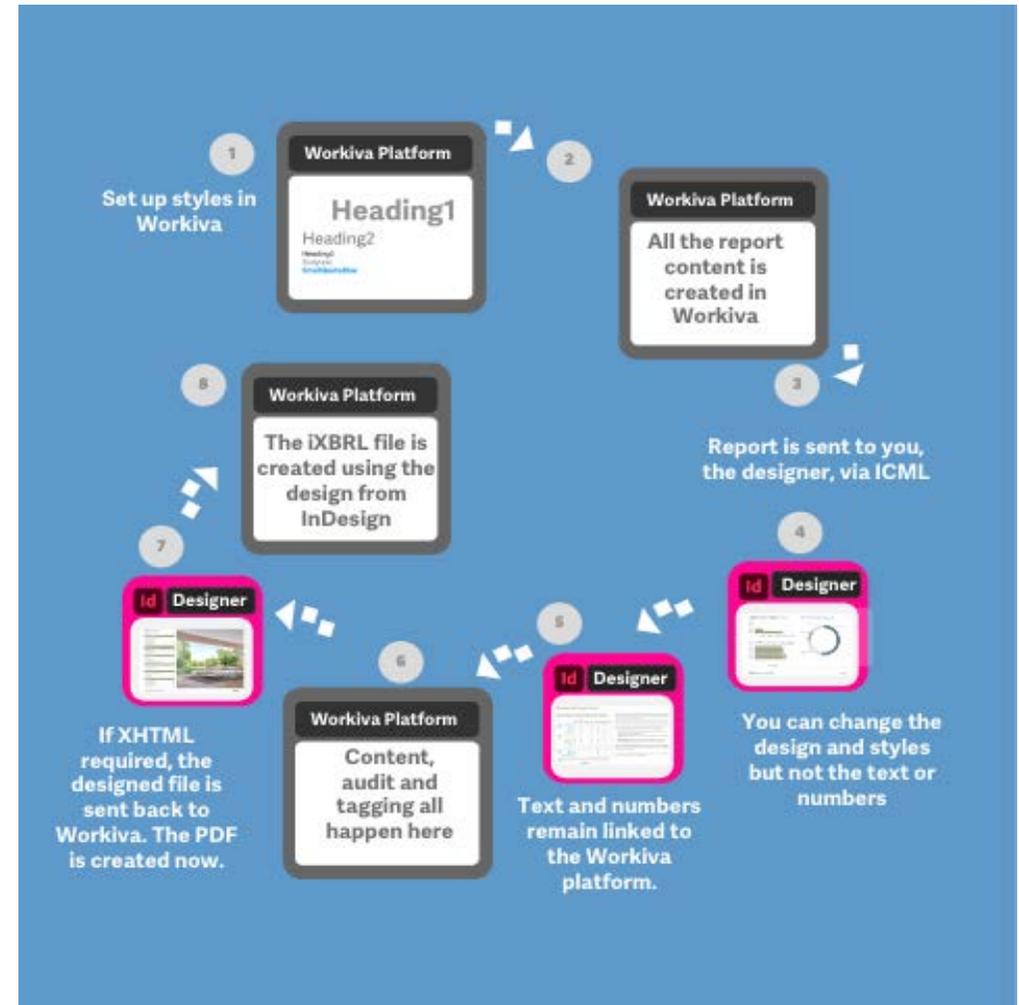
How to get content into Workiva

Workiva can import content from Microsoft Word (.docx). Even if you are designing in InDesign, your content authors are working in Workiva. They can start with a blank report or you can, for example, import a previous year's report.

Don't rush this part. Take your time. Ask where did this Word file come from? Originally created in Word (great!) or a converted document from PDF (not great)? Follow these guidelines for a successful outcome when exporting out of Workiva at the finish of the project.

Importing into Workiva

Starting with InDesign

In InDesign

A	Check the styles are not in folders
B	Make sure that all the styles have CSS compliant names - no spaces, do not start with a number and contain no special characters. Tip: Stick with Alphanumeric names, Camel-case or hyphened.
C	Make sure all colors are RGB not CMYK
D	Copy Content in sequential order from InDesign to MSWord

In MS Word

A	Check styles are applied properly in the Word file

In Workiva

B	Import the Word file into Workiva - File>Import
C	Make sure styles are applied properly In Wdesk
D	Perform any reformatting as needed

Starting with Word

In MS Word

A	Check if this is an original Word document - see *Old document concerns* below
B	Check all the styles are applied properly throughout the document
C	Import into Workiva as above

Old document concerns

Workiva can import a .docx file but designers need to be careful about where this Word file originated from. This is because it could contain:

- Hidden characters
- White space
- Tabular matter (tabs)

You might not see it in the Workiva platform, but it could create issues with exporting to ICML and XHTML later on.

If all you have is a PDF?

If all you have is a PDF document or Word document converted from a PDF, then we advise pasting the content into an ASCii text editor (Notepad++ on PC) first and highlight tabs or other whitespace characters and then open this text file in Word before importing into Workiva. You can use a *search and replace* to remove such items. This will take out all styling which you would then have to create and apply in Workiva. It will however remove all the potentially risky hidden code.

Importing content into Workiva

Document setup starting with InDesign

Document setup datasheet available on design reporting support hub

Best practice for all users

Roles and responsibilities

We really recommend that designers are allowed into a client's workspace.

Sharing of typesetting responsibilities
Workiva is collaborative platform environment where content creators, auditors, taggers and designers can all work together. This is great but could possibly become crowded unless managed properly.

Projects go more smoothly if:
- Everyone on the teams understands the basic structure of the report, applies the styles correctly and consistently
- Designers create enough styles for the whole report. This will help stop authors either creating unnecessary new ones or applying an override to existing styles
- Designers educate the team on when to use certain styles
- Designers check typesetting throughout the reporting cycle

Use of permissions
Permissions can control access to all or part of a document. Designers can use this when actively designing a section. Use the Advanced Permissions for this. You can easily revert to the previous permissions when you have finished.

Project calendar
Workiva can present a slightly different timeline to what you may be used to. There is a time element to importing content correctly on to the platform and to creating and applying styles. The design tools might behave slightly differently to what you are used to, which may impact your timeline and project calendar.

Use of blacklining
Blacklining is a great way to find where amends have been made on the Workiva platform. See the section on Blacklining **ICML milestones and blacklines**.

Remember, designers do not have to worry about amends or last minute changes!

We do encourage some upfront training. Our three design modules are less than an hour each and will really help you with your design implementation. Find out more on the **Design Reporting Learning Hub.**

Allow a bit more time up front but less time should be necessary further on up to filing day.

Introduction to structured content

**An introduction to the Workiva platform for designers**

Helping workflow

Document setup

For the Workiva platform to interact well with the InDesign software, you need to set up your report correctly. Taking the time now will reap benefits later on in the project.

Setting the document outline

The document outline represents the structure of the ICMLs. There is one ICML for each section or child of section. For example, if there are 100 outline (Index) items, there would be 100 ICMLs.

Platform Outline/Index/Sections

ICML folder structure
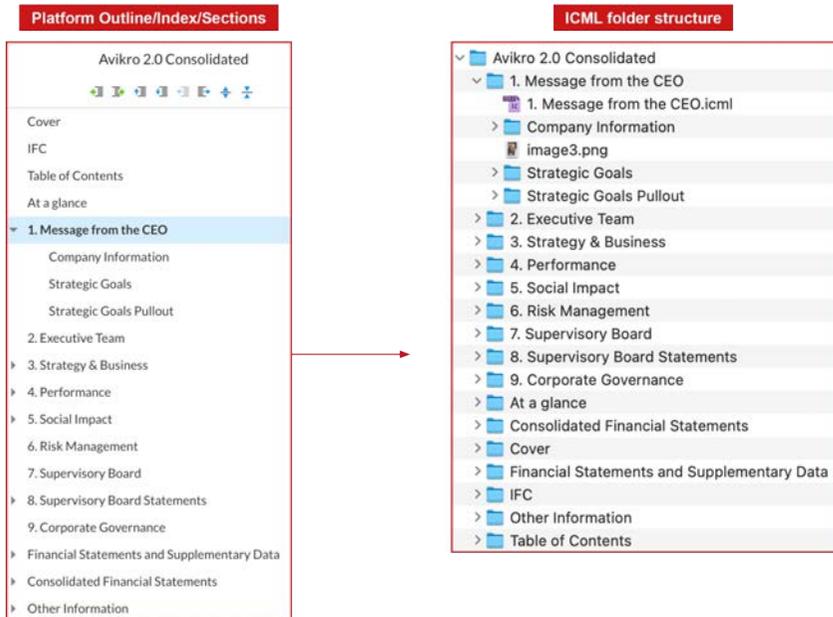
Top tip: Be aware that your exported folder structure may not appear in the exact same order. We cannot control how folders are ordered locally.

Create your style palette

All content in the Workiva platform should have a style attached to it. Styles can be amended on the platform to more closely align with your Design styles, if required.

For ICML export, the 'Normal' default style will be converted to the **Bodytext** style. See the section on **Style Guides**.

Style list

Style editor
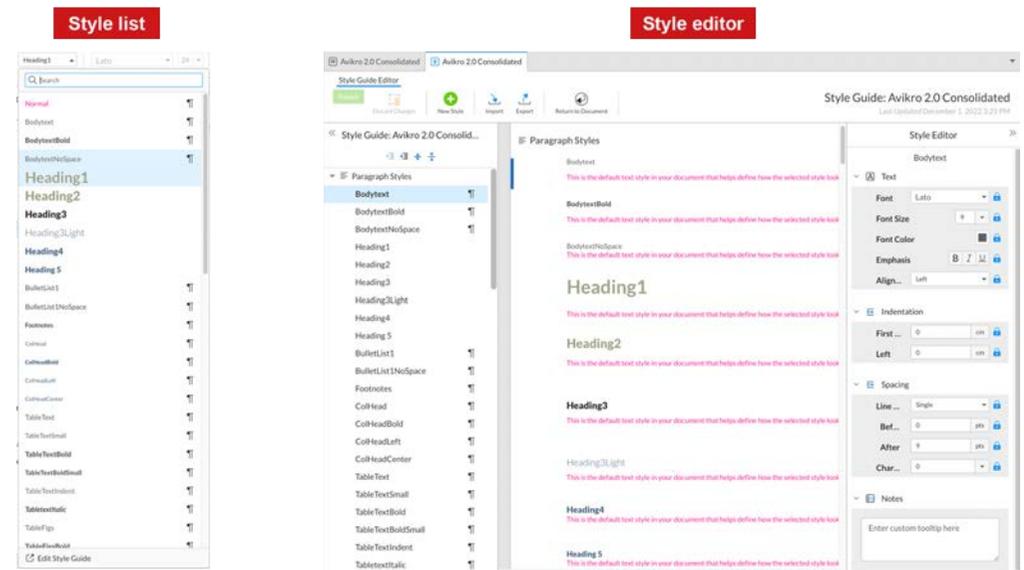
Headers and footers

Headers and footers can be generated in the Workiva platform however they **do not export** via ICML to the InDesign software. The export can only send content in between the grey dashed lines at the top and bottom of each page of the document.

Document setup

Typesetting considerations

Typesetting takes place in the Workiva platform **not** in the InDesign software. In multi-channel publishing, best practice is to **not** use a so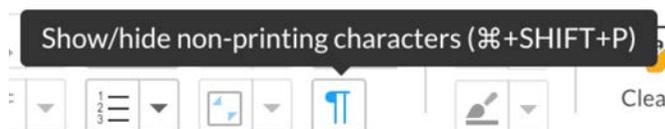ft return (Shift Enter). This creates a line break rather than a paragraph break. Click the Show/hide non printing characters on your Edit ribbon to see all soft and hard returns.

See **Typographic layout** for more considerations.

