

The Widget NewTools

Designers guide to new premium design tools

Extensions

Workiva Proprietary Information

workiva

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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.

The document shows functionality that is still under development, and may or may not become available in Workiva's sole discretion. Some features may never become commercially available. Whilst Workiva will use commercially reasonable endeavours to communicate with its developer community, features and rollout timings cannot be guaranteed and may change without notice. Designers should test all exports regularly.

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

Welcome

Introduction

Welcome to Workiva! We are a cloud-based connected and 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. Don't be too daunted! You will be able to create great looking reports, without worrying about out of date copy and with a small amount of time investment up front you'll be a pro in no time. 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. You will need this Widget also.



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

The **Widget Export for web** is also available.



TheWidget-Premium compliments **TheWidget-Platform**. Where you see this symbol in TheWidget-Platform - use this Premium document.

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 and 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' - especially for designers.

1 - Introduction to structured content

Structured content is information or content that is organized predictably.

Understanding the nature of structured content is critical to obtaining the maximum benefits it offers. Efficiency, accuracy and ease of authoring are all desirable benefits.

What do we mean by structured content? Why do custom styles matter?

[\[Full webinar link\]](#)
Please note that Workshop 1 and 2 are together in this webinar

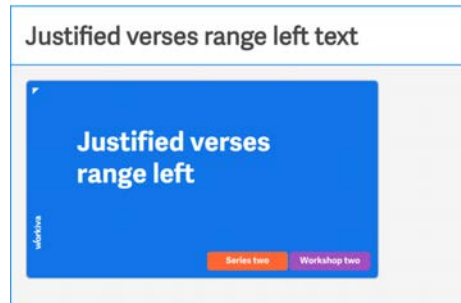
12 - Building digital value

Completed this series? Now let's look at new opportunities that data driven authoring together with Workiva can bring

[\[Full webinar link\]](#)

Stuck?

We have many short videos addressing individual topics. Don't struggle or get frustrated - check out this section.



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 design tools from 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.



The Widgets

The Widgets - Platform and InDesign Integration are your guide on how to's 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.



General platform support

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

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

Need to contact a human?

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

Out of hours

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

Core Essentials

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Object frames

Object frames allow greater flexibility and freedom for document layout.

These allow the user to place content into a moveable box that can be sized and positioned as desired.

There are 4 different types of object frames and these are covered in their own sections.

Top tip: The frame formats are not interchangeable, so you will need to choose the correct one for the right effect when placing it. i.e. to create a table you will need to insert a floating table.

This section covers elements that are common to all the **Object** frames.

The object anchor

All object frames will have an anchor. This is required to hold the frame to the page it sits on and can affect the object frames position.



An anchor's location can be identified by clicking on a Floating Objects frame. Each frame will have its own anchor.

In the example below, we can see that by selecting the floating anchor image that there is an actual anchor for that image before the word All.

The object anchor

All object frames will have an anchor. This is required to hold the frame to the page it sits on and can affect the object frames position.



Moving an anchor

An anchor can be moved at anytime. If a Floating Object is selected then hovering over its anchor will change the mouse icon to a hand and the anchor can be clicked and dragged around the page.

An anchor will snap to the nearest column and paragraph as it is moved around the page.

Top tip: Moving an anchor can affect the position of text around your object frame, if text wrap has been applied.

Editing text around an anchor

Currently, anchors cannot be locked and move with text. If the text around an anchor is edited you may notice that when the anchor moves that the object will also move.

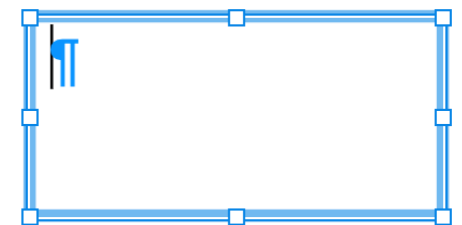
This is particularly noticeable if the anchor changes columns due to text editing. The object will need to be moved back to its original position if needed.

Selecting an existing Object frame

When text on the page is hovered over with the mouse cursor, a type icon appears but when a selectable object is hovered over the icon changes to an arrow.

This is the same for Object frames and inline tables. To select the Object frame, just click on it when the icon changes to a pointer whilst hovering over it.

Selecting the frame will make the objects edge appear highlighted with a blue border. It can now be dragged around, resized, have its properties altered and its content edited (it may require a further click into the frame to start editing inside it).



Object frames

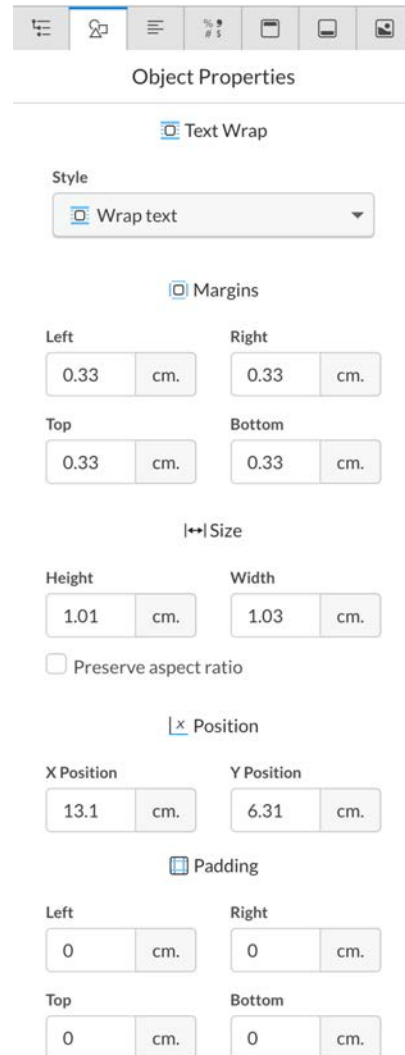
Object Properties

The Object Properties panel is used to control the layering/text wrap, margins, positioning and padding of your frames.

The properties for an Object frame will only be available when the frame is selected.

