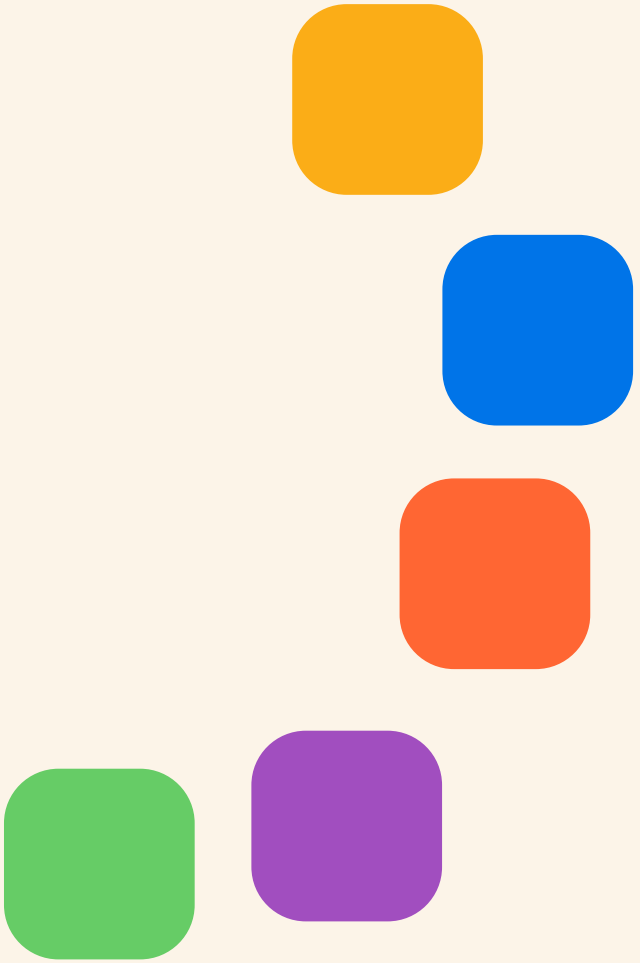
May 2021

Document Setup

Partner Enablement Guide



Workiva

Contents

2 Introduction

3. What does Workiva do?
4. Glossary Symbols

5 Document Requirements

8 Document Setup Approach

9. General Document Setup Approach
13. Design Reporting Document Setup Approach

18 Topics and Q&A

19. Document Outline
20. Footnotes
21. Graphs & Charts
22. Headers and Footers
24. Hyperlinks
25. Images
26. Layout
27. Margins and Page Breaks
28. Multiple Columns
29. Non-Printing Characters
31. Non-Printing Sections
32. Styles
33. Tables
34. Value Accuracy

36 Resources

37. General Resources
38. Design Reporting Resources

39 Contacts

Welcome to The Partner Enablement Guide!

Welcome to the first edition of The Partner Enablement Guide.

This guide will navigate you step by step to successfully build documents following our best practices. It will cover document requirements, setup approach and design Reporting considerations among other topics.

We have highlighted important items to consider and be aware of when setting up a document to ensure there are no surprises at the end of the build.

Furthermore, we have listed out some of the most *Frequently Asked Questions* from our experience which are not included in our customer facing articles.

We hope this guide will support you and will set you up for success.

Good luck!

What does Workiva actually do? 3

Workiva is a connected reporting and compliance platform focused on helping issuers streamline their reporting to the country regulators.

What are its benefits

- Reduces risk through linked data - the single source of truth
- Improves transparency - through a detailed audit trail of every change
- Saves time - reduces or eliminates manual repetitive tasks
- Easier review process - external auditors can be granted access
- Better informed - always the most current version
- Collaboration - work together with commenting and progress functionality from anywhere with internet access

Workiva for annual reporting

The master workbook within Wdesk is the single source of truth which is linked to automatically populate financial statements, narrative and footnotes. Any change, the master workbook is re-synced and the changes flow automatically throughout every component using that linked data.

Milestones can be created to show any two versions of the report perfect for audit review.

One living document - everyone can edit - no multiple files

Workiva and design

Workiva works with designers either within the Workiva platform or via export/import to InDesign. The benefits to designers is that there is only one version of the report with the best possible source of data integrity.

Welcome to Workiva!

Simplify complex work

Definition of Symbols

Information
Feature Information.

Avoid
Items that should be avoided.

Warning
Items that will need careful consideration.

5 Document Requirements

Document Requirements

6

Information to gather from the client prior the implementation

Timing of documents

When do they need the documents ready? Is there a priority? (order in which documents should be built).

Source documents

We require the source file documents to be in docx format in order to import them to WDesk.

Find out if the client will be exporting from Wdesk. Will they use InDesign (ICML) or export as Word/PDF? In this guide you will find two different document setup approaches depending on whether the type of export the client requires. For PDF or Word export, see the general Document Setup Approach. If the client will be using ICML export to later work in InDesign, please follow the Design Reporting Approach for ICML Export.

Document requirements

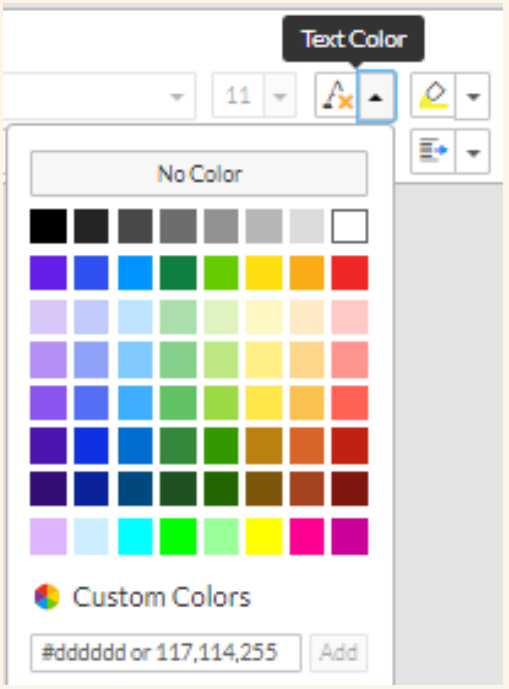
- **Design Reporting:** ask the client's design agency/ design team to provide a style sheet with the following information:
    - Page size, margins, columns (number and gap). - all in cm or inches.
    - Text and table styles, including: fonts & fonts size, paragraph spacing (before or after (in pts.) and/or line spacing (in percentages), indentations (cm/inch), alignment(left, center, right), font color.
    - Tables: table overall widths, row heights, column widths (in pts); line weights (in pts) & table shading.
    - Custom colors (HEX code) - Wdesk does not support transparencies.*
    - The client/design agency should also provide examples of how the styles are applied in the document(s).
- **Fonts:** check what font(s) the client uses in their documents. If they use a font that is not listed as available in Wdesk, send the customer the link to the "Supported Fonts" help article to see if a font on this list would be an acceptable alternative. If not, we might be able to bring the fonts into wdesk. You will need to find out details on the requested font from the customer, including:
    - Font name.
    - Styles requested (regular, light, bold, italic, condensed, etc).
    - Any licensing details (is it a custom font owned by that specific customer).
    - Purpose of the font.