Page formats

It is important, in a multi-channel publishing scenario, to match the page format, margins and gutter measurements between Workiva and InDesign right from the beginning. A prominent reason for doing this, is the limitation in ICML of adjusting table and column widths. Therefore, these need to be the same in the Workiva platform as it is in the InDesign software.
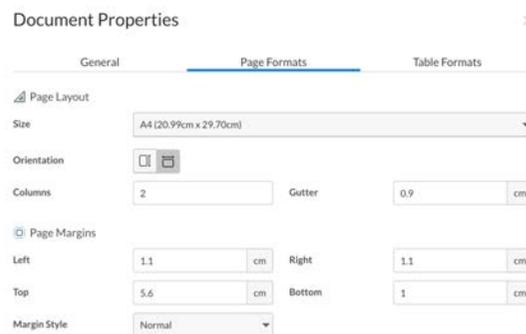
> **Caution:** If you do **not** match page formats between Workiva and InDesign, every table width will need to be adjusted. Your report may contain 300+ tables. This is to be taken very seriously!

For details on how to edit the Document properties of a platform document please see **The Widget-Platform**.

Landscape v portrait

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

The double page spread

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.

Jurisdiction consideration -for XHTML think about the use of double page spreads and mirrored margins in the design

Justified verses range left video available on Design Reporting Support Hub

Margins and gutters

workiva

Tables

Cell styles

The Workiva platform does not use cell styles. The ICML and XHTML exports contain an algorithm that summarises design parameters into cell styles for InDesign and CSS respectively.

Top tip: The automatically generated cell styles within the exported ICML are built around the following parameters:

- Cell vertical alignment (Top Middle or Bottom)
- Cell edge weight and color (all 4 edges are unique)
- Cell fill

Every unique variation will create a separate style.

So consistent styling and alignment is key to limiting the generated cell styles to as few as possible.

Inheritance

The ICML export now uses the concept of inheritance or 'Based on' in both character, paragraph and cell styles. This is extremely useful for designers to be able to control large amounts of styles efficiently. Particularly the auto-generated styles.

Top tip: All cell styles in the InDesign software are auto-generated. They are based on a style called *NoRule* so CellHeight can be controlled using PaddingTop and PaddingBottom from here in the InDesign software.

Cell types in Workiva

Designers new to the Workiva platform need to be aware that the cells are active in terms of content formatting. For instance, cells can be nominated as accountancy, text or number with decimal places automatically attributed.

Table and column widths

Designers need to be aware that table and column widths cannot be altered in linked ICMLs. These need to be correct in the Workiva platform.

Top tip: For a more information on how to style and work with tables on the platform, please see *The Widget-platform.*

Colored brackets

You may see Colored brackets around financial figures when you place your ICML files. These are placeholders for the XBRL tagging and do not hinder your design capabilities at all. You can just ignore them.

Top tip: Tables in the Workiva platform must be set to the **correct width**. This cannot be changed in the InDesign software.

Table or galley?

Successful Workiva table formatting and InDesign

Style setup

Workiva is a multi-channel publishing environment. Content created within documents can export to a variety of outputs - **PDF**, **HTML**, **DOCX**, **ICML** and **XHTML**.

Because of this reusability of data, designers need to work with structured content and Workiva structures that content by using styles.

Style guides

A style guide is a set of standards for the design of a document that ensures formatting consistency throughout and/or across multiple documents.

Set up the styles

There are two ways a designer can do this
1. Set up the styles in the Workiva platform
2. Create the styles in the InDesign software and import back to the Workiva platform via Microsoft Word document/software

What to call each style

You need to consider styles for all your content. When choosing a style name, it is a good idea to choose a name that reflects the use of the style, for example:

CaptionSmallBlue or *TableTextBold*

This will help everyone on the team understand the structure and apply the correct style to the content. We call this **semantic styling**.

Styles always start with a letter	No spaces or special characters

Style names can contain letters and numbers but should **always start with a letter**. For example:

Heading1 is good ☑. 1Heading will not work ☒

Characters such as - !@#$%^&*()_+-={}:"<>?[];',./`~ etc and **spaces must be avoided.**

Lock the styles

Once created, designers can lock the styles and their attributes. This stops authors changing an aspect of that style. You can lock:

*   The font family, size, color and emphasis
*   Alignment, spacing and indentation

> **Top tip:** Designers can also add a note to the style. This might help your user when choosing the style. When they hover over the style in the style palette, the note appears alongside the style attributes.

Benefits of using a well constructed stylesheet

*   Efficient authoring for clients - you want everyone to be a good typesetter!
*   Document health and consistency
*   Easier evolution/rollover of styles in subsequent years
*   Value creation - enables your report to be used by Workiva's WebAPI for example

> **Top tip:** Don't use the 'Normal' style in the Workiva platform. The InDesign software can have issues with this default style. **Bodytext** is a special style and should be the same in both the Workiva platform and InDesign software

Exports from Workiva

Importance of a style guide

Importing content into Workiva

workiva

Style setup

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

Top tip: 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.

Top tip: If the ribbon is clicked to amend the style of selected text in the Workiva platform then an override style will automatically be created. This is clearer to see when ICML is being exported as each overridden style will create a unique style in InDesign.

Top tip: 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 a 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.

Top tip: 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.

Top tip: Don't use tabs! Create an indented style

▶ **Why have I got so many styles?**

▶ **Rogue styles**

Format painter icon

Format painter icon after 1 click

Format painter icon after 2 clicks

Color management

For XHTML, only RGB colors must be used as RGB is the only color format supported on the web. The InDesign software uses CMYK and Pantone spot colors for the printing of ink on paper.

The web cannot use these color formats as RGB is the default color space of the web. If the InDesign software is being used to author and this content is to be converted to XHTML then RGB (Red, Blue, Green) colors must be used.

Converting CMYK to RGB is not straightforward. So it is best that designers specify RGB in their InDesign documents so accuracy is maintained and there are no surprises when converting.
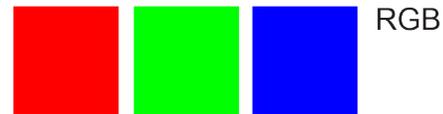
Jurisdiction consideration - RGB colors must be used for ESEF filings

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 rather than relying on conversion.

Top tip: All colors need to be in RGB for web use

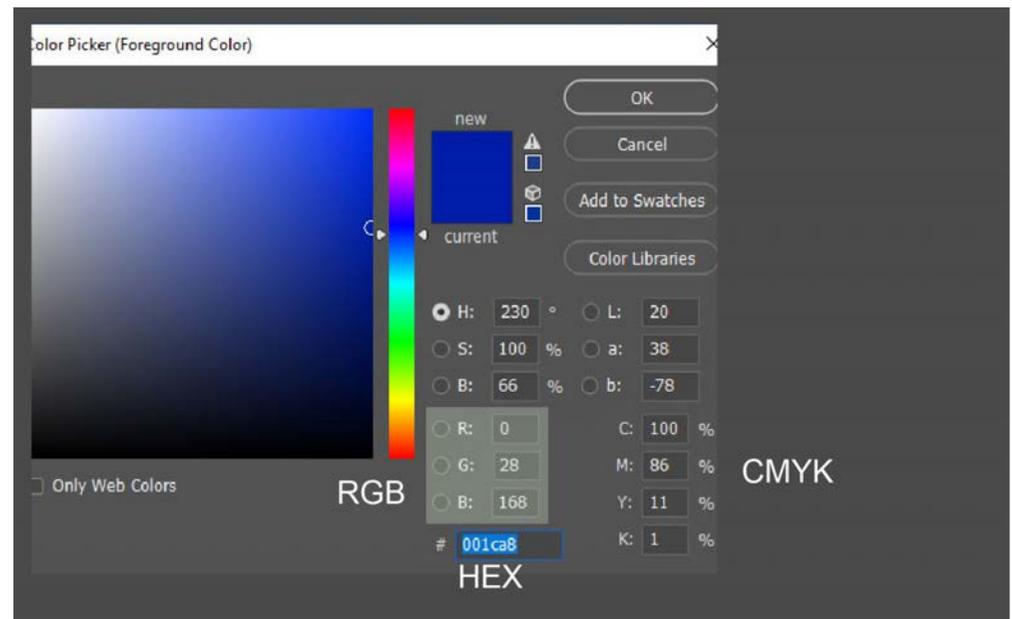**Top tip:** Remember screen limitations when choosing colors for the web.

Top tip: Make sure you have enough color contrast for good readability for all users. This can also be an audit issue.

RGB

CMYK

Color Picker (Foreground Color)

new

current

OK

Cancel

Add to Swatches

Color Libraries

○ H: 230 °   ○ L: 20
○ S: 100 %   ○ a: 38
○ B: 66 %   ○ b: -78

○ R: 0   C: 100 %
○ G: 28   M: 86 %
○ B: 168   Y: 11 %

001ca8   K: 1 %

☐ Only Web Colors

RGB

HEX

CMYK

Color management

Using the color palette

The platform color palette has 64 standard colors but beneath that 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 would be where you would add document specific colors.

A color palette is only linked to a users own account and therefore to give additional users the same custom colors, it is necessary to input them into each users' own custom palette separately.

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

Adding custom colors

To add a custom color to your palette you only need to 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 for your desired color and then click add.

Custom Colors

f4333f [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.

Managing RGB and CMYK workflows

More information about the use of custom colors at Workiva Support

Fonts

Licensing

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

At the moment 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. We advise designers to check with their client regarding font usage if they are not in the Workiva platform.

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.

Web fonts (woff and woff2)

Web Open Font Format is now the standard for font usage in browsers and OTF and TTF fonts will be converted to these formats at upload time. Supported browsers and versions are below. Discussion is taking place re TTF support for older versions of these browsers.

Chrome	Safari	Firefox	Opera	IE	Android	iOS
5+	5.1+	3.6+	11.50+	9+	4.4+	5.1+

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 the InDesign software are uploaded with your IDML at conversion time. You will need to zip the IDML and font folder for the import. If the fonts are available in the Workiva platform, this step is not necessary.

Jurisdiction consideration - For ESEF, fonts used in iXBRL format must converted to base64 format and embedded in the CSS

Custom fonts

These include fonts constructed for licensing reasons or decorative usage within text. Please test thoroughly with the IDML>XHTML process so that you are confident that the font construction is suitable for the Workiva platform conversion process.

Renaming of fonts

Please be aware that renaming fonts can render them inoperable or cause them not to appear. The Workiva Integration Tool (plugin) log file specifies both familiar and postscript names of fonts being used in a document.

Link to list of fonts on platform

[Click here] for an up to date list of supported fonts.

Typographic layout

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 a design and make the content longer than it needs to be. Designers have deployed a number of methods over the years with InDesign to remove *widows*.

The soft return method

This method is now widely depreciated 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 the previous line. This can be replicated in XHTML but can have unforeseen issues in the rendering of that content.

The condensing method

As above but instead of kerning the characters are condensed in width (eg: 95%). This can be replicated in XHTML but can have unforeseen issues in the rendering of that content.

InDesign compositor method

The InDesign software has an algorithm that can avoid widows. It is not recommended for multi-channel use and is not deployed by designers for responsive design.

Recommended method

Our recommended method of widow management is the use of **nbsp**. This can be done in the platform easily and is exported via ICML and converted via IDML 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   or   effectively making two words one word. This is ignored by search engines and can't 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.

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 get the best from multi-channel publishing, think XHTML first.

Hanging indents

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 then they will need to edit the CSS in post-production. Expertise will be required for this as it is not something Workiva can support.

Typographic layout

Hyperlinks

External hyperlinks are supported.

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

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. The InDesign software has very sophisticated tools for justification that cannot be replicated in XHTML. Please avoid if you can and use range left (called ragged right in some jurisdictions).