On the following pages we will break this panel down.

The same properties will appear for all 4 types of Object frame but not all properties may apply i.e. amending the padding values has no effect on floating images for instance.



Object Properties

Text Wrap

Style
Wrap text

Margins

Left: 0.33 cm. Right: 0.33 cm.
Top: 0.33 cm. Bottom: 0.33 cm.

Size

Height: 1.01 cm. Width: 1.03 cm.
 Preserve aspect ratio

Position

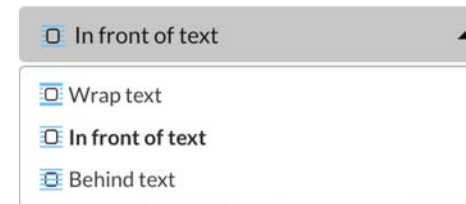
X Position: 13.1 cm. Y Position: 6.31 cm.

Padding

Left: 0 cm. Right: 0 cm.
Top: 0 cm. Bottom: 0 cm.

Text Wrap

Under the Text Wrap heading is a dropdown menu where you can choose how the text around the frame will interact with it.



In front of text

Wrap text

In front of text

Behind text

Wrap text

Wrap text will cause the frame to push any inline text it sits over to 'wrap' around the frame.

Top tip: Wrap text will not affect other frames with text in. It will only affect inline text sitting under the placed frame.

To effect the distance of the text wrap from the object see Margins.

In front of text

This will make the object sit in front of any inline content it is placed on.

Here is an example of a Text box placed **in front of this text.**

This frame is easily selectable as it sits over the inline content.

Behind text

This will make the object sit behind any inline content it is placed on.

Here is an example of a Text box placed **behind this text.**

This text is inline and this is why the box can be adjusted to sit partly under the text. The text box anchor is set at the start of this paragraph which means the box will move with the text.

Top tip: An object frame placed behind inline content i.e. the text example above, can be hard to select if it is completely covered by inline content. In our example, the text had to be moved first, so the position of the frame could be adjusted.

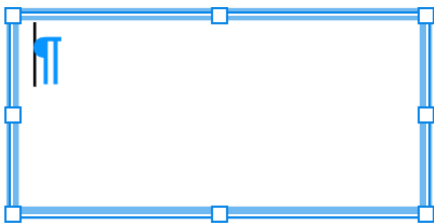
Object frames

Margins

These settings are greyed out unless Wrap text is applied and then they can be adjusted to adjust the space between the edge of the frame and the text that is wrapping around it.

Size

Although an object can be resized at any time by just clicking and dragging on any of the 8 points around its edge, it can also have exact size measurements applied in the properties panel.



Top tip: Holding down the shift key whilst manually resizing a frame will make the size increase/decrease proportionally.

In the Size Properties you can enter an exact Height and Width and also tick 'Preserve aspect ratio' to make these sizes increase/decrease proportionally when either is changed.

↔ Size

Height	Width
2.43 cm.	5.08 cm.

Preserve aspect ratio

Position

Exact positioning can be set here. There is a Horizontal **X position** and a Vertical **Y position**. The numbers reflect the page position of the top left point of the selected Object.

|x Position

X Position	Y Position
15 cm.	8 cm.

Top tip: X Position 0 and Y position 0 are the top left corner of the page.

Padding

Padding is the space between the frame edge and the content within the frame.

Padding only affects text boxes.

Top tip: Padding does not affect table, image or chart objects.

When created, a floating text box, by default, will have all padding set to 0.25cm / 1 inch (dependent on your document unit settings).

Padding

Left	Right
0.25 cm.	0.25 cm.
Top	Bottom
0.25 cm.	0.25 cm.

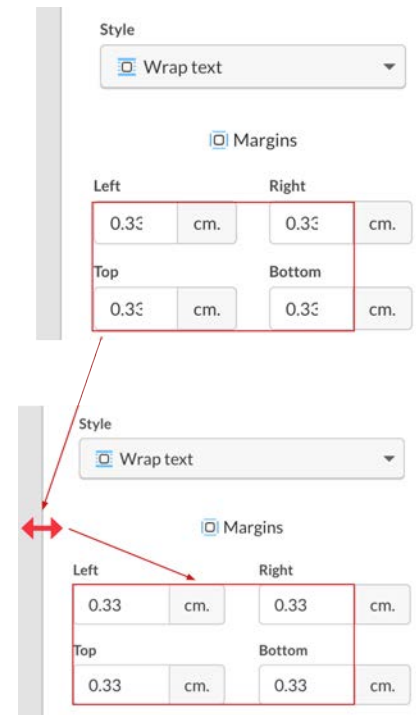
The padding value can be set to anything between 0 and 22 (regardless of unit setting)

All 4 edges padding can be set independently of each other.

Widening the panel

Sometimes it can be hard to see the full measurements in the Panels. This is easy to remedy.

Hovering over the lefthand side of the panel will display a 2 way arrow icon. When that is displayed you can just hold down the left mouse button and drag to whatever width you require.