Some things to keep in mind when you gather this information:

1. Not all font requests can be completed due to licensing restrictions. There could be licenses fees - the client might have to pay to have the fonts implemented.
2. Font implementation can take 4-6 weeks.

*** Colors:** you can add colors as you need under custom colors. Colors must be entered as RGB format or using a HEX code.

You can use a color picker tool such as the Instant eyedropper to obtain the HEX color codes.



8 Document Setup Approach

9. General Document Setup Approach
13. Design Reporting Document Setup Approach

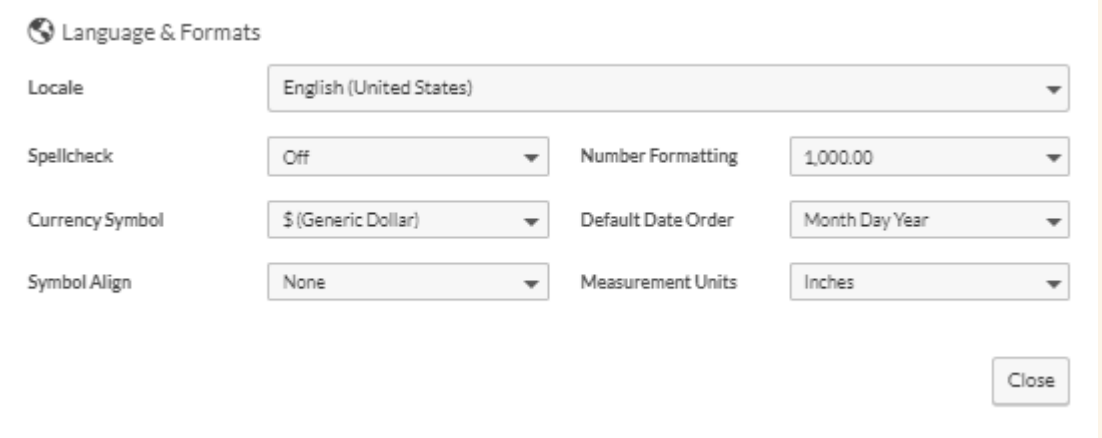
Document Setup Approach

9

Recommended steps

1. Import document into Wdesk.

2. Set Document Properties. — Remember to set the locale at this point. You can find a list of supported languages here.



3. Set Document Permissions.

4. Split the document into sections.

- Best practice is to follow the *Table of Contents*. It is also possible to hyperlink to sections within the document to the table of contents.
- You can also import a docx at the end of an existing Wdesk document. Please note that you cannot import new content in a specific section. Content will always be imported at the end of your document. If you want to add it to a specific section, simply copy-paste the content.
- Moving content to another section can be done by copy/cut, and paste.

5. Setting up a style guide in Wdesk.

What is a style guide?

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

Our recommendation is to build a Style Guide according to the styles used in the source files and apply the same margins, document size, etc as the source file.

Creating Styles

From the *Edit* toolbar, click the *Styles* menu. Select *Edit Style Guide* to open the *Style Guide Editor*. Then, to create a new style follow these steps:

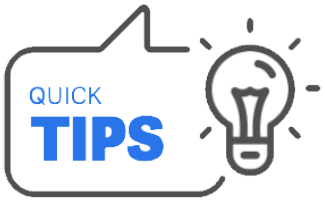
1. Click the *New Style* + icon.
2. Select Custom from the menu and name your style in the text box.
3. Click Add to add your new style. From here, you can edit the style using the settings in the right panel.

The Paragraph Styles editor has three main sections:

- ***Text*** lets you edit text settings like font type, size, color, emphasis, and alignment.
- ***Indentation*** includes first line and left indent (to be entered in inches or centimeters - this depends on your document properties).
- ***Spacing*** lets you adjust line spacing (you can choose single, double or enter your own percentage) and paragraph spacing (to be entered in pts).

4. Click Publish in the toolbar to save your changes.

   Note that if you use a style in your document and later change its attributes, those changes are automatically applied throughout the document.



If the Word document has already applied styles, these will be maintained after the import. To save yourself some time you can simply use these and update them as needed.

Best practices
Follow these best practices when creating the styles:

- Create the styles needed based on the original file.
- Use the best judgement to decide which attributes need to be locked. As a rule of thumb, font type should always be locked, but other attributes, such as indent, spacing or emphasis can be left unlocked. For example, Table Text can be used for both line items and values if only the alignment is different.
- If any of the text is white, consider making this text light gray in the Style Guide so it can be seen in the dropdown and in white pages. Page background colors are not supported.
- Use semantic naming conventions if planning on exporting to XHTML.

You can read more about styles under the Styles section of this document.

6. Formatting a document.

There are many useful articles on the Workiva Support Center explaining step by step how to create and edit documents, as well as tables, charts, spreadsheets and presentations. We have highlighted a number of important ones below to get you started.