Justified verses range left video available on Design Reporting Support Hub

Grep

Grep (global regular expression print) is used a great deal by designers to control many aspects of typographic layout. There are two types of Grep within the InDesign software.

Grep within styles

This is sometimes called nested styles. These are regular expressions that match certain patterns based within content that is styled with a particular style. The Workiva platform does not support Grep within styles.

Grep within Find and Replace

These are regular expressions used within the 'Find and Replace' function of the InDesign software and can only be used on unlinked content. These are permanent alterations to the content. This can be done after the ICMLs are unlinked in preparation for the conversion process of IDML>XHTML.

A good example of the use of Grep in the InDesign software with Workiva content is changing em dashes (U.S.) to en dashes (EU). A nested style can be applied to table figure styles to make that change on ICML content. That Grep will need to be applied with Find and Replace when the ICMLs are unlinked to make that change permanent.

Lists

Custom styles for lists can now be created in the Workiva platform. These are still treated as an override but can now be identified within the InDesign software as that custom list style.

For IDML export, do not split a bulleted item across text frames. The list can be in multiple frames but not an individual bullet.

Image specifications

Many reports will also be printed in addition to any XHTML requirement. In this case designers will need to keep two sets of assets (images and charts) for different publishing channels.

Traditional print images

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

Web image 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	Web (XHTML)
.psd (cmyk, 300dpi)	.png (rgb, 72dpi)
.tiff (cmyk, 300dpi)	.jpg (rgb, 72dpi)
.jpg (cmyk, 300dpi)	.jpg (rgb, 72dpi)
.ai	.svg
.eps	.svg

Adobe Illustrator software is capable of producing both AI, EPS and SVG formats. Most image editors like Photoshop and GIMP can produce all bitmap formats.

The major difference in using images between print and web is that web images are cropped to the borders of the frame whilst images placed in InDesign are often not. For a traditional DTP designer this presents an extra process whilst for web designers, this is common practice. Designers need to find a dual solution that suits them and preserve appropriate quality for all channels.

Top tip: A quick way of cropping a large amount of images placed in InDesign is to export the document as a JPG at 96dpi. You can then open the pages in Photoshop or Gimp and crop easily there. You can then replace those images in InDesign with your newly cropped images.

Embedding images in InDesign

All images being exported in IDML must be embedded in the InDesign software. This converts the image to based64 code. It is this code that is copied into the XHTML. There is no manipulation of images.

Print and web images

For designers setting up a document for both the iXBRL and PDF formats, there are two solutions to address the management of differing image assets.

1. Use two layers - one for web and one for print
2. Use two folders and when it is time to change from one to the other, you can use the built-in swapping tool in the InDesign software.

RGB or CMYK first?

It is advised that designers work in RGB first and convert to CMYK at an appropriate time when printable artwork is needed.

Older JPG issues

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.

Images over a double page spread

Large images used across a spread (two pages) need to be separated/split into single page usage.

Image specifications

Images and file size

Images should be cropped to the containing frame size, reduced to 72dpi or 96dpi and be RGB. They should be of file type - png, jpg or gif.

Infographics

The recent history of the InDesign software has seen it increase its ability to create more complex infographics. We encourage designers to test such pages in their reports with our IDML>XHTML converter. If the results are not satisfactory, because there are certain aspects we do not support, then it is very easy to convert such graphics to SVG. The steps to take are;

1. **Copy infographic to Adobe Illustrator software**
2. **Save Illustrator file to SVG**
3. **Place SVG in the InDesign software to replace infographic**

You will need to make considerations on embedding the glyphs of any fonts used or convert text to outlines.

Multiple effects and images combined as a single image

It is possible, in the InDesign software, to create very complex, composite images using a combination of bit maps, gradients and other effects. These are not easily converted. It is better to take composite images and export them from the InDesign software to create a single image such as JPG, PNG and replace the composite image in the InDesign software with that image.

The infographic above was copied from InDesign to Illustrator and exported as SVG and placed in InDesign.

Easy image optimisation

Managing RGB and CMYK workflows

ICML

ICML (InCopy Markup Language) is an official format of InDesign software and is used for importing and exporting structured content. It is a linked file meaning the content of an ICML file cannot be edited, within InDesign, unless the user breaks the link. This is the foundation of data assurance that Workiva offers when integrating with InDesign.

ICML - InDesign integration

ICML import best practice

Check all content is styled

Before you pull your ICML from the Workiva platform, make sure that all content has a custom style attributed to it. The default setting in the Workiva platform is 'Normal' and this style is converted to Bodytext on export via ICML. An easy way to identify 'Normal' is to change its color to a contrasting color for easy spotting eg bright pink.

Top tip: The "Normal" style will always be changed to "Bodytext" in ICML export. So it's a very good idea to always create the "**Bodytext**" style (the exact spelling) in you custom styles so that you can control the look and feel of the style as exported in ICML.

Import early

We recommend importing fairly early in the reporting process. Subsequent timings of ICML pulls should be discussed between designer and client.

Import a quantity of ICMLs before changing attributes

One ICML represents one outline item in the Workiva platform and this ICML only imports the styles associated with that outline (section).

It is recommended that designers import enough ICMLs into InDesign to capture all the custom styles being used before making any changes to those styles.

### Using the ICML to spot and correct style irregularities

All content will come through with a style in ICML. So any overrides applied to text will be picked up and cause an additional style to be created. Some of these differences may be wanted and some may not.

These override styles will normally contain the base styles name, followed by a string of numbers.

Once all the ICML has been imported the designer can look through their InDesign file and review these styles.

Using the Find/Replace in InDesign, you can search for where a style is used. You will need to include locked stories and maybe locked layers, for the search to identify styles used in the ICML.
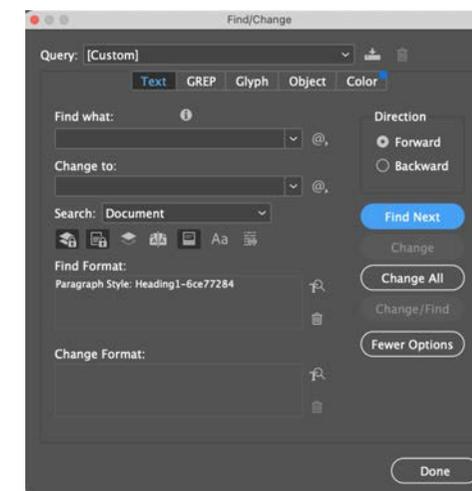
You can also check the General tab in a styles options in InDesign, as it may tell you straight away what the override is. i.e. a right indent would be visible as extra info in the general tab.
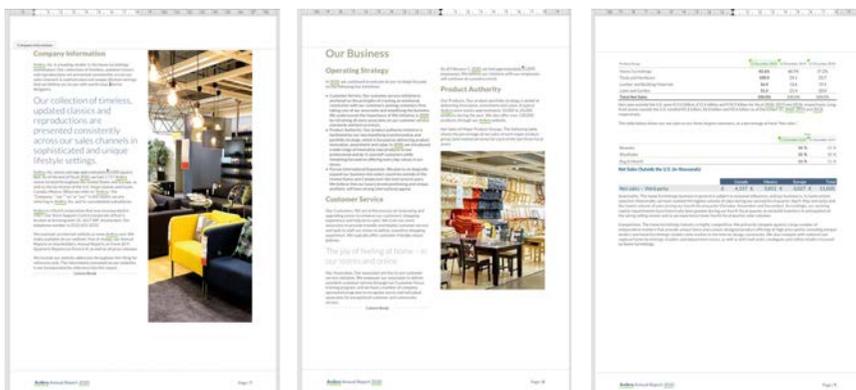
Once the override is identified, correct it in the source document, re-export an ICML and if all instances of the override are removed then the style can be removed from InDesign using 'Select all unused' in the style list and then deleting the unused styles.
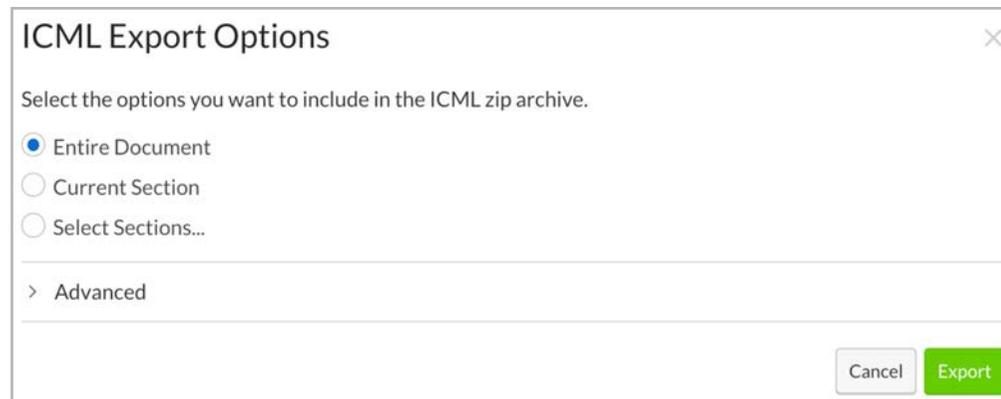
workiva

ICML

ICML export

Exporting ICML is done by choosing Save As > InDesign (.icml) from the file menu but here we will walk through the process with an example section.

Here is a section called 'Company information' which has content over 3 pages and a couple of pictures uploaded onto it.

- ▼ 1. Message from the CEO ●
-    Company Information ●
-    Strategic Goals ●
-    Strategic Goals Pullout
- 2. Executive Team ●

To export this as ICML, do the following:
From the File menu, choose Save As / InDesign (.icml).

Save As   Import ▾

Template...

EXPORT

PDF (.pdf)

EDGAR (.htm)

DOCX (.docx)

InDesign (.icml)

XHTML (.xhtml)

This opens up the ICML Export Options window.

ICML Export Options   ✕

Select the options you want to include in the ICML zip archive.

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

> Advanced

Cancel   Export

Here you have the option to export in the following ways:

Entire Document

As the name suggests, this will export the whole Project to ICML.

ICMLs are exported within a folder structure that represents the Workiva platform outline for easy identification.

When initially linking a project's ICML to your InDesign file, it is a good idea to export the Entire document, as this will be your folder structure going forward.

- ⌄ 📁 Avikro 2.0 Consolidated
-   ⌄ 📁 1. Message from the CEO
-       📄 1. Message from the CEO.icml
-   ⌄ 📁 Company Information
-       📄 Company Information.icml
-       🖼 image4.png
-       🖼 image5.png
-     🖼 image3.png
-   > 📁 Strategic Goals
-   > 📁 Strategic Goals Pullout
- > 📁 2. Executive Team
- > 📁 3. Strategy & Business

Top tip: If a section moves or is renamed then it will change in this folder structure as well.

workíva
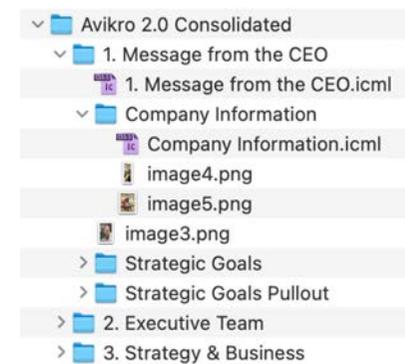
ICML

Current Section

This will be the section you currently have selected in the Index, in our example we have 'Company Information' selected in the Index.

Select Sections...