Object frames

Re-ordering objects

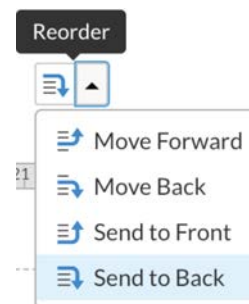
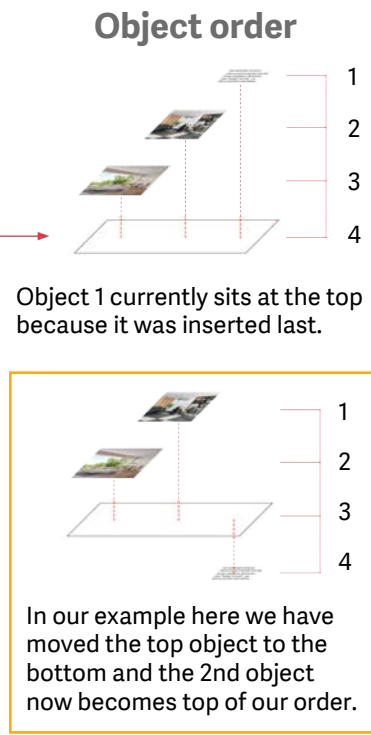
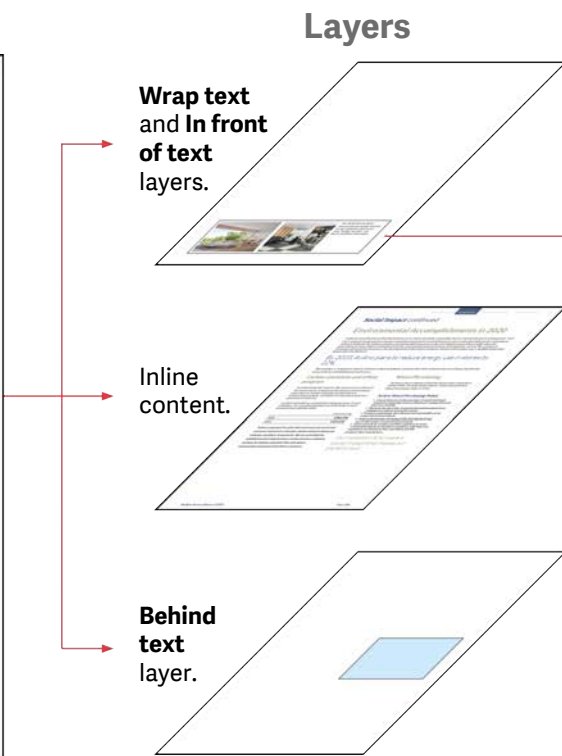
The order of objects (how objects layer on top of one another) is defined on a page by page basis and is based on the order of insertion and what text wrapping option has been applied.

Think of text wrap as layers that either sit above or below inline content.

Each new object will become the top object of the layer it is set to. Visually, it will be above any other objects on that layer if moved in front of them.

If you need to move an object, on a layer, in front of or behind another object then you will need to adjust the order. This is done by using the Reorder dropdown.

With the Object selected you can then use the Reorder dropdown to move the object to 1 of 4 options on that layer.



Move Forward and **Move back** will move the object 1 place up or down the order whereas **Send to Front** and **Send to Back** will make the object either the top or bottom object in the order.

Object frames

Aligning objects

Although objects can be positioned and aligned manually by entering in exact measurements for their X and/or Y axis, we have included inbuilt tools to ease this process.

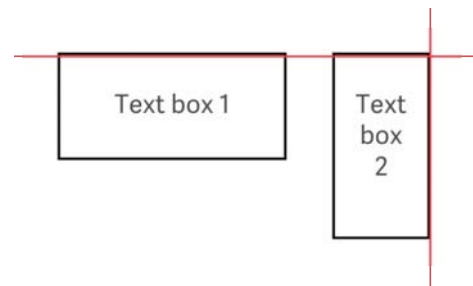
Snap to

A common tool for aligning objects is a 'Snap to' function. As an object is moved around the page and gets either near the center of the page or another object, red lines will appear showing where the center of the page is and where another objects edge or middle may align with your selected object.

The object being moved around will snap to one or more of these lines if moved close enough. This will mean the object will be aligned on the edge that has snapped to any red line.

Top tip: 'Snap to' negates the need to enter exact measurements every time objects align.

In our example Text box 2 is aligned along the top edge with Text box 1 and it is also aligned with the center of the page on its right-hand edge.



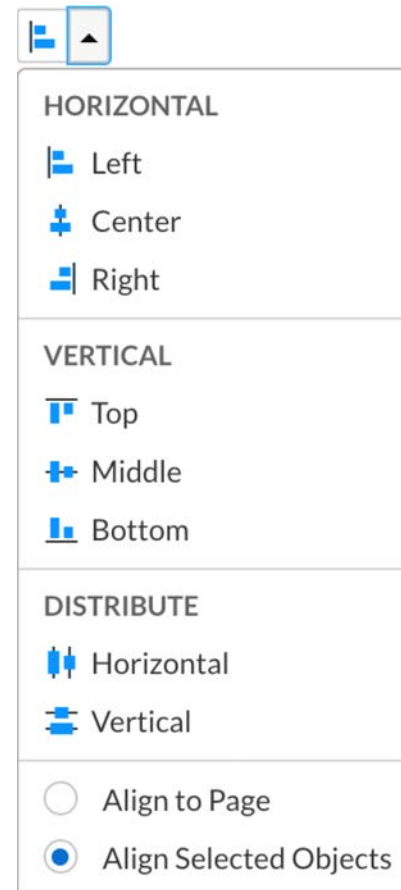
Alignment tool

To quickly align multiple objects you can select more than one at a time by holding down the SHIFT key and clicking on all the required objects.

With the objects selected you can use the Align/Distribute dropdown menu to align them or distribute them.

Align

Objects can be aligned on either the Horizontal or Vertical axis and whichever option you then choose. i.e. Horizontal & Center will take the center point of your selected objects and align all the objects centers with that horizontally.



Distribute

Distribute will only work for a selection of 3 or more objects, as it will equalise the space between those objects on the selected axis.

So if you choose 4 objects and distribute on the Horizontal axis then the space across the page between objects 1, 2, 3 and 4 will be made identical. This does not resize the objects but just moves the center objects to the correct position.

Top tip: If the center objects overlap the outer objects when using distribute, you may not get the result you require.

Text box

Object frames

The text box is used for inserting a floating object that can be moved anywhere on the page.

As the name suggests this box is used for adding floating text onto a page layout.

As well as text, the box can have a fill and border added.

When to use

If you have a text layout that is not achievable using the platforms default inline format then a text box could be the solution.

How to create

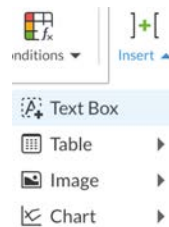
To insert a text box, go to the main menu and under the Edit tab, click on the Insert drop down and choose Text Box.