Workiva Support Center → Using Workiva → Documents

- Paragraph Properties
- Page Breaks
- Create a table
- Use Outline Labels
- Revisions and History in Documents
- Hyperlink the table of contents and add page numbers so these are automatically updated when content changes in the document.
- Use the Format Painter to format table cells or text quicker in your Document as it allows you to copy and apply the format from text and cells. By single-clicking on the Painter button, you can apply a style to text once. A double- click of the Painter tool will make it possible to apply a style to multiple pieces of text.
- Create a split screen (side-by-side-view) to compare a spreadsheet and a document or even two documents. This is especially helpful when reviewing and linking or working with two documents in different languages.

7. Add headers and footers.

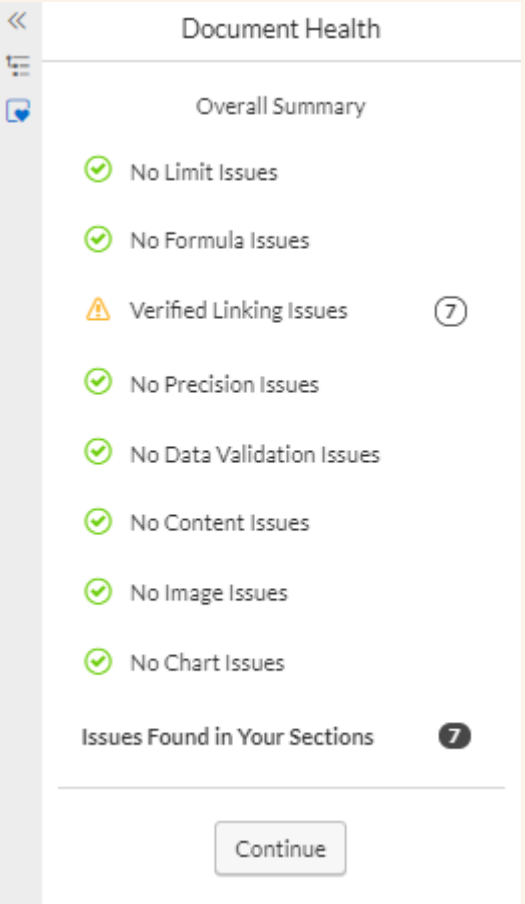
8. Link tables, dates and/or in-text values (if applicable).

- Linking and Publishing in Documents
- Supported Formulas
- Spreadsheet Templates
- Format Values and Numbers

9. Review the document.

10. Run a document health check.

We recommend using this function after a document setup has been completed. The document health checks for issues such as broken links, truncated cells or missing images.



Exporting the document

When you are ready to export your document, go to "Save as" and choose PDF or DOCX from the export options.

You can then select the options you want to include in the exported document.

Document Setup Approach for Design Reporting

Recommended steps for a smooth ICML export

1. Import document into Wdesk.

2. Set Document Properties. — Remember to set the locale at this point. You can find a list of supported languages here.

3. Set Document Permissions.

4. Split the document into sections.

- Best practice is to follow the *Table of Contents*. It is also possible to hyperlink to sections within the document to the table of contents.
- You can also import a docx at the end of an existing Wdesk document. Please note that you cannot import new content in a specific section. Content will always be imported at the end of your document. If you want to add it to a specific section, simply copy-paste the content.
- Moving content to another section can be done by copy/cut, and paste.

Section outline naming

- Windows users: ensure the section names are not too long as Windows has a maximum number of 260 characters in the whole file path which is how it gets saved.
- Avoid using accents in section names, which are heavily used in the French and Spanish language for example. It will cause ICML export errors.
- Make sure the section name does not begin with an (accidental) space. It will create an underscore upon export.

5. Setting up a style guide in Wdesk.

Creating Styles

From the *Edit* toolbar, click the *Styles* menu. Select *Edit Style Guide* to open the *Style Guide Editor*. Then, to create a new style follow these steps:

1. Click the *New Style* + icon.
2. Select Custom from the menu and name your style in the text box.
3. Click Add to add your new style. From here, you can edit the style using the settings in the right panel.

The Paragraph Styles editor has three main sections:

- ***Text*** lets you edit text settings like font type, size, color, emphasis, and alignment.
- ***Indentation*** includes first line and left indent (to be entered in inches or centimeters - this depends on your document properties).
- ***Spacing*** lets you adjust line spacing (you can choose single, double or enter your own percentage) and paragraph spacing (to be entered in pts).

4. Click Publish in the toolbar to save your changes.

   Note that if you use a style in your document and later change its attributes, those changes are automatically applied throughout the document.

If the Word document has already applied styles, these will be maintained after the import. To save yourself some time you can simply use these and update them as needed.

Best practices for creating and using style guides

- Styles should be applied to all text. Never use the "Normal" style for text or tables. Instead, create a new style, i.e. BodyText, and apply to all normal text. Consider turning “Normal” styles to a bright color (for example pink) to easily identify it in text and tables.
- If it is a very unique style, consider adding a note when it should be used. However, normally this should be evident in the Style sheet.
- Style names should be alphanumeric, have no spaces and start with a letter not a number. Characters such as - !@#$%^&*()_+-={}:”<>?[];’,./`~ etc. should not be used.
- Lock attributes to prevent changes: it is preferred for every style in the text to have its own custom style. So for example, in tables, rather than manually updating alignment you can create two styles: TableTextLeft (with left alignment — used for line items) and TableTextRight (with right alignment — used for values).
- Consider creating bullets styles and locking the indentation in the Style Guide for consistency purposes. If there is more than one level of bullet lists, you can create a bullet style for each level.
- Background colors are not supported. As a result of this, if the text is white consider making it light gray in the Style Guide so it can be seen in the dropdown and in the text.
- Create all styles in Wdesk. Designers can create styles in Wdesk for both Wdesk content and non-Wdesk content such as picture captions, running headers, page tabs, etc.

  You can read more about styles under the Styles section of this document.

Working with Style Guides for Wdesk and InDesign

The design agency can provide a style sheet with colors, styles, fonts, etc. Wdesk styles do not need to be 100% match to those in InDesign. After the ICML export from Workiva, the style attributes can be changed in InDesign.

ICML vs IDML

ICML contains one file per story. It is not a complete document. Upon exporting from Wdesk you will get an ICML file per Wdesk section.

