Design & Build Style Guides & Linking

After completing the various discovery sessions, we segue to the design and build phases with the customer team. Generally the majority of time in a project, deployment is spent around both design and build activities as these generally involved refreshing and duplicating a sequence of steps to leverage and optimize the base template with some tailoring and customization of the customer's needs. As we engage on the design and build aspects of the report outputs ,this is a key phase to validate the early designs and the early staging and importing of content as well as customization or optimization of how to set things up within the Workiva platform. We recommend establishing the style guide example and how it can be edited by the customer and that this is based off of the customer files and also having separate sessions within the document as well as the data collections and report outputs that may be beyond those of just the published report as well as receiving a client sign off that they are in line with this point of view or perspective of setup and any continuing tasks will generally be to replicate the same design philosophy across the different topics. If there is a connection or external system integration, we also recommend that there is a data preview of defining the data that is live via connection matching that sample which a client should have provided in the earlier document requests, checklist. Linking is one of the key functionalities of the Workiva platform and we recommend that values be linked inclusive of dates, inclusive of performance tables, certain in text, linking of standardized text of paragraphs or maybe general disclosures that are replicated in different areas of the document.

There is more information around linking available at the Workiva support site where we recommend that both customers and deployment teams navigate in order to select and also designed the specific kinds of options that are good candidates for linking. Just because something can be linked doesn't mean it needs to be linked. We typically recommend creating and establishing links for data that's going to be refreshed over a period of time and for structures of columns and rows that generally remained the same from reporting period to reporting period. We do recommend that customers and teams inclusive their design and build phases, navigate and leverage the support site for these resources and documentation. Next, we'll segue to previewing some of the design elements and how things are set up within the Workiva inclusive of linking examples as well as style guide edits and updates and nomenclature allowing the customer to tailor and configure and any implementation team that would be walking through a deployment. We generally begin by first articulating if the report which should have already been defined within the discovery sessions, is going to be a skeletal build a partial or a full report that would be set up within the platform here we're taking a look at a sample, partial to full report that would have initially been provided by a customer via docx file. When a customer provides a docx file, we recommend importing that file directly to Workiva by going to file import or selecting the plus sign on the left, selecting, create and importing that word file. After that file has imported there may be certain kinds of adjustments that are needed or potential design preferences that can be fine tuned directly within the platform. Here we can navigate just like a regular text editor with full functionality and editability for additional insight into how spacing is being defined within a page. We recommend toggling the non printing characters as these will define where there are page breaks, paragraph breaks and as well as hard returns across set content.

We had previously previewed editing style guides and as shown here, if you are within the ribbon under edit and select edit style guide a new sub tab will open which will define the different kinds of style guides associated with that specific document and that specific report. If I select the normal style guide, this defines any default text section. You can also prevent changes as long as you are a document owner. Thereby an editor would be able to apply those changes for a style that's already been

predefined but would not be able to make changes if they are not a document owner and a lock was established. Let's go ahead and update are normal to a new text fund and for purposes of the example and potentially select slightly different saturation on the front color by selecting publish these changes would apply them to the document. If I do not wish to save these changes by discarding them, it would leave the document as previously defined. We'll now actually notice that our text font has changed as well as the shading and if I did want to update this as well to 12 point and published these changes as well any area within the document that has this style guide applied as we can notice here for the text normal we can quickly realize that this text has now been updated to the new font family, the new font size as well as a new font color.

And finally, we do want to highlight linking exercise where we have navigated to a specific section and we would like to bring over some content from data stage within the factbook. We'll notice here this is a destination link that is already providing the information for this description. Within the link, text we'll proceed to answer a table down below that will serve as the landing location for a newly to be created link. We'll navigate to our previously open factbook where we have some emissions by vocation information and will select a block of text and select copy. You can both copy by your right hand helper menu as well as by control copy within the keyboard. We'll see the selection here of the box confirming that this information is now within the clipboard and also liked a cell and paste that information into that table until that cell. It's important to select the blue clipboard so like create links from and we have a choice of either selecting cells with values only cells that are linked this would be a potentially linking directly from other destination links for purposes of this example will select all cells as this ensures that even cells that may be currently blank but perhaps we'll have a value in the future will already be linked and capable of updating that value. I will now format this accordingly by removing the column that I know is not linked as well as adjusting some of the layout and the formatting for the description. We'll notice that I did select in the blue clipboard to apply the formatting from the source destination and also data validation if applicable which allows some of the dropdown menus. I do have a free range to update and for this content as needed within the document included of justifying or potentially changing the background colors if they're better suited to the format of this document I'll remove and say that I'll remove that color there but furthermore we recommend for both design and build phases validating with the customer the process of updating data after it's been linked as an example if I wanted to perhaps select a different location information there may not yet be data populated but if I do select for purposes of the example, let's say Texas and I published this link information now anywhere that there is a destination link, this data will be updated and reflected as so.

Furthermore, if I wished to relay the same information, potentially within a presentation, I'll go ahead and copy this table that I've already set up as the destination links within the document and navigate to an investor's report here. We can see the general structure of investors report it has as an example and potentially some placeholder information, things that can start building the content that will be published similar manner. I'll answer at the table for that location breakout data just to serve as the location where I would like to pace my information I also liked once again create links from I also liked once again all cells. I'll keep apply formatting applied data validation are the default options for a clipboard unless I override those by selecting the default options and I'll design this to take over a bigger portion of the presentation slide as a closing thought we recommend highlighting to the customer as data comes in and we'll select back the state that had corresponding values you'll see these unpublished links bur now that these destination links have been established as we published the links. the data will reflect instantaneously to those destinations. Both the document and the investors report will highlight the newest and latest linked information as part of the destination links. Validating. linking structure is a key phase of design, as this will allow it to replicate the philosophy and linking best practices in the continued build of the ESG reports and solution.