A small crosshair will appear which can be moved around the screen with your mouse.

You can either just left click on the page you wish the box to appear on and a default sized box will appear or you can left click and hold your mouse button down to draw a larger/smaller box.

The box can be resized at anytime, so you don't have to get the size exact at the first attempt.

Top tip: Holding down the shift key whilst placing and/or resizing a text box will size the box in proportion.



How to add text

When first created a text box will start with the cursor inside the box and you can type or paste text straight into it.

Styles can also be applied to the content.

If you have clicked off of the text box then one click will select the box but it requires a double click to make the cursor active again within the box.

How to delete

When a box is first created you need to click on the border of it and click delete to remove it.

If you have unselected the box then just clicking on the box once and pressing delete will remove it.

If you click and move a box you will need to select it again to delete it.

The box anchor

The box anchor is what links the box to the page and can affect the boxes position. See object frames for a full description.

Object Properties

Object Properties are where you can exactly set size, padding, etc. See object frames for a description.

Layering and alignment

See Object frames on the previous page for a description.

Text box

Object frames

Adding a fill

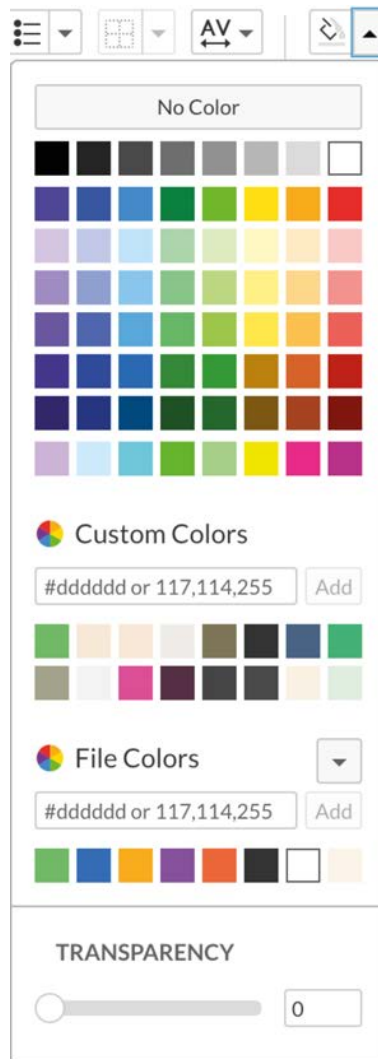
To add a fill to your text box you need to have the object selected, click on the Edit menu and then click the dropdown for the Fill color picker.

Clicking on a color swatch will apply it to the selected object.

See our section on the [Color picker](#) for a full description of how the color picker works.

An applied color can also have a transparency set here.

Top tip: Previous settings will be held in the fill dropdown but will not be applied to a new box unless re-selected.



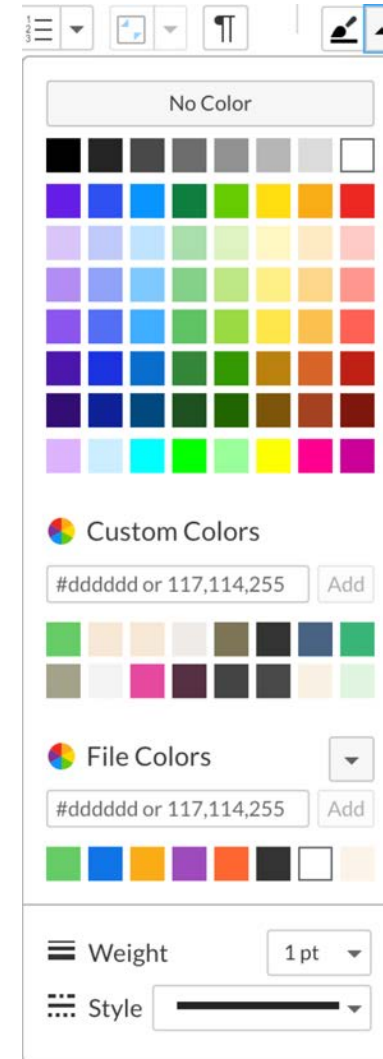
Adding a border

Adding a border to your text box is done by selecting the object, clicking on the Edit menu and clicking onto the rule picker dropdown menu.

Here you can set the rule weight, style and color.

Select the rule weight and style before picking the color, as once the color is selected the panel will close and the settings will be applied to your box.

Top tip: Currently, only weights from 1pt though to 10pt are selectable from the weight menu.



Floating table

Object frames

A floating table allows the user to create and place a table anywhere on the page.

Apart from allowing the user to freely move a table around the page the functionality is generally the same as an inline table, although images cannot be placed into a floating table.

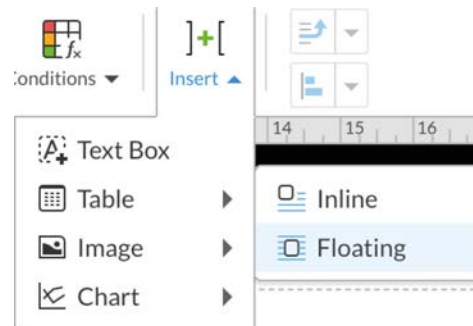
Top tip: Unlike inline tables, an image cannot be placed within a floating table.

When to use

If you have a table position that is not achievable using the platform's default inline format then a floating table could be the solution.

How to create

To insert a floating table, go to the main menu and under the Edit tab, click on the Insert drop-down and choose Table/Floating.



A default 5 column x10 row table will appear on the page. Rows or columns can be added or removed from this table as they would be from an inline table.

Top tip: Holding down the shift key while resizing a floating table will size the box and table cells in proportion but not any text within the cells.

How to add text

You need to click a cell inside the table to type or paste text into it.

Styles can also be applied to the content. If you have clicked off the floating table then hovering over it will display an outline of the cells and one click will select a cell.