Select Sections allows specific sections to be selected. Clicking on Select Sections will open up a menu where all the sections are listed and you can select whichever sections you wish to export.
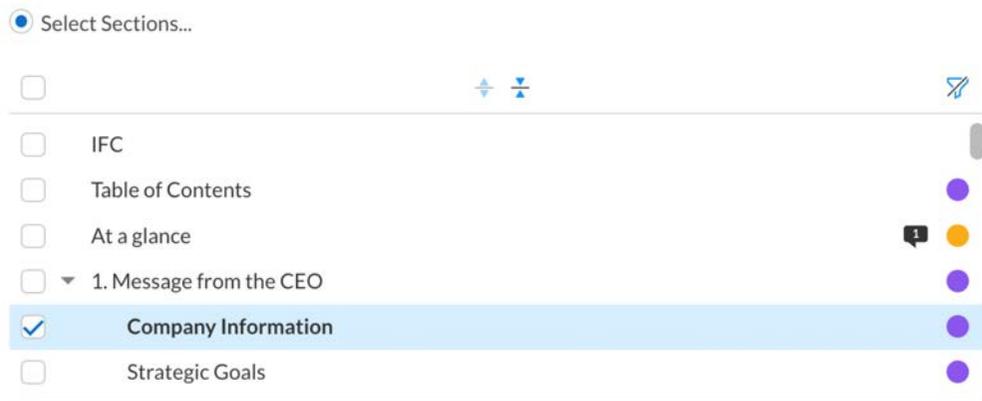
Advanced

The Advanced menu sits under the export options and allows for some further tweaks to your export.

These are:

Combine Subsections into Parent Section - This will combine child sections with a parent section. Consider carefully the pros and cons of combining sections.

> **Top tip:** If sections are combined, you would need to do this every time you export those section to get the same ICML content.

Use Fixed Row Heights - This will export table rows with a fixed height, based upon the height set on the platform for each row, as opposed to row heights being changeable through the cell styles in InDesign.

> **Top tip:** If row heights are fixed in the ICML export then if there is overmatter in a table, it will also be obscured in InDesign. Always preflight your InDesign file to spot this.

Use CMYK Colorspace -This will convert all text and tint colors from RGB to CMYK in the ICML. There is no control over the conversion, so if you plan to color correct your ICML in the future then you are probably best off sticking to an RGB workflow.

Export gutters - This positions currency symbols in nested tables into a separate cell for alignment. This is generally only used for US customers.
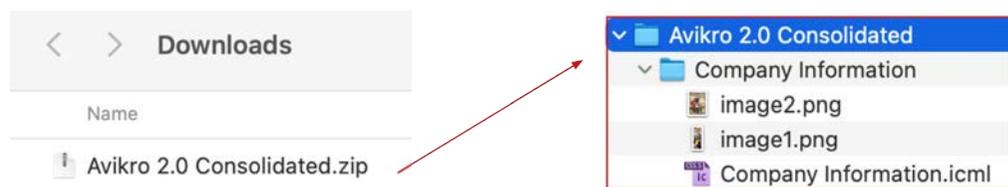
ICML

Once you have selected your options you, click Export and your chosen ICML will be downloaded to your Downloads folder.

Whilst downloading a small popup will appear on screen.
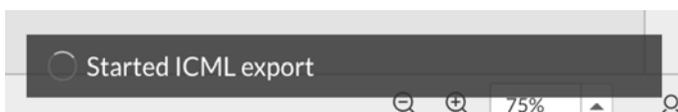
The zip filename will always be the same as the document it was exported from.

The zip file will contain folders named, as per the sections your chosen ICML were contained in. The zip will also contain the ICML files and any images contained within the sections.

In our example section we had 2 images. In an InDesign/ICML workflow, you would normally use the images contained within your artwork file as opposed to the versions exported with any ICML.
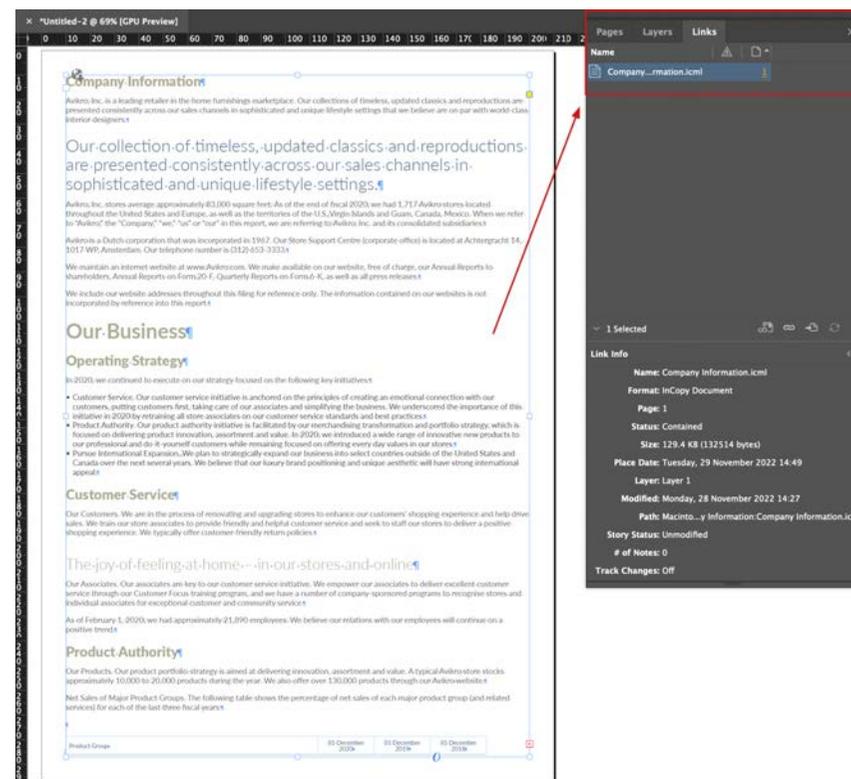
The downloaded ICML and/or folders can now be moved to where your ICML are to be stored for the remainder of the project.

> **Top tip:** Never link to ICML directly from a downloads folder. You should always have your master ICML files located in one location and override them as required after a new extraction.

Place ICMLs

To place an ICML file you can either, in your InDesign document, go to File>Place and navigate to your ICML file or simply drag and drop the ICML file straight into InDesign. You can also place ICML straight into pre-created text boxes (as long as no other content already resides in them).

Once placed, the ICML can fill one or multiple linked text frames and a link to the ICML will be created in InDesign. It works similar to how a picture would link.

ICML

Below we have a sample ICML, laid our in our InDesign file. Some text styles have been modified and imagery added.

The lines that can be seen running from the selected text frame to the others on the page are called Threads and these show the flow of the content between linked text frames. These can be switched on and off though the main menu View>Extras> Show text threads.

The text frames holding the ICML content can be placed at whatever size and position the designer requires but the ICML content will always flow in the same order.

Maintain the links

Once the InDesign document is built and the ICML are linked, your Links panel is the easiest place to see which ICML is which. If you right-click on a link in this panel and select Go to link then InDesign will jump to the link's location.

For data assurance and so that you don't need to worry about versions or checking of content, make sure you don't break the links of your ICMLs.

ICML

Update the links

When new ICMLs are exported from the platform, it is best practice to overwrite the previous linked ICML. This is because you don't then need to relink the ICML in InDesign but instead can just update the link.

To do this you need to:

1. Export your new ICMLs
2. Unzip the new ICML zip file in your downloads folder
3. Locate the ICML folder that InDesign is linking to
4. Either replace folders with folders or individual ICML with individual ICML. The main thing here is not to break the structure as each ICML linked. InDesign will retain the network path and that is what you don't want to break.
5. An updated ICML will appear in your InDesign file with a small Triangle next to its name.

6. Right-clicking on an updated ICML or group of ICMLs in the Links panel will bring up a window where you can choose to 'Update Link'. Clicking this will update the ICML in InDesign.

It is up to the designer whether you wish to keep all previous ICML exports but the history of changes is also stored on the platform with the source content.

Updating the ICML will only bring through the fresh content for that section. All your design values will remain in place.

Style changes

Each ICML will bring with it the styles used on the platform for that section. They will only come in with the first ICML import and will not be overwritten by subsequent imports.

This allows the designer the freedom to modify the styles parameters in InDesign (but not the name, as that is required to perform the handshake with the ICML on where the styles are applied). So, for example Heading1 can be changed in InDesign to a different color and all Heading1s in InDesign will appear that color and any new ICML pulls will still appear with that color.

This does not change the color settings on the platform file however and if styles are to match then the same change would need to be made there. Also, as ICML styles do not overwrite in InDesign then changing the color of Heading1 on the platform first will not overwrite the style settings in InDesign.

Apart from with the first ICML import, the only other time a style will come in new, is if it was renamed on the platform or a newly named style is added (you can see the importance of names). So changing a style attribute in the Workiva platform will not update the corresponding style in the InDesign software.

ICML

ICML milestones and blacklines

When you have decided, with your client, dates for ICML imports to the InDesign software, it is a good idea to create a **milestone** in the Workiva platform. This means you can track content changes between the subsequent ICML pulls by creating a **blackline**.

This is also really useful for seeing what sections have changed, as you may only need to export a few sections as opposed to the whole document and it can also help to show where large content changes have been made, which can help you to potentially re-layout a section before a proofing date.

Towards the end of the project, we advise doing one whole ICML pull of the whole document to absolutely make sure every ICML is the current one.

Creating a milestone

To create a milestone in a Workiva document you need to access the document History panel. It will be one of the tabs to the right of your screen.
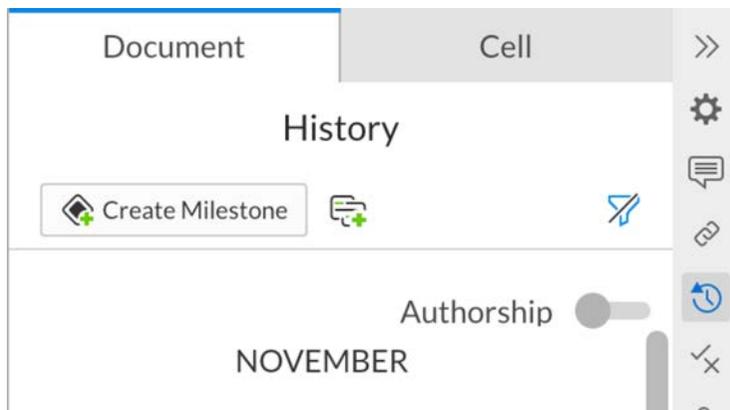
From here you can either create a brand-new Milestone by clicking 'Create Milestone' or you can select any existing date and time and create a milestone there. This is done from the dropdown alongside the date.
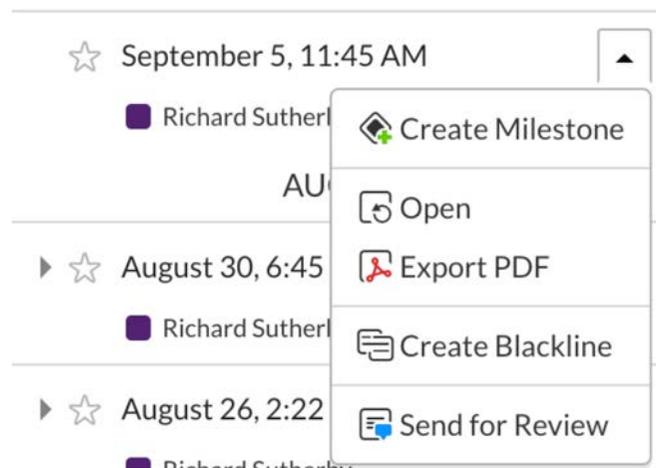
The milestone will ask you to give it a name ('Proof' has been used for this example) and add any remarks (optional). Then click Create and the milestone is created.
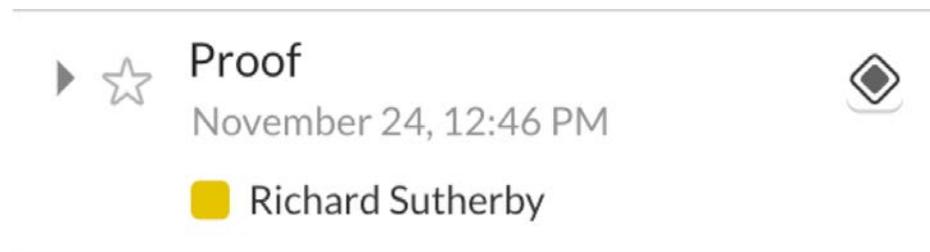
The milestones standout in the History list, as they have a small diamond next to them and the History list can also be filtered to only display milestones.