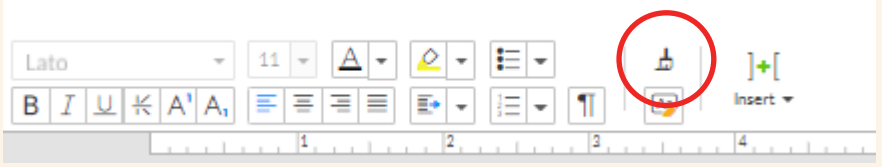
IDML represents the full document.

6. Formatting a document.

There are many useful articles on the Workiva Support Center explaining step by step how to create and edit documents, as well as tables, charts, spreadsheets and presentations. We have highlighted a number of important ones below to get you started.

Workiva Support Center → Using Workiva → Documents

- Paragraph Properties
- Page Breaks
- Create a table
- Use Outline Labels
- Revisions and History in Documents
- Hyperlink the table of contents and add page numbers so these are automatically updated when content changes in the document.
- Use the Format Painter to format table cells or text quicker in your Document as it allows you to copy and apply the format from text and cells. By single-clicking on the Painter button, you can apply a style to text once. A double- click of the Painter tool will make it possible to apply a style to multiple pieces of text.



- Create a split screen (side-by-side-view) to compare a spreadsheet and a document or even two documents. This is especially helpful when reviewing and linking or working with two documents in different languages.

7. Add headers and footers.

8. Link tables, dates and/or in-text values (if applicable).

- Linking and Publishing in Documents
- Supported Formulas
- Spreadsheet Templates
- Format Values and Numbers

9. Review the document.

- Make sure all content has a style applied and nothing has been left as “Normal”.
- Review any unnecessary styles from the style guide, such as styles that might have been generated during import.

10. Run a document health check.

We recommend using this function after a document setup has been completed. The document health checks for issues such as broken links, truncated cells or missing images.

Exporting the document

When you are ready to export your document, go to "Save as" and choose ICML from the export options. You can export the entire document or some sections.

18 Topics and Q&A

19. Document Outline
20. Footnotes
21. Graphs & Charts
22. Headers and Footers
24. Hyperlinks
25. Images
26. Layout
27. Margins and Page Breaks
28. Multiple Columns
29. Non-Printing Characters
31. Non-Printing Sections
32. Styles
33. Tables
34. Value Accuracy

Document Outline

The Document Outline provides an overview of how sections are organized. From the outline, you can create, rename, and delete sections, as well as reorder the document's hierarchy.

You can select and move multiple sections at the same time. Select the sections you want to move by holding down shift and clicking on the sections. Then, drop them in their new spot.

"Split to New Section"

This is a new feature which allows you to split an already existing section into two or more separate sections. It removes the need to copy and paste paragraphs into newly created empty sections. Simply place the cursor where you want the new section to begin, right-click and select "Split to New Section". The part after the cursor will become a new section which can then be renamed.

See more Document Outline Tips.

Footnotes

You can use Wdesk automated footnotes. To learn how to create footnotes in Wdesk, please refer to this article.

If you're exporting to ICML, footnotes will export as a separate ICML file within the section folder. Footnotes then can be placed in your document in InDesign.

Footnotes in tables

When you click in the cell or on the cell, the insert footnote at the top disappears. You have to get here by right-clicking on the cell to open a small menu which allows you to insert a footnote again.

Note that the footnote number will be added after the last word in the cell.

Graphs and Charts

Graphs and charts can be saved as images. To do so, first select the chart, then right-click to access menu options and click PNG or JPG.

If exporting the document as ICML, graphs and charts will export as .svg files and inherit the same name as the section where they were built in Wdesk. For example, if there are two charts in the section Key Figures, these will export as *keyfigures1.svg* and *keyfigures2.svg*.

Our Support Center accounts with many articles and how-to-videos around creating and editing charts.

Headers and Footers

22

You can add text, tables or images to headers and footers. These appear above and below the gray dashed line at the top and bottom of your document.

Once you click on the header or footer area you will see a properties panel pop up on the right side.

You can create a header or footer and use it in subsequent sections, applying the *"Inherit from previous section"* option from the *Properties* panel in the following sections. Using this option will allow the section to use the same header or footer as the previous section. When you tick this box, you will see underneath the name of the section from which the header/footer is being inherited from.

You can also create different headers within the same section. There are three options under the *Properties* panel:

- **Alternating pages:** odd-numbered pages use one header, while even-numbered pages use a different header.
- **Different first page**: the first page of the section uses a different header than following pages. If alternating headers are also applied, they'll begin after the first page of the section.
- **Different last page**: the last page of the section uses a different header than previous pages. If alternating headers are also applied, they'll end before the last page of the section.

Read more about headers and footers in these helpful articles:

Add Headers and Footers

For creating headers/footers, properties, size, margins, adding page numbers.

Insert Header and Footer Content

For adding table rows, hyperlinks, links and images.

Headers and Footers

Troubleshooting

"The header disappeared. How do I get the header back?"

Or...

"My header/footer is showing the wrong content."

Headers and footers are set on section level, so if a header/footer disappears or is showing incorrect content, it is very likely that...

a. The boxes under properties have been incorrectly selected, and/or

b. The section is simply just inheriting the content from a different section than the one you want.

The header/footer will always be inherited from the previous section, so check that the header/footer of that section is correct. You can find out the name of the section from which the header/footer is being inherited from by looking at the *Properties* panel.

Sometimes when several sections fall into the same page, they do not inherit the header/footer correctly. Remember that you will only be seeing the header of the first section that fall into that page and the footer of the last section. You will want to review which header/footer has been applied to each section within that page. To do so, insert a section break before each section and look at the content and properties of the header/footer, making sure the correct boxes have been ticked.

ICML: headers and footers do not export.

Hyperlinks

"After applying the style, the text still looks as a hyperlink (blue and underlined). What is the best way to handle hyperlinked text that requires a style?"

Hyperlinked text does not take a style with locked attributes. Create a “Hyperlink style” in the styleguide and do not lock color and emphasis. Overwrite these attributes in the document.

ICML export: The overwritten style will export as a new style in InDesign.