How to delete

To delete a floating table you need to click on its edge and then delete.

The box anchor

The box anchor is what links the floating table to the page and can affect the table's position. See object frames for a full description.

Object Properties

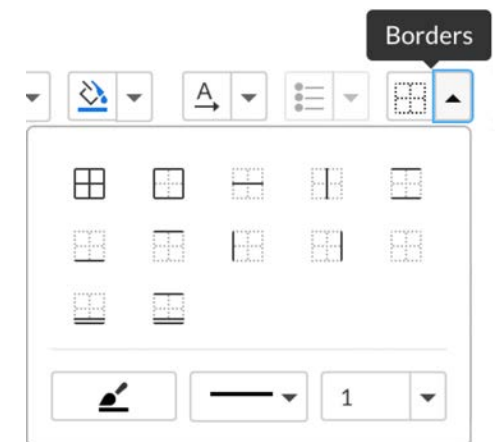
Object Properties are where you can exactly set size, padding, etc. For tables, margins cannot be set. See object frames for a description.

Adding a fill

A fill can be added to any selected cells in the same way it is done for an inline table by using the fill color picker.

Adding rules

Rules are added to cells in the same way as they are for inline cells by selecting the cells you want to apply a rule to and using the borders dropdown to select the weight, style, color and edge or edges to apply the rule to.



Linked text/data

Data and text can be linked within the cells of a floating table, just as it can with an inline table.

Layering and alignment

See object frames for a description.

Floating image

Object frames

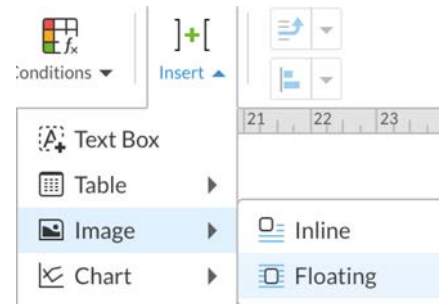
A floating image allows the user to place and move an image around anywhere on the page.

When to use

Design will often require images to sit outside the constraints of a standard page grid and this allows you the freedom to do that.

How to create

To insert a floating image, go to the main menu and under the Edit tab, click on the Insert drop down and choose Image / Floating.



Browse to the location of your image, select and open.

The image will size in proportion to fill the column width it is placed into unless the exact DPI falls under that size, in which case it will display as the DPI of the image.

Top tip: A Photoshop image with a fixed DPI will import to that size unless the column width is smaller.

Top tip: A cropped and exported InDesign image will retain the images underlying DPI regardless of export settings and will import to that size unless the column width is smaller.

How to resize

The image can be resized at any time by just clicking and dragging on any of the 8 points around its edge.

Top tip: Hold down the shift key while resizing a floating image to resize it in proportion.

How to delete

To delete a floating image you need to click on it and then delete.

The box anchor

The box anchor is what links the floating image to the page and can affect the boxes position. See object frames for a full description.

Object properties

Object properties are where you can exactly set size, margins, etc. For images padding has no effect. See [Object frames](#) for a description.

Layering and alignment

See [Object frames](#) for a description.

Updating

Unfortunately, it is not yet possible to update an image via its link.

To replace an image you will need to upload it again and apply any previous size and position settings.

Floating image

Object frames

Adding a fill

To add a fill to your image you need to have the object selected, click on the Edit menu and then click the dropdown for the Fill color picker.

Clicking on a color swatch will apply it to the selected object.

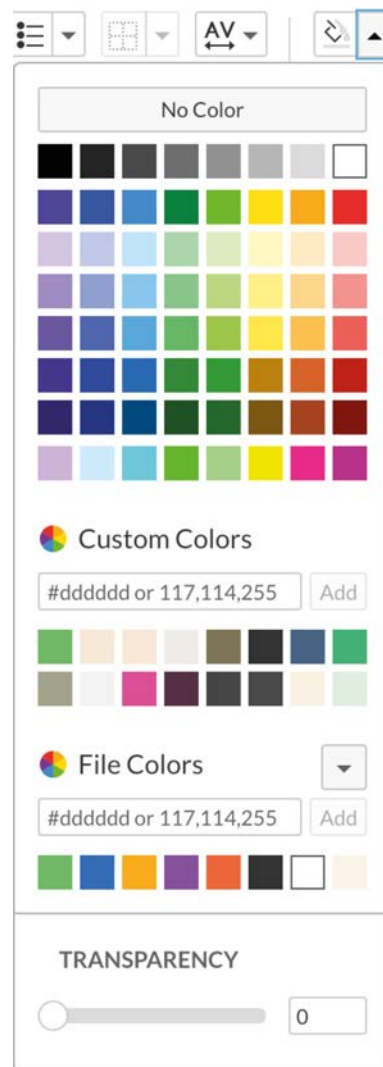
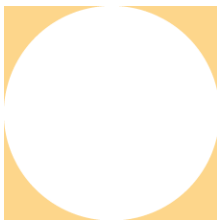
See our section on the [Color picker](#) for a full description of how the color picker works.

An applied color can also have a transparency set here.

Top tip: Previous settings will be held in the fill dropdown but will not be applied to a new box unless re-selected.

A fill applied to an image is only visible if the image is a PNG with transparency.

In our example here we have a white circle PNG with an Orange fill applied to the box.