ICML

Creating a blackline

To create a blackline on the platform, go to the History panel of your document (a tab on the right-hand side of the screen) and click the dropdown menu for either a date and time (revision) or a milestone and select Create Blackline.
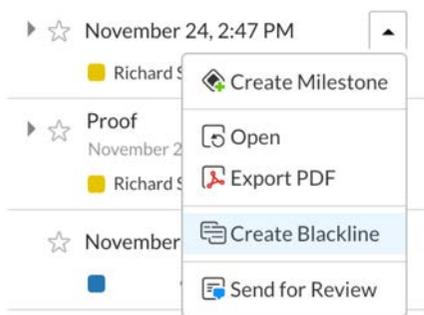
This will open up a box at the top of the History panel with your selected revision/milestone at the top and a space for the comparison revision/milestone.

Any revision/milestone can be just dragged and dropped into the 'Drop Milestones and Revisions Here' box.

Also, if you only want to see what sections have been amended between the two points in time then you can tick 'Only include sections with changes'.

When you have made your selection, click Create to generate the blackline.

Top tip: Using a blackline and selecting 'Only include sections with changes' is a great way to see what sections need to be exported as ICML, which can help speed up the process when pulling through new ICML.
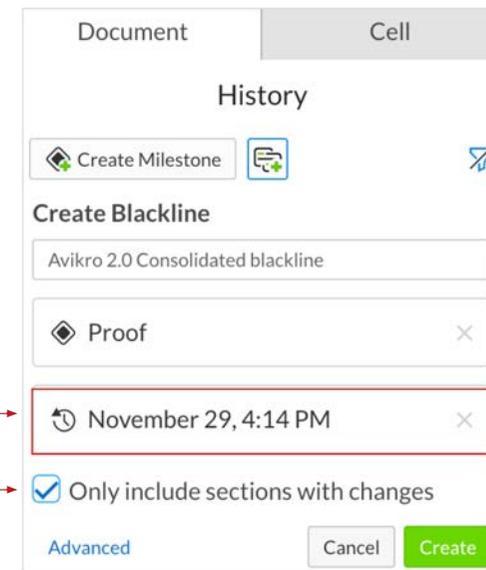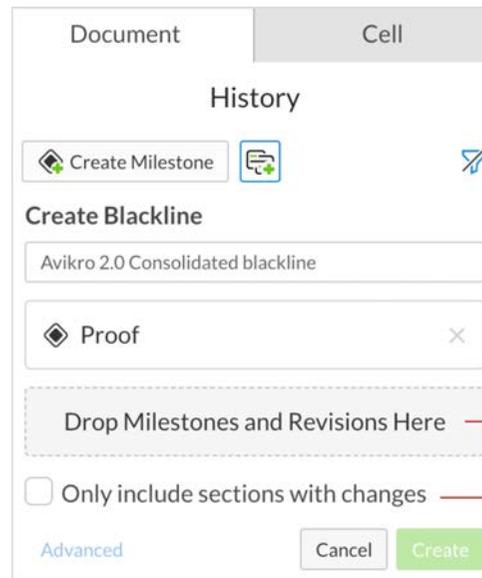
The blackline will appear in the Blacklines menu. It should automatically jump to this menu but if not then it can be found in the tabs along the right-hand side of the screen. To open your Blackline, hover over it and use the dropdown to select Open.
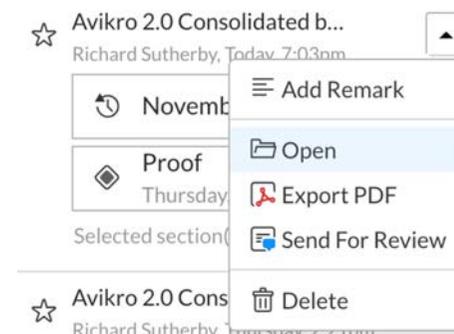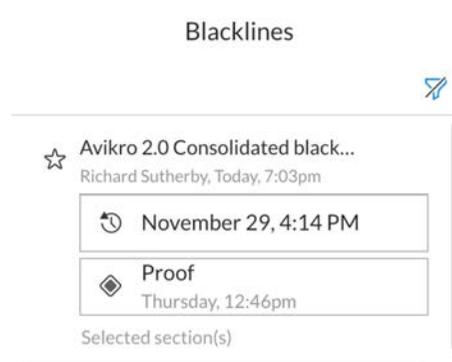
ICML

The Blackline will open in a new tab and you can scroll through the document to see all the changes.

To the left of the page view is a list of all the Sections that changes have been made in. If you are generating the blackline to identify what sections to download as ICML, then this list is where you get those names from.

You can also use this as a quick visual guide to how extensive the changes are and to make sure you have updated the ICML correctly.

Top tip: The Blackline opens in a new tab. To return to the main document just click the Main Documents tab or just close the new tab.

Workiva Integration Plugin

Workiva Integration Plugin for InDesign Software

The purpose of this plugin is to support the conversion of InDesign to XHTML. Initial content should be created in the Workiva platform and exported as ICML, then imported to InDesign. The Workiva Integration Plugin for InDesign software should be used as designers are preparing the artwork, and before bringing the content back into the Workiva platform as an IDML file.

The plugin is provided so that designers have a validation tool that identifies issues within an InDesign document that would corrupt or are otherwise not appropriate for conversion into XHTML. This plugin is easy to import in both Mac and PC versions of InDesign and writes a report at the click of a button. In all cases the things we point-out are XHTML conditional and not a specific condition of the Workiva platform.

The Stop/Start button

If you want to monitor the ICML, use the Start and Stop buttons. You can press Start when the ICML is initially imported, or wait until later in the process. This is optional.

Import (ICML)

Locates the file exported from the Workiva platform.

Ungroup

All items should be ungrouped. This helps to ungroup all grouped items existing in the InDesign file in one click.

Validate

Pressing this button produces a log file (validation list) showing warnings based around converting this document from IDML to XHTML. This log file can be found in the same folder as the InDesign file (.indd). This should be reviewed before every import into the Workiva platform.

Validation list

Top tip: The validation list will let you know if something needs to be updated, or will include some best practice informational items.

Split

Split will run through your file and break all threaded text frames into separate unthreaded text frames whilst retaining the content each frame held before splitting.

As of 2023 please review the "Block Tagging" section for more information in using split text frames.

Jurisdiction consideration - Due to the requirements of block tagging, ICMLs must not be split, except for testing or for the final submission version.
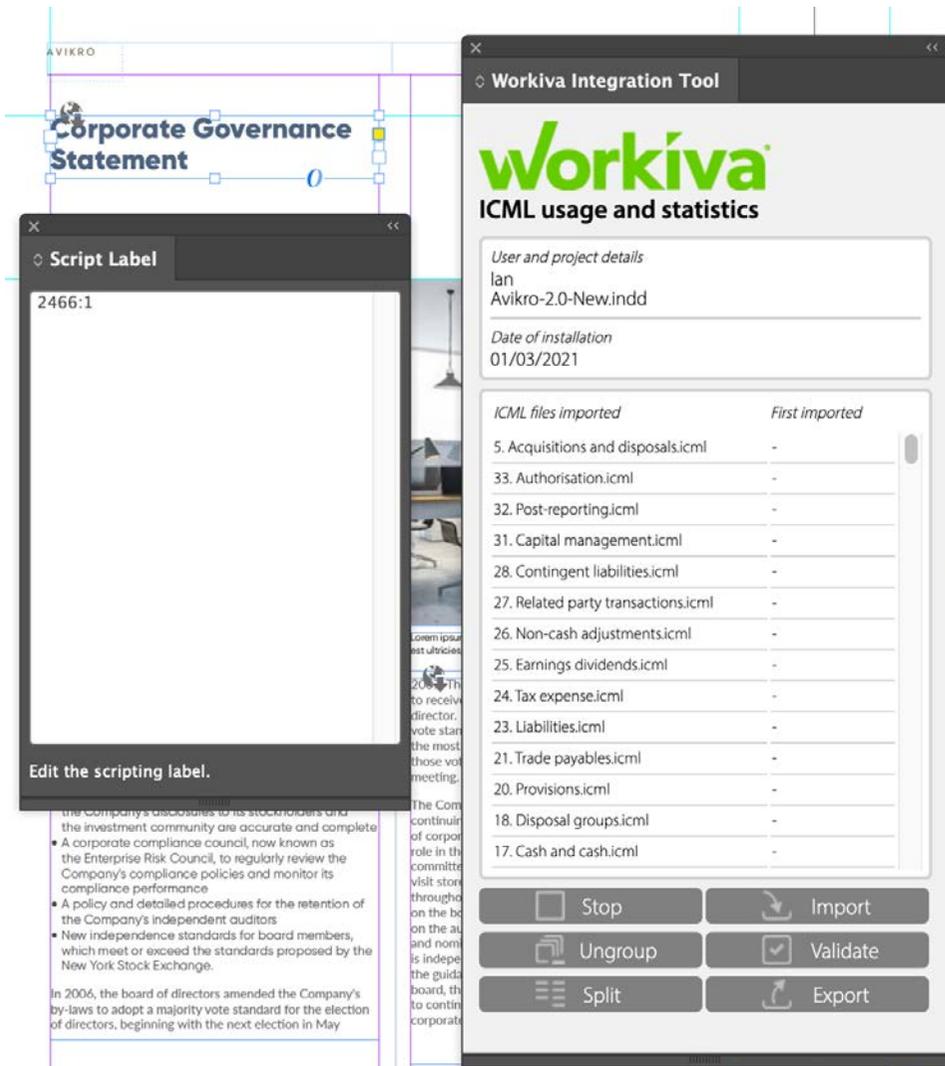
The Split function in the Plugin must be used, as it sequences the frames, which is necessary.

Export (IDML)

Exports IDML from the InDesign file to your desktop.

Block tagging

Year 2023 changes

Jurisdiction consideration - Please read this page if your report contains block tagging - for example filing under the ESEF mandate

Block tagging of the notes and eventually other areas has now been introduced in ESEF and such paradigms are likely to follow in global ESG taxonomies. So even if you are not involved in an ESEF project it may still be relevant to you if you are using InDesign.

So what is block tagging and why is it different from normal tagging?

A normal tag looks like the following;

<tag>item</tag>

Whereas a block tag looks more like;

```
<blocktag>
    <tag>item</tag>
    <tag>item</tag>
    <tag>item</tag>
    Text can also be contained
    <img src=""/>
</blocktag>
```

In other words a block tag can contain other tags, multiple lines of text and even an image. Now let's look at what the specific InDesign problem actually is.

Top tip: Block tagging needs the actual content in order in both human-readable form and the underlying XHTML code itself. So any processing of an InDesign IDML file will need to re-order that content if it is not in the correct order.

InDesign has no-sense of story order

When content from Workiva is placed into InDesign, the contents of a block tag can be split across multiple text frames and/or pages. That is what makes the non-ordered InDesign stories a problem unless you give it something that any post processing can use to set that order. InDesign tends to work top-left to bottom right hence why skipping through a PDF from an InDesign file can, occasionally, be a problem. The code itself is laid down in the order that it is done, not the human-readable order.

The solution

The **Workiva Integration Plugin** has a function/button to split text frames. You will now need to use this function instead of the InDesign built in script.

This function adds a number in the *script label* that lets Workiva know the order of the text frames in a series of previously linked text frames. We can use this series of numbers to process the code in order.