"I have moved some sections but the TOC does not change. When shuffling in the TOC the page numbers do not update. How do linked page numbers work?"

See this article on the Workiva Support Center for a step by step explanation and other useful information: Create a Table of Contents.

Please note that the table of contents does not update automatically with changes to the document outline are made. If you change the order of your sections, you'll need to manually update the order in the table of contents.

"Are external hyperlinks allowed with ESEF?"

No.

"Do external hyperlinks export with ICML?"

Yes.

However, internal hyperlinks, such as a hyperlink to a section within the document, do not export.

Images

If exporting to ICML, images export as .png files. They will be named as image, and numbered depending on the number of images present in the section. However, it is better to add your own images directly in InDesign for better quality.

Images in tables

You can insert images to a table cell from the Edit toolbar. You will find the option under the Insert dropdown.

Images must be in GIF or JPG format.

SEC Image Requirements

Before filing with the SEC, make sure image files in your filing documents meet SEC requirements and restrictions. Only .gif and .jpg file formats are supported. The EDGAR Filer Manual states, "EDGAR will suspend any submission that contains a non-GIF/JPG reference."

Please make sure to read all SEC image requirements before submitting your filling.

Layout

"How can I insert an image or create a certain layout with a table that fills the entire page?"

Make sure that page is in its own separate section and set all margins to zero. If working with an image, you will be able to resize it from the “Image Properties” panel on the right. Please note that Wdesk Documents don’t support full bleed.

"Can I add text on top of an image?"

Currently, this is not possible in documents. If you are creating a cover page, consider doing this in a presentation. You can later export it and add it to your document as an image.

"Can I create a more complex layout?"

Up until an extent you can create certain layouts using multiple columns. However, if you are unable to achieve a specific layout using columns, you can always try with tables.

Create a table and arrange your rows and columns in a way that you can achieve a more dynamic layout by placing your paragraphs in those rows and columns. You can also create a text block with background or an image next to your paragraph by placing it in a table. If you need several of the same layouts you can simply copy the table and paste multiple times to then replace the content. That would be the easiest and quickest way.

Try to minimize the number of rows or columns to keep things easy to edit when merging certain cells.

If you have a big horizontal spread or two-page layout, you can build your document as single vertical pages or as horizontal pages. For example if a vertical page is size A4, the horizontal page should be an A3.

"How should I handle diagrams or big spreads in Wdesk? Is it best to bring in the content or add an image as a placeholder?"

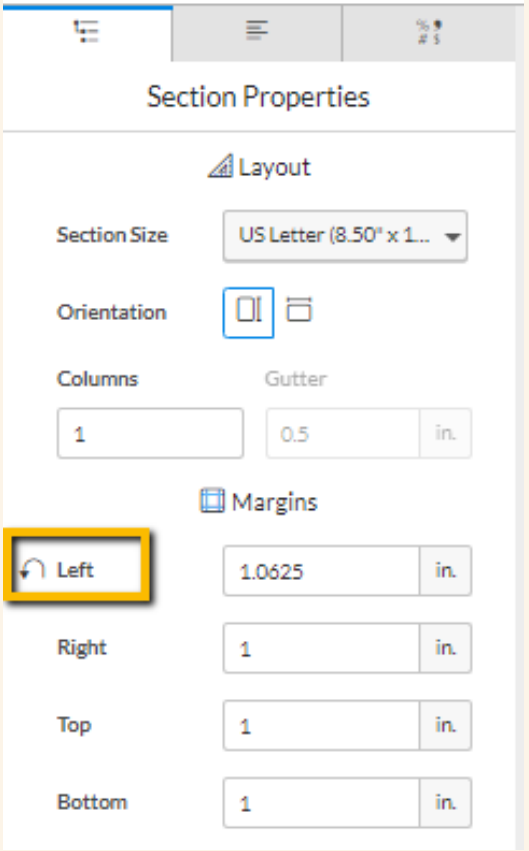
Our best practice is to bring in the content as text. Designers will be able to arrange it as they like in the page and create the spread in InDesign.

Margins and Page Breaks

Margins are managed from the Document Properties panel and are defined for the entire document. However, margins can always be overwritten for a section *(see Section Properties)*.

What is a Margin Page Break and how to remove it.
Margin page breaks occur when two consecutive sections have different margins. Different section margins require a page break. To remove the page break, adjust the margins under "Section Properties" or reset them to default style. The default style is set at a document level.

Read more here: Page Breaks vs Section Breaks



Exporting to ICML

Page margins can be set in InDesign and do not need to match those in Wdesk. However, consider how tables have been created in the document (for instance, do they stretch from margin to margin?), as table size cannot be modified in InDesign due to a limitation of how ICML works. See more information about this limitation under the tables section.

"How should designers manage the breaks? In order to keep everything linked with Wdesk but at the same time to be able to manage the layout of the text in InDesign."

Page breaks or column breaks do not export to ICML, so having them in Wdesk will not affect the layout in InDesign. Content can be placed in multiple chained text frames to create columns or any sort of layout. If you are using hard returns to create breaks and try to add or remove them in InDesign, you will receive a message that asks you if you want to check out the content. You cannot delete any content without checking the ICML out. And if you do so, all changes will be lost after re-linking the ICML.

Multiple Columns

Columns can be set at different levels in a document. Define your columns for the entire document under:
"Document Properties > Page Format > Page Layout".

Columns can also be overwritten per section under *Section Properties*, or even per paragraph, allowing you to have a different number of columns within a same page or section. This option can be found under *Paragraph Properties*.

What is a Column Gutter?
The gutter is the space between columns. You can control the distance between two columns by increasing or decreasing the gutter size under *Section Properties*. This space can also be set per paragraph under *Paragraph Properties*. Please note that paragraph properties will override section properties. If the size of the gutter column is different between paragraphs within the same section/page, columns will not follow properly.