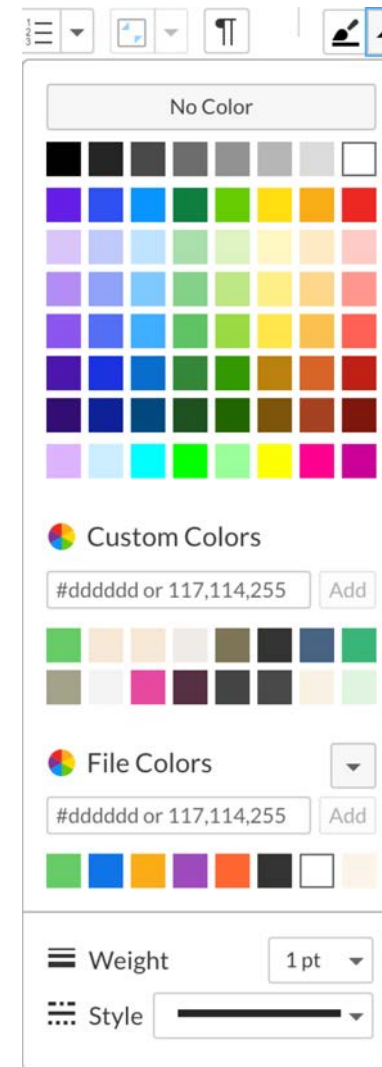
Adding a border

Adding a border to your image is done by selecting the object, clicking on the Edit menu and clicking onto the rule picker dropdown menu.

Here you can set the rule weight, style and color.

Select the rule weight and style before picking the color, as once the color is selected the panel will close and the settings will be applied to your box.

Top tip: Currently, only weights from 1pt though to 10pt are selectable from the weight menu.



Floating chart

Object frames

A floating chart allows the user to create and place a chart anywhere on the page.

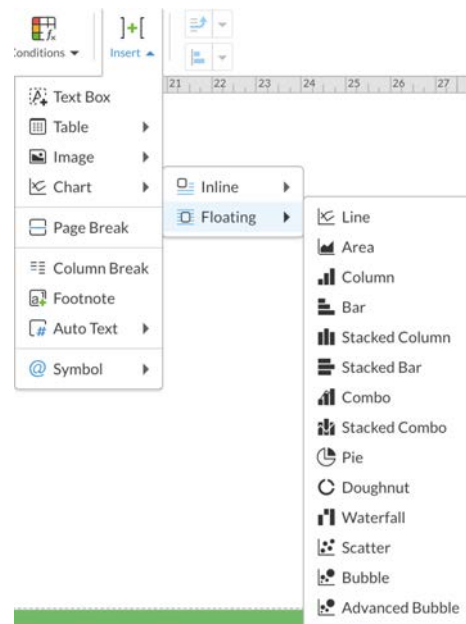
Apart from allowing the user to freely move a chart around the page the functionality is generally the same as an inline chart.

When to use

If you have a chart position that is not achievable using the platforms default inline format then a floating chart could be the solution.

How to create

To insert a floating chart, go to the main menu and under the Edit tab, click on the Insert drop-down and choose Chart/Floating and then select the type of chart you require.



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

How to resize

The chart can be resized at any time by just clicking and dragging on any of the 8 points around its edge.

Resizing will not change the size of any text within the chart.

Top tip: Hold down the shift key while resizing a floating chart to resize it in proportion.

Styling the chart

Adjusting and styling the chart is the same as it is for an inline chart. Please see [The Widget – Platform](#) for how to do this.

How to delete

When a chart is first created you need to click on the border of it and click delete to remove it.

If you have unselected the chart then just clicking on the box once and pressing delete will remove it.

If you click and move a chart you will need to select its edge to delete it.

The box anchor

The box anchor is what links the box to the page and can affect the boxes position. See object frames for a full description.

Object properties

Object properties are where you can exactly set size, margins, etc. Padding has no effect on a chart. See [Object frames](#) for a description.

Layering and alignment

See [Object frames](#) for a description.

Linked data

Data can be linked to your chart within the chart data spreadsheet, just as it can with an inline chart.

Floating chart

Object frames

Adding a fill

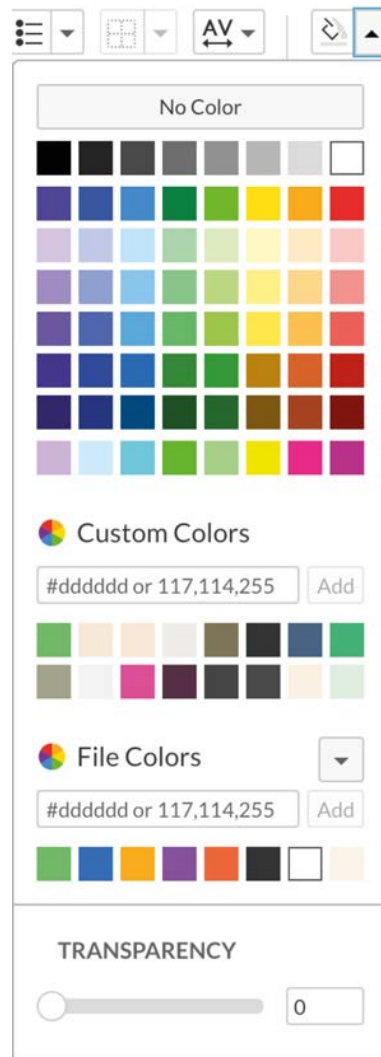
To add a fill to your chart you need to have the object selected, click on the Edit menu and then click the dropdown for the Fill color picker.

Clicking on a color swatch will apply it to the selected object.

See our section on the [Color picker](#) for a full description of how the color picker works.

An applied color can also have a transparency set here.

Top tip: Previous settings will be held in the fill dropdown but will not be applied to a new box unless re-selected.



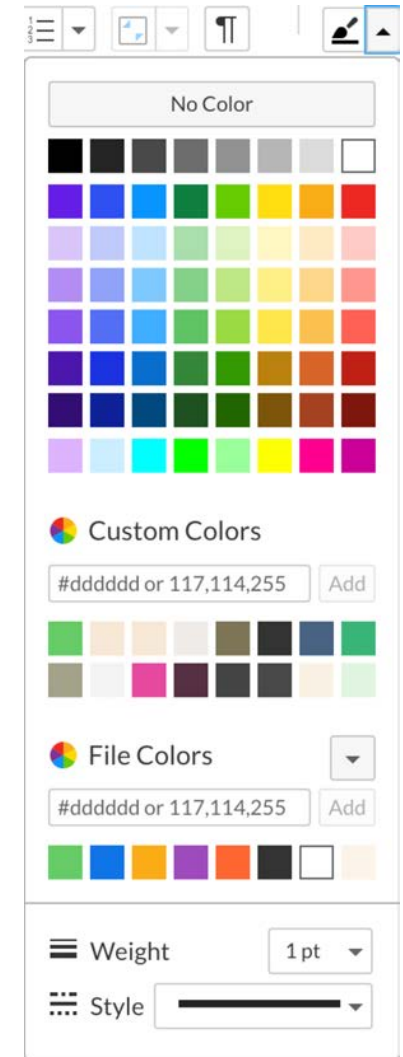
Adding a border

Adding a border to your chart is done by selecting the object, clicking on the Edit menu and clicking onto the rule picker dropdown menu.