Block tagging

Once the linked text frames are split via the Workiva Integration plugin, the following five text frames will have script labels as follows;

2466:1, **2466:2**, **2466:3**, **2466:4**, **2466:5**. The first part is a story identification number and the second part is the actual text frame number itself. So we now know the story order.

There are some *edge* cases to be aware of as well.

What happens if a block tag contains two sets of linked text frames or two separate text frames that have never been linked?

Answer one: Start with the first text frame or text frame series and note the story number. In the following text frame(s) change the story number and the text frame number to follow on. So in the case below we have two sets of text frames after splitting that are nested in one block tag;

1066:1, **1066:2**, **1066:3 - 948:1, 948:2, 948:3**

You will need to alter the second set manually to read;

1066:1, **1066:2**, **1066:3, 1066:4, 1066:5, 1066:6**

Answer two: You can alternatively join the two sets of text frames in InDesign before splitting and the above will happen automatically.

What happens if there is an image in the block tag?

Answer one: You need to add the numerical sequence in the images script label. The only exception is that the image cannot be the first or last in the sequence. Our processor will then know how to re-order the code in that sequence. So;

1066:1, **+ image + 1066:2**, **1066:3**

Will become;

1066:1, **1066:2**, **1066:3, 1066:4** …where 1066:2 is the image script label and 2 changes to 3 and 3 changes to 4.

IDML>iXBRL

IDML export best practice

Export early and often

We recommend you export your IDML package early in your reporting process and do this often. We recommend this because:

- You become familiar with the process to save stress later on near filing
- You can check your design by opening it in the browser - does it look as you intended?
- You can check your design in the online viewer - how does it look?
- Check early so you have time to tweak your design if necessary.

The InDesign package

When first uploading IDML, it is always best to create a package that includes the fonts. It will also show over set text and other useful information about your file. Subsequent IDML can be exported with *Apple or Ctrl e* and the IDML file replaced in the original package. The Workiva platform only needs IDML and the fonts being uploaded to create XHTML.
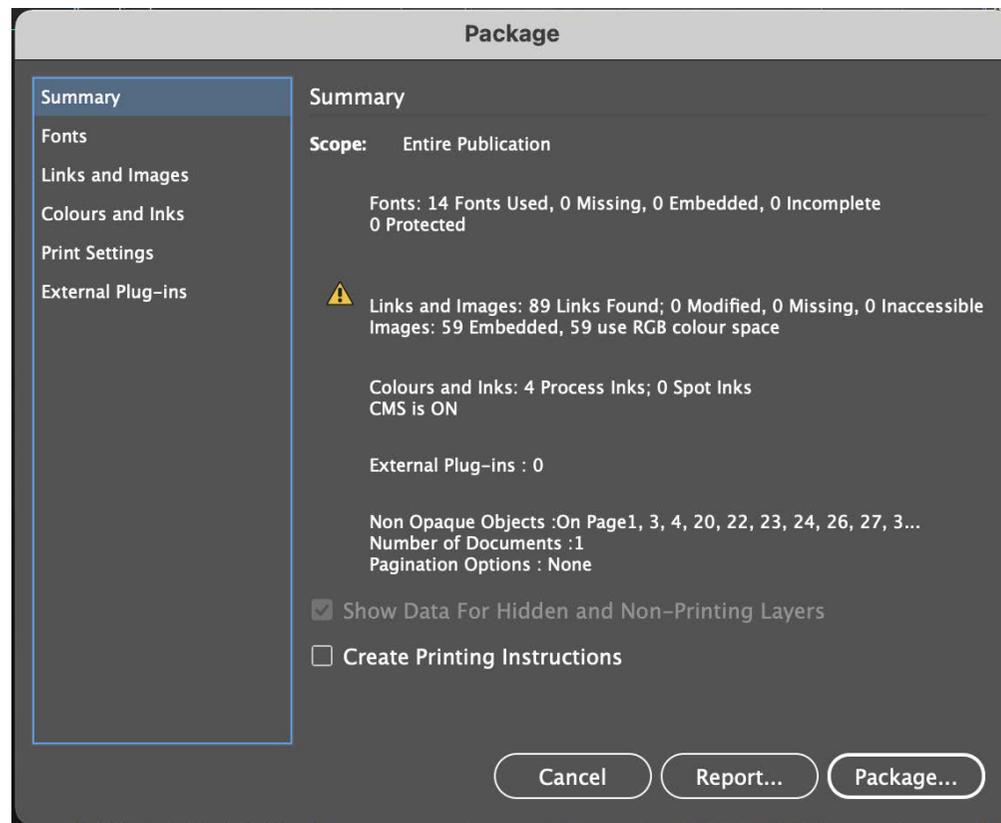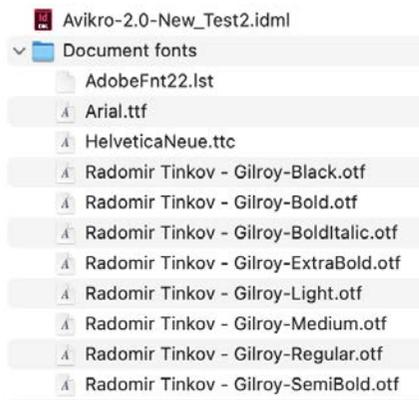
The package panel from InDesign

IDML>iXBRL

Converting your file

Once you have your zip or IDML file go to the Creation button in your Workiva workspace and click Import. You will then get an Upload panel where you can navigate to your zip or IDML file.
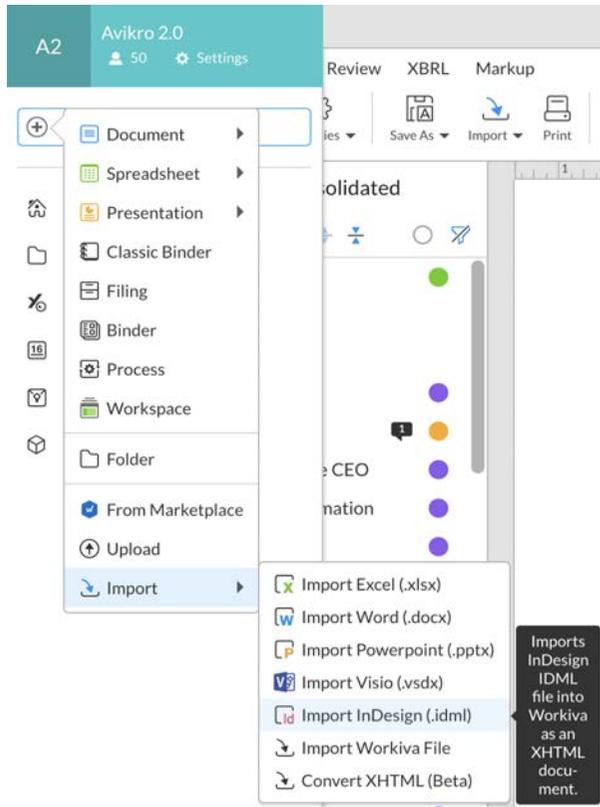
Where does my converted IDML file go?

It will sit on top of your files list along with the discrepancy report. The IDML file is not kept.
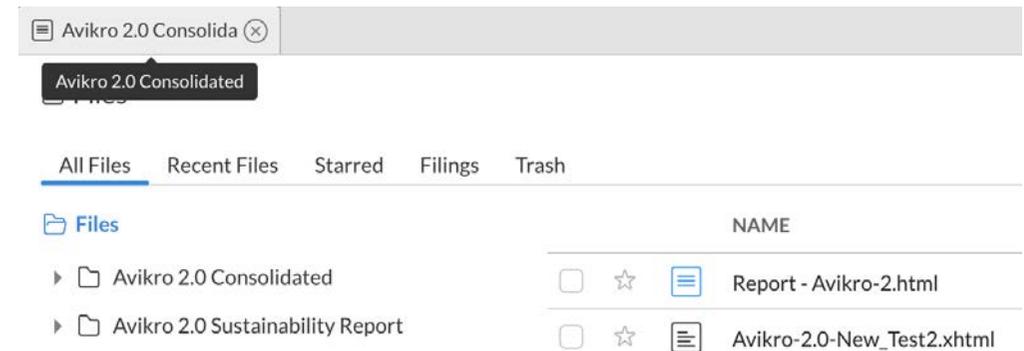
Discrepancy report

The discrepancy report will sit alongside your XHTML file with the appendage of 'Report' in the name. This file gives you information about your conversion and will highlight issues, if they are present. Designers are encouraged to view this report after conversion.

Top tip: If you cannot see your discrepancy report then clicking twice on the 'Last modified' filter, to the right of where the filenames are, will refresh the list.

IDML>iXBRL

How to create an iXBRL file from my converted IDML

You will need to ensure you have access to the XBRL tab in your workspace.
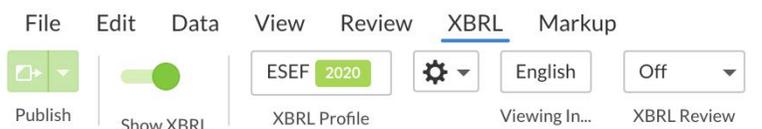
Click on the XBRL profile and then the documents tab. It is here you "override" the default XHTML with your converted XHTML.
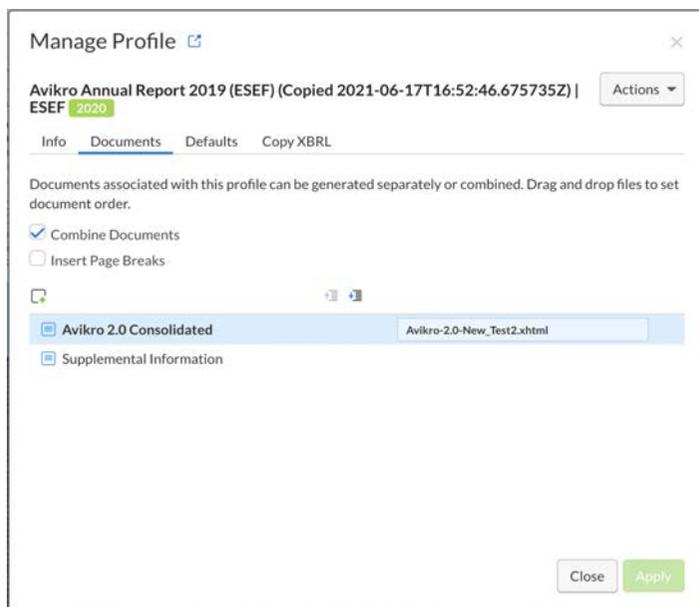
The left-hand side represents the documents on platform. The right-hand side the XHTML documents used to replace them. Clicking on the right-hand side will open a panel. Choose "Override XHTML" and your newly converted XHTML file will be on top (usually) of the file structure. Select that file. That's it!

Multiple InDesign files

The override works as a 1 to 1 paradigm. If you have multiple InDesign files that are overriding a single Workiva document then you will need to create blank Workiva files as placeholders. You can add multiple documents on the left-hand side as well.

You can now create an iXBRL file by clicking "Generate iXBRL" then "Full Generation" in the ribbon at the top of the Workspace.

A panel will appear on the right-hand side from which you can download you iXBRL package with the viewer for placement on corporate website or just the filing documents without the viewer for the regulator.