Troubleshooting for documents with multiple columns

- If columns are not following correctly, select all columns (preferably the entire page) and re-set paragraph properties to make sure all columns have the same column number as well as the same gutter size.
- Hard returns can sometimes create an unwanted gap between columns or affect the column flow. Turn on non-printing characters to see whether any hard returns have different paragraph properties.
- Besides column breaks and page breaks to control the position of the paragraphs, you can also create gaps between columns and modify their position with the aid of hard returns. However, please consider not using hard returns if exporting to ICML. You can read more about this under the styles section.
- If the section uses different columns (sometimes 1, sometimes 2, 3 etc.), make sure to have the section properties at 1 column, and work with paragraph properties to override to 2/3/4. Paragraph properties will take precedence over section properties.
- Watch out for *hard returns* at the end of a page.

Read more about working with multiple columns: Multiple Columns.

Multiple columns do not export to ICML. Content will come as running text.

Non-Printing Characters

Hard Returns

Press the “Enter” key.

How to add a *hard return* or new bullets In tables:

Press “Alt + Enter” or “Ctrl + Enter”

Soft Returns

Press “Alt + Enter” or “Ctrl + Enter”

"What is the difference between a *hard return* and a *soft return*?"

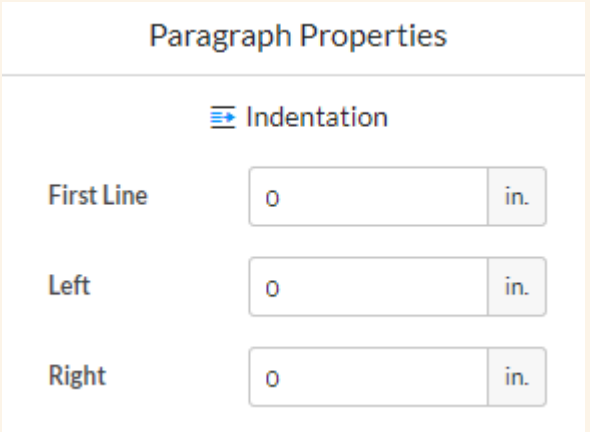
A hard return forces the following text to start in a new paragraph whereas a soft return simply moves the following text to a new line. This creates a line break within the paragraph.

Note that with a soft return, the spacing before a paragraph is not maintained (even when the spacing of that style is locked) as you are still within the same paragraph.

Avoid hard returns if using ICML export. They will generate a new *Parastyle* in InDesign if there is no style applied to them.

Tabs

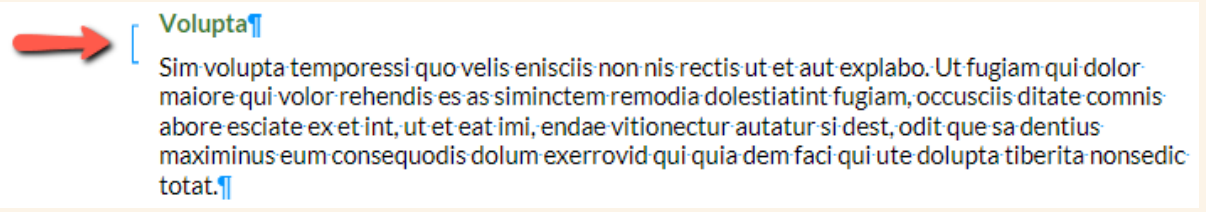
Do not use tabs if exporting to ICML or XHTML. Instead, add indentation to the style and work with numbered and bulleted lists.



Non-Printing Characters

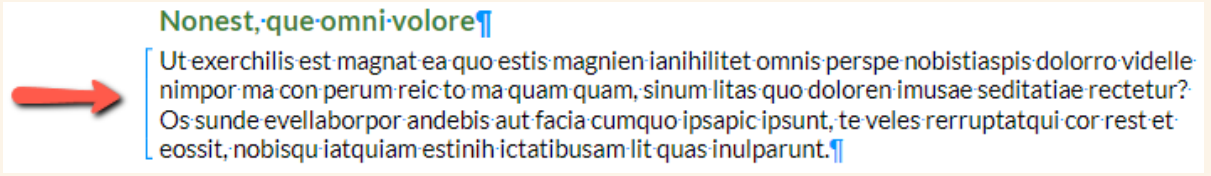
Keep with Next

It ensures that the selected paragraph and the paragraph immediately after will not be separated by a page break. This option can be found under *Paragraph Properties*.



Keep lines together

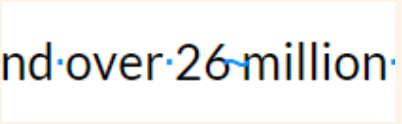
It ensures that the lines of a selected paragraph always stay together. If a paragraph is at the end of a page, and keep lines together is applied, the entire paragraph will jump into the next page. This option can be found under *Paragraph Properties*.



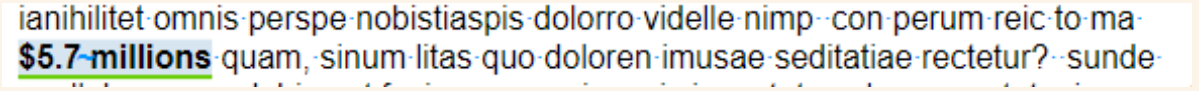
Non-breaking Spaces

Press “Ctrl + Shift + Space”.

When a line is breaking between values or dates you can replace the regular space for a non-breaking space. If the value “26 million” would break at the end of the line after “26” and would start on a new line with “million” that does not look good. The customer will want the “26” and “million” to stay together on the same line. The non-breaking space can be seen with “Non-printing Characters” turned on. It looks like a wave as seen on the right.

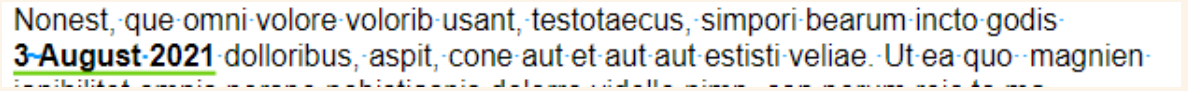


When values are linked to text and a “Unit Format” is to be applied, it is not possible to add the non-breaking space the same way. In this case you would have to tick the button “Keep unit on same line” from the right panel under “Link Formatting”, see example:



For now this unfortunately only works for values in “Accounting”, and not yet for “Percentage” and “Number”.