Here you can set the rule weight, style and color.

Select the rule weight and style before picking the color, as once the color is selected the panel will close and the settings will be applied to your box.

Top tip: Currently, only weights from 1pt though to 10pt are selectable from the weight menu.



Character spacing

Character spacing allows the user to tighten or loosen the space between characters in words or whole paragraphs.

In the Design world text is often adjusted using character spacing (tracking) and this can now be done on the platform either manually to selected characters/words or applied at a style level, where it will then be applied to all instances of that style throughout a document.

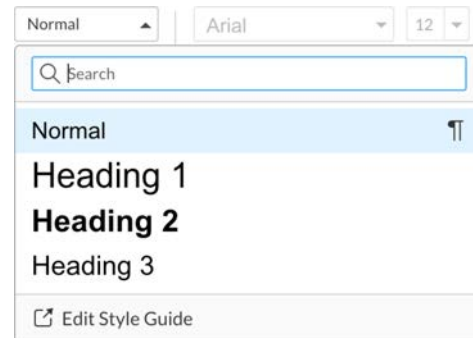
When to use

If your chosen font looks too tight or wide then character spacing is great for adjusting this globally.

Sometimes font spacing can look peculiar at a larger or smaller size and again, character spacing allows these instances to be adjusted.

How to apply Style level

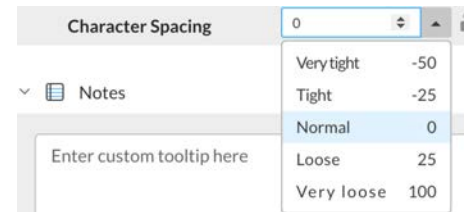
To apply character spacing at the style level of a document you need to open the style guide for your document.



Edit Style Guide can be found at the bottom of the style list.

Once in the style guide, select any style you wish to set Character spacing to and in the right-hand panel, at the bottom, you will see Character Spacing.

Top tip: The measurement used for character spacing is very similar to what designers should be used to.



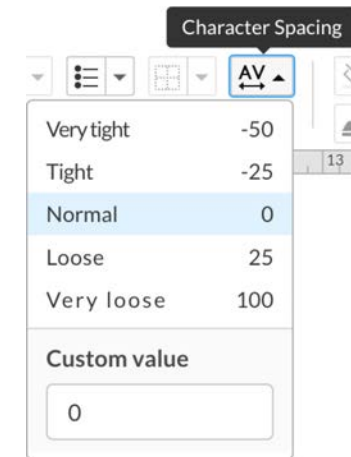
You can enter a manual value in here or choose from one of the pre-created settings.

Once you have amended all the necessary styles, click Publish to automatically apply them to your document.

Top tip: Unless character spacing is locked in the style guide, any manually applied character spacing will supersede a style's character spacing.

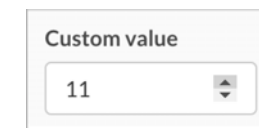
Manual level

To apply character spacing manually, you need to select the text or character you wish to affect and then under the Edit menu click on the Character Spacing dropdown.



You can either choose from the pre-created settings or type in your own custom value.

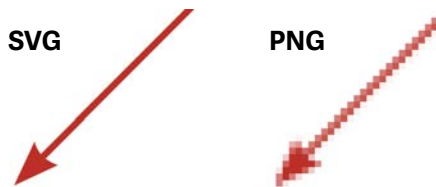
The change will take immediate effect and the selected texts spacing will change. You can use the arrow keys in Custom value to tweak this measurement up or down in realtime.



SVG support

SVG (Scalable Vector Graphic) is an image based format often used for logos, infographics and icons.

An SVG is built using mathematical calculations rather than pixels. This allows an SVG to scale to any size without any loss in quality, whereas a (rasterised) JPEG or PNG, which are built with pixels, can decrease in quality, as the size is increased/decreased.



In the example above you can easily see the difference between a vector image and a raster image.

SVGs can also be very small in file size, which can be a consideration if the file size limit for the iXBRL is low.

SVGs are also useful on the web, as text within the images can be searchable from a browser.



Jurisdiction consideration - Not all regulators will accept use of an SVG in filing submissions, so check whether the format is acceptable or that the process can incorporate them before using them.

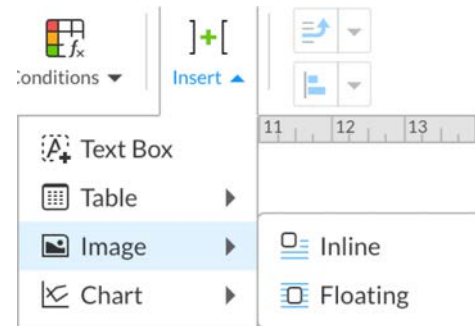
When to use

As stated earlier, SVGs are great for logos, infographics and icons and where these are used, it may be preferred to use an SVG. Regardless of the size, the image will appear crisp.

How to use

Inserting an SVG is just the same as inserting any image.

The only difference being that SVG is now a selectable format.



Place your cursor where you wish the image to appear and from the Insert menu choose either Inline or Floating.

You can then browse to the images location and select it.

Top tip: If you choose a Floating image for your SVG, it will make it much easier to size and move around your page.

Placed as an Inline image

See [TheWidget-Platform](#) on how to work with inline images.