IDML>iXBRL

IDML>iXBRL checklist

1. Save a copy of your master document first and use this copy to prepare for IDML export
2. Ungroup all InDesign grouped items via the Workiva Integration plugin.
3. Unlink all ICML files. This can be done in the links panel.
4. Split all connected text frames using the split story button within the Workiva Integration Plugin - **as of 2023 do not use the split story script built into InDesign**
5. Remove any hidden layers or layers used for admin purposes.
6. All images to be placed at 72, 96dpi (144dpi can be used in exceptional circumstances), RGB and cropped to the image frame. This will reduce the file size dramatically.
7. Use SVG only for resolution-less vector graphics, not .eps or .ai files.
8. Make sure there is no overmatter.
9. Make sure tabs have not been used. Please limit any overrides to a minimum.
10. When uploading IDML it is best to first create an InDesign package so you can upload any fonts not on the platform as well. You do not need to upload the .indd file. You only need the IDML file and the fonts as a single zip file.
11. Make sure you can access XBRL in your workspace
12. Liaise with your XBRL experts to ascertain the status of the tagging
13. Open your XBRL profile panel
14. Override the default Workiva XHTML with your converted XHTML
15. Create iXBRL
16. Download iXBRL package for viewing locally - with or without viewer

A page being viewed in an **iXBRL viewer**

How to build an iXBRL file in the XBRL profiler

File size

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

How do you stop a filing or download nightmare? How can you reduce the size of your report? Read on for tips for designers can use to optimise their file size.

For the designer in InDesign

Here are things the designer needs to do to reduce the final file size in Adobe InDesign software:

- Avoid empty paragraphs to achieve extra space in your document.
- Make sure all content has a style name attached.
- 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 of your images are necessary.
- Make sure you have reduced your images to 72 dpi—the resolution for websites.
- Exporting as IDML and re-importing into the InDesign software at the end of your process can cut down the file size as it can clear out unnecessary code and get rid of third party plugins.

How to keep my XHTML file size down?

IDML export is a file size detox, but here are some other things you can do before exporting:

- Remove any unused objects
- Delete unused styles
- Delete anything left on paste boards or any extra master pages

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. IDML>XHTML also only places repeated images as an instance dramatically reducing file size.

Jurisdiction consideration - Find out your file size limit early and check that you are staying within this limit.

Extra Essentials

Shapes

Please be aware that we do not support all aspects of shapes. It is best to test aspects of your artwork so that the results can be assessed. Shapes can always be easily converted to SVG by exporting them from the InDesign software to Adobe Illustrator software and saving to SVG format from there. Then replace the shapes in the InDesign software with the SVG images.

It is best to use a placed SVG instead of multiple repeated InDesign shapes as this will reduce the file size significantly.

Be careful of copy and pasting assets within the InDesign software. It's always best to 'place' assets afresh each time even if they are the same asset.

Track changes

If there is non- Workiva content in the InDesign file, please ensure that all track changes are committed if being used.

Third party plugins

Please ensure these are removed or that the use of them does not interfere with Workiva's IDML to XHTML converter.

colors

Avoid colors too close. Gradients of colors from one to another must be avoided as at present this cannot be converted into XHTML.

Spreads

XHTML renders a page at a time so be careful with spreads. PDFs can be set to spreads to view but this is not the case with XHTML. You can add an XBRL viewer with your report and with input from your web team, you could add spread capability. This however is not available open source.

Margins

Mirrored margins have no place in a digital medium and are a 'print only' feature.

Tabs

Tabs do not exist in XHTML. Tabs must not be used for alignment when converting to XHTML.

Columns

ICML exports in galley format. This is a single measure, continuous column. It is placed in columns in the InDesign software. ICML does not export multiple columns.

In the Workiva platform, you can have a layout of up to 7 columns. However, for the ICML export to the InDesign software, column layout is not essential in the platform as the export sends content in galley (one column) format regardless of set up in Workiva. The designer takes the content and populates the columns in the InDesign software. The design from the InDesign document will create the XHTML, not the design in the Workiva platform.

Alien content

For data assurance, the main report content is created in the Workiva platform and this remains linked to the InDesign software where the designer can design without accidentally adjusting the content. Workiva is the master document here. However not all content has to be in the Workiva platform. So when would extra content be added in the InDesign software?

Picture captions

If design is taking place in the InDesign software, images do not need to be added to the Workiva platform. Designers can add image captions as necessary. These must be styled and are not effected on subsequent ICML imports.

Headers and footers

These do not export from the Workiva platform, so these need to be created with InDesign master pages.

Tracking and kerning

The InDesign software renders only once, so what you see on screen is the exact placement of content. On the web, this is different. The web renders every time you launch that page so designers must be aware of the limitations of the web. Justified text for example can have different line endings depending on zoom or type of browser being used.

Typesetting

Typesetting takes place in the Workiva platform not in the InDesign software. In the Workiva platform, do 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 icon on your top ribbon. If words are not to be broken (like in a name) use a non-breaking space in between.

Go to Insert>Symbol>Special Characters>Nonbreaking Space.

Glossary

XHTML and InDesign compatibility

Definition of symbols

InDesign Compatible
These are features of InDesign software that are compatible with IDML> XHTML export

Warning
These are features will need careful consideration or application if to be rendered in XHTML

Avoid
These are features of InDesign software that are not compatible with IDML> XHTML export

Feature information
These are just InDesign features that have no bearing on XHTML

Please note that common shortcuts have been added but these may vary due to platform and version of the InDesign software. Shortcuts mentioned in this guide are for Macs.

workiva

A

B

Align
Window > Object & Layout > Align
This tool can align text boxes or images to left, right, horizontally and space items evenly.

Alignment
Alignment as a paragraph style - justified, centre, left or right.

Align to page alignment
This feature is not supported in the XHTML conversion process.

Anchoring
This is where something is attached to another object (i.e. a caption is anchored to the image). Move the image and the caption will follow automatically except for table cells. Please do not use anchored images within text. Placed images in table cells are automatically anchored and we do support that feature.

Please do not place grouped items in table cells. These cannot be rendered.

Anchor Point
Tools Panel > Anchor Point Tool
Gives control over the path of a stroke or shape to manually alter its direction or curves.

Asset Links
Window > Links
In the InDesign software, images are linked from the desktop. For IDML these images will need to be embedded. To do this right click the image in the Links Panel and click on Embed Link. The image is now a permanent feature of the file. Just to note embedded images is a requirement of ESEF and should be in base64.

Arrange
Window > Arrange
This allows you to order a selected item to the back or front of your document within the same layer. This is referred to as the z-index in web terminology.

Baseline Grid
Baseline grid is not supported in XHTML. If using a baseline grid designers need to push their paragraph styles as far as possible to replicate the effect.

Baseline Shift
Baseline is an invisible line where letters sit. Baseline shift moves text up or down from the baseline. Select text then Option/Shift up or down arrow.

Bleed
Bleed is a print function. The images which are required to go to the edge need to actually go over the edge and then be cropped by the printer. Our convertor will also crop.

Compatible   Avoid   Warning   Info

workiva

B

C

Book
File > New > Book
The InDesign book format is a collection of InDesign documents that share the same format and can be numbered sequentially. A book can have multiple documents. We do not support the InDesign book format. The XBRL profiler stitches together multiple conversions.

Bodytext
The only Paragraph style that gets updated each time with ICML is called 'Bodytext'. Precisely spelled this way. This is because it is used to replace the 'Normal' default style. All other style names from the Workiva platform will NOT update the InDesign styles once they are there.

Clipping mask
This is a shape (container) and an image (filling). We only support a single object, image or shape within the clipping mask. We do not support grouped items having a clipping mask applied to them.

Comments
Clients/designers should use the Comment Function in the Workiva platform and not leave comments in the text. At this moment there is no way to pass comments to the InDesign software.

Colors
Workiva uses RGB colors for web usage. For IDML export RGB colors only.

Top tip: Consider all screen resolutions. Not enough color contrast limits web accessibility for some users

Character Styles
Character styles are exported via ICML and we support character styles in IDML> XHTML conversion.

Columns
The Workiva platform can support multiple column layout up to seven of like width. However, the content from ICML export is only one column by default (galley). This can populate many columns in the InDesign software. The InDesign layout will prevail in the XHTML.

Corners (Rounded)
Object > Corner Options
This will change the corner size and shape. These are called Squarcles. We support rounded corners in IDML>XHTML.

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D

E

F

Drop Cap
This typographic effect is used a great deal in print and not so much in XHTML. The drop cap can be across multiple lines with one or multiple characters at the start of a paragraph. We have limited support for drop caps so please test thoroughly. The workaround advised is to add an image for the drop cap.

Drop Shadow
This effect is not supported in IDML and should be avoided.

Descender
A descender letter is a letter that falls under the baseline for example 'y'. The tail of 'y' is a descender.

Effects
Object > Effects
Only transparency is supported. Gradients are not supported.

Ellipse Tool
Use this tool to create oval (elliptical) or circle (by holding down Shift) which are then ready for color and/or text.

Ellipse Frame Tool
This is used for creating a frame to place an image into.

Export
Export to IDML format for XHTML conversion.

Fonts
The first thing to check is that your client has web usage rights to all the fonts used in the report. It is advised that the licensing agreement contains a web font license. Any font (TTF or OTF) can be used because the IDML>XHTML will consume and convert uploaded fonts. Please make sure they are included in the IDML export.

Wingdings or Zapf Dingbats should be used with care and tested in XHTML.

Facing Pages
Created in the InDesign software for print layouts. Pages in the XHTML output will be displayed in order but in single pages only. The iXBRL reader can be developed to display spreads however.

Fill
Shortcut X
For this tool you set a color and fill a frame.

Top tip: Subtle variants don't show on all screens

For ESEF, fonts need to be embedded in the file as base64 code.

Top tip: Consider open source fonts for licensing and web suitability

Compatible   Avoid   Warning   Info

workiva

G

Glyphs
Window > Type & Tables > Glyph
A glyph is a letter/symbol making up a font. This palette will show all the available glyphs in the selected font. IDML will convert these symbols to code (e.g. @ = @).

Gap Tool
Shortcut U
This changes the size of objects but maintains the gap between them.

Gradients
A gradient is a flowing blend between one color and another or from one tint to another tint of the same color. We cannot accurately convert InDesign gradients to XHTML.

Gradient Feather Tool
Shift G
This tool allows you to fade an object/shape from opaque to transparent. Point to be aware of is that subtle gradients do not show up on the web due to screen resolution.

Gradient Swatch Tool
Shortcut G
You can adjust your gradient here.

Grids - Baseline Grid
View > Extras > Show Baseline Grid
The baseline grid is a framework that is used to align text. It is only shown in the printable area. It is not supported in IDML>XHTML.

Grids - Document Grid
View > Extras > Show Document Grid
This grid extends to the non-printable area around the page (the pasteboard) so that attributes can be stored for later use.

Group
Object > Group / Ungroup
The Group tool collects any item in the InDesign software and maintains XY coordinates when moving or rotating the group. XHTML does not support grouped items therefore you are required to ungroup all grouped items before conversion.

Guides
Layout > Create Guides
You can manually drag guides from the ruler bar. This is used to create individual guides rather than the document grid.

Compatible   Avoid   Warning   Info

H

I

K

Hand Tool
Shortcut H
This tool is used to grab the actual document and move around in your screen view between the pages or spreads.

Hyphenate
Located in the Paragraph panel
If you tick the hyphenate option in a paragraph style, it allows words to break at the end of the line across to the new line automatically. This is an InDesign function and is partially supported in XHTML conversion.

In certain languages the management of hyphenation is very important. It is advised that designers who are using those languages test thoroughly the IDML>XHTML convertor to make sure they get the effects that they want.

Hierarchical Styles
We support inheritancy (based on) in style pallets, paragraph, character and cell.

Info
Window > Info
Highlight text and then click window>info and it displays how many paragraphs, lines, words and characters. This is a good tool for clients to know how many words they need to fill a text area.

Intent
File > New Document > Intent
This is where you can set the intent of the document (e.g. print, web or mobile). This creates page sizes suitable for the use or platform. On newer versions web and mobile are tabs where you can set the size. For ESEF, the report is shown in a pdf style format so the web or mobile page setup is not necessary.