For a linked date in “Date” format, it will be automatically created between the day and month:



Non-Printing Sections

You can set a section as non-printing from the *Section Properties* panel.

The name of non-printing sections will show in italics and with a grey color in the outline. These sections will be hidden and excluded when exporting the document to PDF, DOCX, ICML, etc. Page numbering is not affected by non-printing sections when exporting to .docx or .pdf.

Non-printing sections do not affect headers and footers. You can still use the “Inherit from previous section” option in the header/footer after a non-printing section.

Sections marked as non-printing will get the footer and header back if the non-printing box is un- ticked.

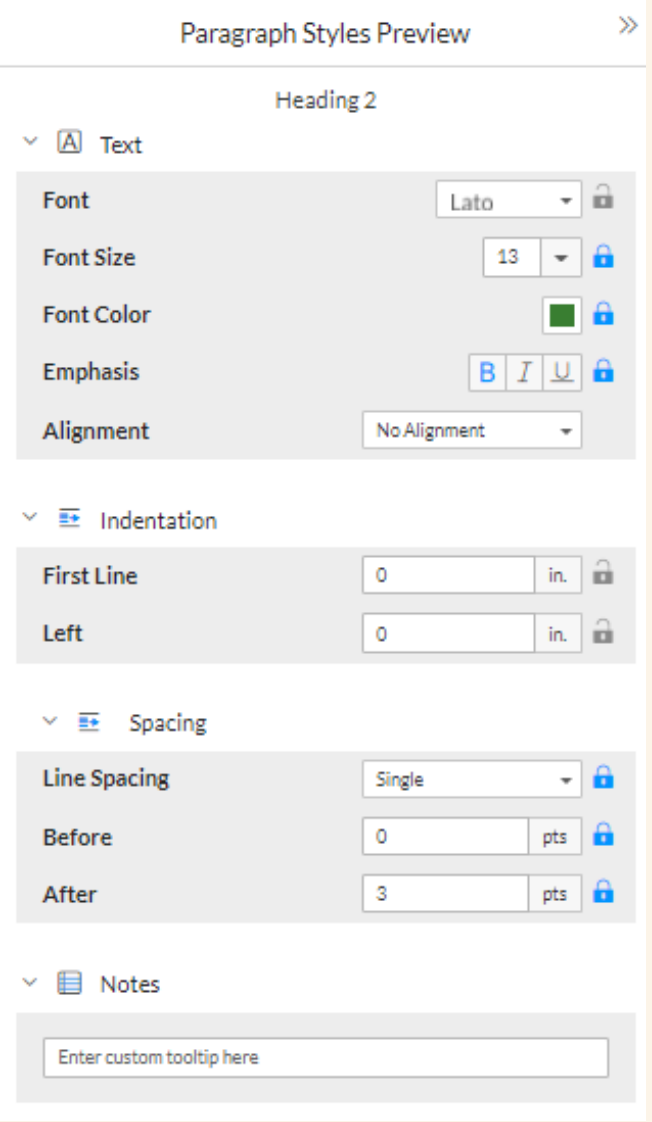
Styles

Style allow you to apply uniform formatting to the text and tables.

Note that only Document Owners can create and edit styles, but anyone can use them.

From the Style Guide Editor you will be able to modify the styles attributes. Use the lock to prevent changes. Changes to a style will be applied throughout the document.

Use Style Guides



When importing from docx, a styleguide will be generated.

Wdesk will create styles based on the docx styles. Some styles, such as the default *Normal* style can be corrupted during this process and cannot be deleted on itself. Also, certain paragraphs, tables and/or hard returns are imported with the *Normal* style and this can cause little bugs and glitches in the document. The solution would be to import another styleguide to override this automatically created styleguide.

Tables

Navigate to: Workiva Support Center → Using Workiva → Documents. Then scroll down to “Use Tables” to find many helpful articles regarding tables.

"How can I see the border color and line thickness used in a table?"

This is currently not possible. We recommend you keep a style sheet with this information, as well as border colors or any other information that could be useful for users to maintain consistency in the document.

"How can I get a space between the text and the table?"

Select the table by starting outside the table and drag your mouse to the other side, then set Spacing Before/After. The table needs to be in a style that allows for the spacing to change. If this is not the case, make sure follow the following steps:

1. Select one cell and press CTRL+A to select all, then CTRL+C to copy.
2. Select the entire table (selecting by dragging from outside the table) and change the style. You will notice the content of the table is now changed to that style.
3. Now paste the content, by selecting cell A1 and press CTRL+V. The styles in the table will change to how it was before, and the table will still be in the other style.
4. Now the spacing can be changed.

"How can I adjust the size of a table?"

Ensure there is enough space to adjust the table. If the table stretches from the left to right margin and a column is added, once you try to adjust one column it will jump to the smallest possible size. You first have to make another column smaller before you can make the new column bigger.

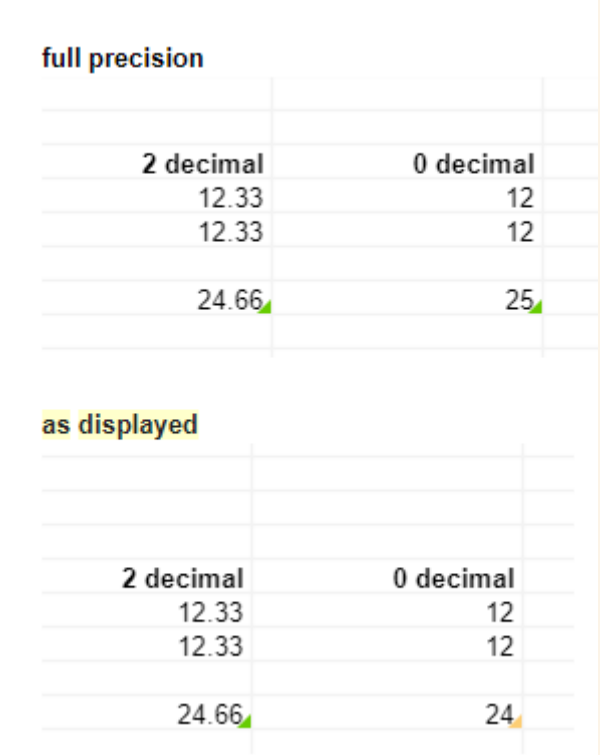
"How can I move tables to a different section?"