Kerning
Character palette or Command T
This is where you can increase or decrease the space between individual characters. Kerning can be set in the InDesign software only. There is a word spacing function in the platform but this is not exported in ICML. It is unclear as yet as to how far we will go to support kerning in IDML to XHTML. It is certain that we will support it as part of a style and is certain that we will not support it as an override. This means that designers who break the ICML link to use kerning techniques for widow management cannot do this anymore.

Compatible   Avoid   Warning   Info

L

Leading/Line Feed
Leading is the space vertically between lines of type. It is measured from one baseline to the next. The InDesign default is 120%. You can change leading in the InDesign paragraph styles panel.

Layers
Window > Layers
Layers help organise a document. The visibility of each layer can be turned on or off. You can lock a layer to prevent items on that layer from being selected. It is often used by designers when coming up with design visuals for clients. Layers can also be used for comments. Delete all hidden layers and layers used for admin purposes.

Top tip: Please remove hidden layers before conversion to XHTML

Line Numbers
Some designers add line numbers as a development feature in the InDesign software often on a hidden layer. Designers should delete these before IDML creation.

Line Tool
**Shortcut **
This creates a single line. It can be edited in the Stroke panel (window>stroke) i.e. weight, color, etc.

Holding down the shift key keeps the line vertical or horizontal.

Links (Assets)
Window > Links
In the InDesign software, images are linked from the desktop folder. For IDML these images will need to be embedded. To do this right click the image in the link panel and click on Embed Link. The image is now a permanent feature of the file.

Liquid Layout
Window > Interactive > Liquid Layout
This allows for different page sizes across your document and must not be used for IDML export.

Lists
The InDesign software only supports 6 levels of lists whereas the Workiva platform supports more.

Many designers are moving away from encapsulated lists. If you need to use more than 6 levels, just create the right number of paragraph styles with the appropriate indent and space above/below.

Lock
Object > Lock
This locks elements so that you cannot accidentally move them. Designers must unlock before export.

| | Compatible | | Avoid | | Warning | | Info |

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M   N   O

Margins
Layout > Margins and Columns
With a new document use this function on your master page and this will be set throughout the document. Click on each page if you want to adjust the pages later on.

Markers
Type > Insert Special Character > Markers (Page numbering)
Here you need to create a text frame then click on markers. If this is done on the master document, it will appear on all pages that have been created from the master page. We support page numbers but do not support text variables.

Master Pages
Window > Pages
Master pages are simply templates set up with common attributes e.g. headers and footers, page numbering, logo etc. You can create more masters (e.g. left and right-hand templates for spreads). You drag the master page into the Page panel to place those items.

Measure Tool
Shortcut K
This tool measures between two points and appears in the information bar.

Negative indents
Negative indents are not supported in XHTML.

Nested Styles
Far right of application bar > Drop Caps and Nested styles
A nested style is a style within a paragraph style. It will effectively override the paragraph style. This is not supported together with other style hierarchy.

Notes
Type > Notes
Here you can leave notes or comments for review.

Numbering & Section Options
Layout > Numbering & Section Options
When creating a large report, this helps with navigation.

The sections are shown in the thumbnails in the pages panel. We support automated page numbering.

Object
Top menu > Object
An object in the InDesign software is anything that can be edited ie text frame or image. With this drop down menu you can send the object to back or front, add effects like a drop shadow or transparency. We support limited attributes of object styles. Border, background and color.

Observed regions
The Workiva platform uses the concept of observed regions for a number of reasons including XBRL tagging. This is reflected in the InDesign software using the tagging panel and can be seen as multi-colored squared brackets around the ICML content. These brackets do not affect the design in any way.

When splitting a number of text frames, please do not split across an observed region, denoted by the square brackets shown below.

[open/.... split..../closed]

Compatible   Avoid   Warning   Info

P

Optical Margin Alignment

Top menu > Window > Type & Tables > Story
This tool will shift characters like speech marks to create a cleaner line. See example below. We do not support this.

Optical Margin example

"We have so asserted our station, both in the old time and in the modern time also," said the nephew, gloomily, "that I believe our name to be more detested than any name in France."

"We have so asserted our station, both in the old time and in the modern time also," said the nephew, gloomily, "that I believe our name to be more detested than any name in France."

Overprint

View > Overprint Preview
Spot colors are used when color accuracy is critical. This preview will show you more accurately how the colors will actually look in print. We do not support spot colors. They can be changed in the InDesign software in the color palette affecting the linked ICMLs.

Package

File > Package
This is used when sending the InDesign file to somebody else or good practice for your own information. This brings all the assets together into one folder.

Page Numbering

In the pages panel, double click master pages. Add a text frame large enough for your biggest number. Add a text frame to left and right master pages if applicable. Add text, if required, for example 'page' then position where you want the number to go then

Type > Insert Special Character > Markers > Current Page Number

By default, the numbering is 1,2,3 etc.

For different numbering - Layout > Numbering & Section Options

Pages Panel

Window > Pages
You can navigate through your pages using the Pages Panel. Here you can add more pages, delete or duplicate.

Page Tool

Shift P
This just changes the page size of one page in your document. It will not affect the other pages.

Paragraph Panel

Window > Type & Tables > Paragraph
This is used for individual paragraphs rather than using paragraph styles. We do not support overrides.

Paragraph Formatting Controls

Top Application Bar
This contains lots of style controls. Access by clicking on the 'A' which is top left. We do not support overrides.

Paste/paste into

Edit > Paste / Paste in Place
Please place all images. Do not cut and place multiples of an image. This includes pasting into shapes.

Compatible   Avoid   Warning   Info

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R

Pasteboard
View > Entire Pasteboard
The Pasteboard is the whole area including the area for non-printed content.

Pen Tool
Shortcut P
This creates custom lines.

Pencil Tool
Shortcut N
This creates lines as the pen tool but with more flexibility.

Place
File > Place
Images should always be placed rather than pasted. Images should be placed at 100% ideally for optimal file size. Images should also be fitted to the frame that they occupy. In other words, images should be cropped to the frame.

Plugins
All plugins should be disconnected before IDML export.

Polygon Tool
Tools Panel > Right Click > Polygon
This is supported. Please be careful about placing grouped items within a polygon as this will not be converted.

Preflight
Window > Output > Preflight
Preflight checks for errors before exporting and packaging in a zip file - things like missing files or fonts, low-resolution images and text overmatter.

Profiles
Edit > Assign Profiles
Here you can alter the colors of your document without converting colors (e.g. RGB to CMYK).

Top tip: Clear all pasteboard items for a quicker conversion

Rectangle Tool
Shortcut M
This creates a rectangle frame ready for text/color etc. Holding down the shift key creates a square. We support this as a text or image frame.

Relink
Window > Links or bottom of links panel
Images etc that have been renamed/moved can create an error and it is here where you can relink.

Revert
File > Revert
This goes back to the previous version of your document. Make sure that you have the current ICML.

Rotate Spread
View > Rotate Spread
This is only for working on your document. It does not alter print or IDML export.

Rotate Content
We support rotated content

Rulers
View > Show Rulers
Rulers can be dragged across from top down or left across.

| ✓ Compatible | ☹ Avoid | 🔔 Warning | ⓘ Info |

S

Scale Tool
Shortcut S
Grab the frame handle and resize.

Scissors Tool
Shortcut C
This cuts a frame or path.

Screen Mode
View > Screen Mode or W
This switches between normal editing mode and preview.

Separations
Window > Output > Separations Preview
This shows all the colors which are being used and can check when one color is being printed over another (e.g. knockout or overprint). This is an InDesign software only feature.

Shear Tool
Shortcut O/ Object > Transform
This changes shapes to create a more 3D effect by slanting an object. This is supported.

Slug
File > New Document > Bleed and Slug
Slug is a function not often used. It is used for leaving instructions outside the printed area and outside the Bleed area.

Split Story Script
For IDML export, do not split a bulleted item across text frames. The list can be in multiple frames but not an individual bullet.

Smooth Tool
Tools Panel > Under Pencil Tool drop-down menu
This removes/simplifies anchor points on shapes. When placing many shapes in a document, designers need to be aware of the number of points in a shape. It is best to optimise these for successful conversion and optimal file size.

Spreads
Please note that for IDML>XHTML, we process pages, page by page. iXBRL readers can display spreads although this will need some web development from your team. Please note that spreads over three pages cannot be used.

Stroke
Window > Stroke
With this panel, the appearance of lines can be altered.

Styles
Window > Styles
This should be used for setting Paragraph, Character and Cell. This is a time saver and should be used consistently across your whole document.

Please note that only the border and background of object styles are supported.

SVG
ESMA doesn't allow the <object> tag or <svg> tag so inline presentation is not allowed as we can't read the fonts.

To ensure that the SVG file appears correctly, if embedded in a web page:

1. open the SVG file in an illustration program

2. convert all font characters to outline paths

3. re-export the SVG file and embed that file

Alternatively, you can use web fonts to ensure that the necessary fonts are available on the web server.

Swatches
Window > color > Swatches
This panel is your library of colors or tints. Once a color is applied, like paragraph styles, edits made to a color choice will change all instances of that color across the document.

Compatible   Avoid   Warning   Info

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T

Table Measurements

The Workiva platform measures tables in pixels. The InDesign software measures by default in points, but can also do mm, picas and other forms of measurements. To set the correct body text width in InDesign for your desired table width please set In Design units to pixels and therefore you have parity with the platform.

Table

Table tab in the top menu.
Here there are the usual features of the number of columns, rows including height and width. We do not support table overrides in any form for XHTML export.

Table Cells

Avoid putting a text frame within a table cell. We do not support this.

Text color - inherited

We do not support inherited text colors. This is a feature of the InDesign software often using rule above/below. Please specify an actual color from the color palette.

Text frames

Text within a NON-rectangular text frame will not be supported. Please only use rectangular text frames.

Tabs

Tabs must not be used. Ever!

Text Threads

View > Extras > Show Text Threads
Text threads show the text frames that are linked together to create one single flow of text. You can link a text frame by clicking on the square in the bottom right corner of the text box and then clicking again in the following text frame. All linked text frames must be split before conversion.

Text Wrap

Window > Text Wrap
This panel wraps text around images or shapes. We do not support this.

Tracking

Windows > Type and Tables > Character
This reduces or increases the spaces between characters in a sequence of text. This tracks everything back and adjusts the whitespace proportionally back. This can be done as part of character and paragraph but cannot be accepted as an override.

Transform

Object > Transform
Here you can flip horizontally or vertically, scale, rotate or shear. Shear is when you slant an object. If an image converts incorrectly please check any transform done in InDesign.

Type Tool

Shortcut T
This tool creates a text frame

Use the Type Tool to create a text frame (just click and drag) for inserting text or click once on an existing frame or shape to transform it into a text frame.

Type on a Path Tool

Shift T
First you need to use the Pen Tool to create a path. Then you click the Type of Path Tool, go over to your path and click just once where you want the text to start. You then type and your letters will follow the path.

Tabs do not exist on the web!

Compatible   Avoid   Warning   Info

U   V   W

Units & Increments

Preferences > Units & Increments
You can set your preferences here for measurements. Pixels are usually used for web design so this should be selected for parity with the Workiva platform.

Variables

Type > Text Variables
Text variables can be used within text and text frames. These changes are dependent on a number of factors. Pagination, section, dates, running headers are some ways in which they are used.

We will be discussing whether we will support some of these items in certain circumstances.

Wingdings

Not all browsers understand Wingdings, Webdings and Zapf Dingbats. Best to avoid. There is limited unicode support.

Workspace

Window > Workspace
Workspace controls what panels you have available on your screen. You can click back to 'Essentials' to tidy up your workspace.

Contacts

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Written and designed by the Design Centre of Excellence, Workiva

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Contacts

Support contacts

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

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A full list of our global support telephone numbers can be located here Or email our Support Team directly via support@workiva.com

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