Our best practice is to select the entire table by placing your mouse top left next to the table and select by dragging to bottom right, again next to the table. Then use CTRL+X to cut and CTRL+V to paste back in. Even with destination links this will work. With source links, the link first has to be removed. By selecting the table this way it will retain the formatting and styles.

Value Accuracy

Ensure your financial report is ready for iXBRL:

- All financial values need to be set to accounting and percentage.
    - Percentage values should be presented in percentage format both in the Spreadsheet and Document (for example, 15.1% would be set up as 0.151).
- Values need to be entered and displayed in corresponding table accuracy (millions, thousands, etc.).
- Ideally we would match what client had previously (exact values, decimals, formula precision etc) and apply this consistently throughout.
- For entered/shown in values it has to match, otherwise they'll have problems with in text linking.
- Try to aim to get to a place where the file would be ready for tagging at any point in the future.
- *For SEC taxonomies (and likely other taxonomies as well as they evolve) formulas (sum and others) need to be set to "as displayed" as there are iXBRL calculations on top of the figures:*



full precision

2 decimal	0 decimal
12.33	12
12.33	12
24.66	25

as displayed

2 decimal	0 decimal
12.33	12
12.33	12
24.66	24

Value Accuracy

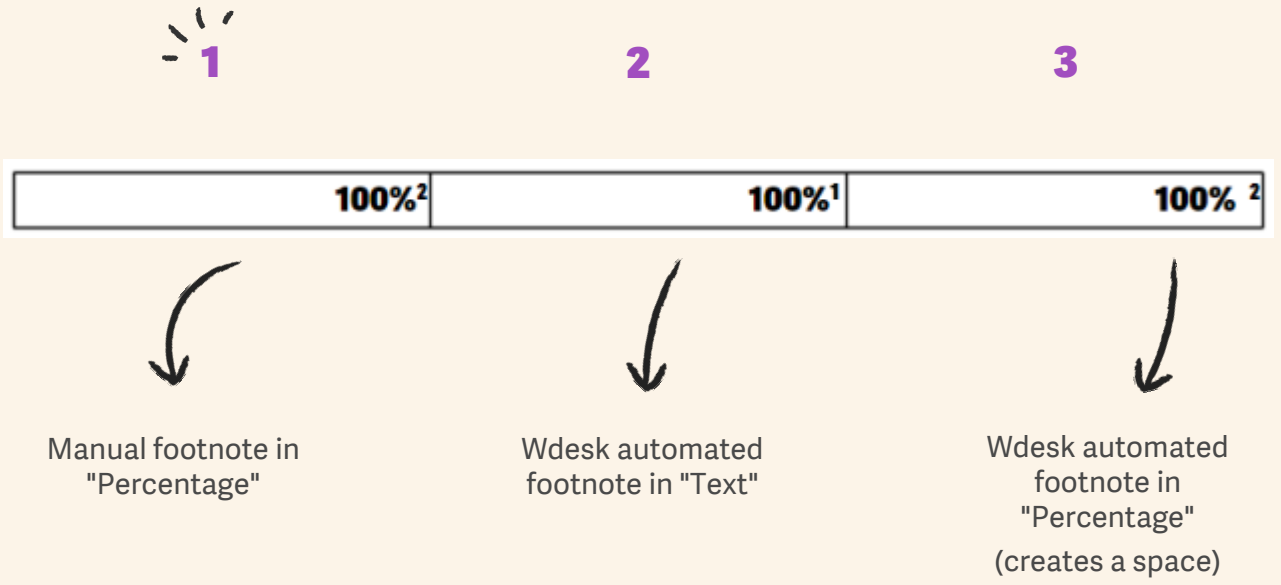
If there is no linking or tagging to be performed on the document, you can change the Value Accuracy to achieve certain formatting.

Example:

When using automated footnotes in tables next to a value that is set to “Percentage”, it will create a space. If you do not want this, you can modify the Value Accuracy to be set as “Text” which will remove the space. However, since we’re aiming for healthy documents which should be in a state where they are ready for any linking or tagging at any time in the future, there is only one way that should be followed:

1. Set the value in the correct Value Accuracy;
2. Add the footnote manually by entering a number after the value and making that superscript;
3. The value can then be linked through subcell linking.

So option 1 would be correct if footnotes need to be manually inserted for a certain reason:



There are two other articles which are very useful when it comes to formatting and managing links or linked values:

- Format linked values
- Manage Source Links

36 Resources

Where can you find resources?

- Support Center
- Workiva Community
- The Learning Hub

Support Center

New to Wdesk
Getting Started - Information about Workspaces, Folders and Files.

Using Workiva — Quick link to see products.

How to have a great ESEF filing

Spreadsheets
Spreadsheets

Wdesk sync

Documents
Documents

Linking
Linking

Linking in Documents

Learning Hub

- Discover Workiva: 4 min

General

- On Demand: Next Generation Documents and Spreadsheets: 57 min
- Introduction to Folders: 8 min
- Discover Documents: 16 min
- Discover Spreadsheets: 9 min
- Introduction to Charts: 32 min
- Discover Presentations: 5 min

Design Reporting

Design Reporting with Workiva - Webinar

Welcome Guide to Designers Working in the ESEF - PDF Guide

Working with Design in the ESEF - PDF Guide

Designed Reporting Guidelines

These PDF guides are frequently updated so make sure to follow the post for any updates.

Design Reporting Guidelines

Design Reporting Quick Start Guides (Multiple Languages)

Wdesk> InDesign > Wdesk

Export for InDesign

Moving Workiva Content to InDesign for Design Reporting - Video 7 min

Roundtrip Process with InDesign-Wdesk and XBRL - Step-by-step article

Learning Hub

"Designed Reporting" Training - 20 min

If you cannot find an answer to your questions, you can contact our Support team. They are available 24/7.

39 Contacts

Support contacts

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

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

A full list of our global support telephone numbers can be located here

Or e-mail our Support Team directly via support@workiva.com