Placed as a floating image

See [Floating image](#) for information on how to manage the image if it has been inserted this way.

How SVGs appear in exports

For a PDF export from the platform, SVGs export as png format. They currently export as SVG for the platform XHTML export.

Color picker

The Color picker has been updated in the color palette and now supports Document level colors (File colors).

As well as File level colors being added, you can also export/import color settings between documents/users and clear your current settings.

When to use

This should always be used for a documents colors, as it means all users can now select from the same color list while working on a file.

Setting up a documents colors is best done at the start of the document setup but it can be updated at any time.

Top tip: Double check your file colors when first input. The palette colors are not themselves linked to any content and therefore any color changes will need to be re-applied.

How to use

The color picker works much as before (See Color management in *TheWidget-Platform*)

Any action that requires the user to choose a color will involve the color palette but to initially set up a documents colors, you just need to access the palette.

Top tip: You can quickly access the color palette from the Highlighter dropdown.

The color picker

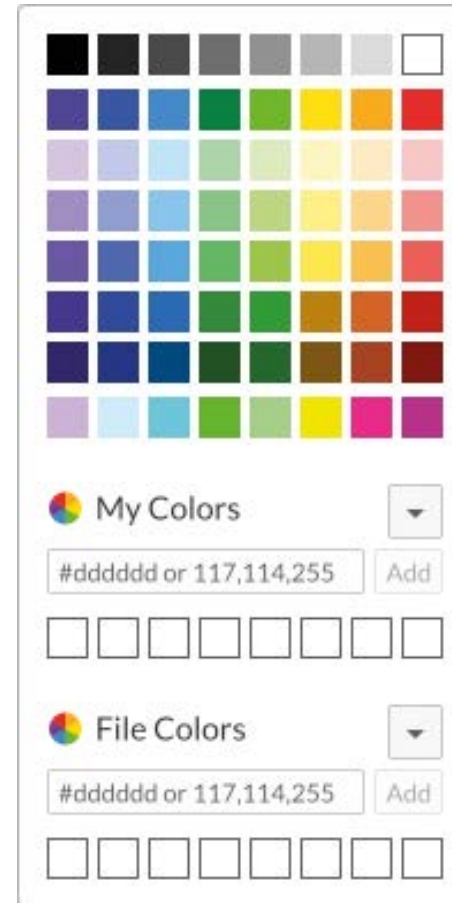
If there are no previous colors added to the color palette, then both 'My colors' and 'File colors' will be empty.

My colors

My colors - this is for adding colors that are linked to your login and will be displayed in this color picker for all documents you access.

File colors

File colors - this is where a document Admin can set the colors viewable by all users for that document. Each document will have its own file colors.

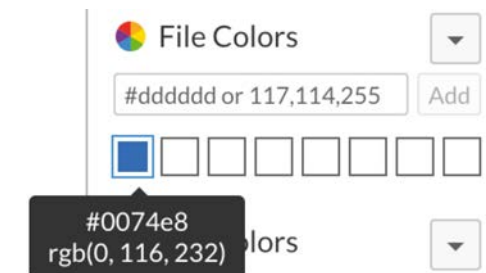


Adding a new color

To add a color to the color palette for My Colors or File Colors, you need to type or paste your colors Hex reference into the relevant box and click add.



This will add the color to the left box of your chosen color list and automatically close the palette. This will probably be changed so that the palette stays open instead.



If you re-open the palette, you will now see the added color in the list and if the color is hovered over then its HEX/RGB values will be displayed.

Color picker

Any additional colors added to this list will appear to the left of any existing colors and move all the current colors along one.

Top tip: File colors has a limit of 64 colors. My colors has a limit of 16 colors.

If the limit is reached then the last color will drop off the end of the list when a new one is added.

In our example below, a new green has been added which has pushed the blue color along one place.

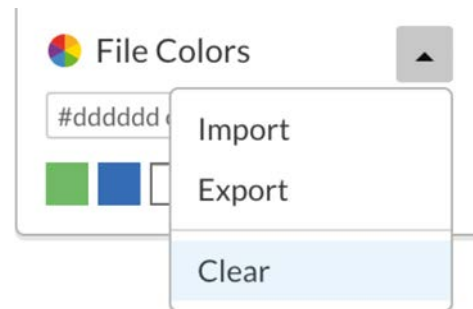


These colors can now be easily selected in the color picker and applied to content in the normal manner.

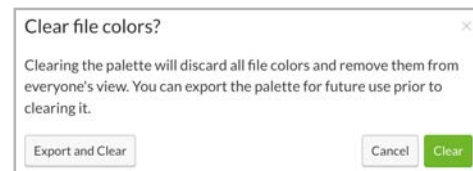
Clearing a color list

A color list can be cleared at any time but you will need to be the owner of the list to do this.

Open any color palette and under the dropdown for the color list you wish to remove, select Clear.



This will open a window asking you to confirm your decision to clear the current colors. You also have the option here to export and clear, which will export a copy of the color list in case you need to re-import it.



Clicking clear will remove all colors from the list.

Importing/exporting a color list

This allows a user to share color lists with other users, documents or workspaces.

The color list exports as a text document (.txt), this allows for easy editing outside the platform and can allow an experienced user to re-order a color list quickly.

Exporting

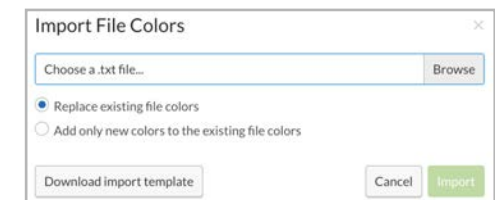
To export a color list, open the color palette, click on the list dropdown and click export.

A .txt file will be downloaded to your downloads folder.

Importing

To import a color list, open the color palette, click on the list dropdown and click import.

This will open up an import screen where you can browse to your .txt color file. You can choose to either Replace all the colors with your new import or just Add only new colors. There is also an option to download an import template (basically it will export your current list)

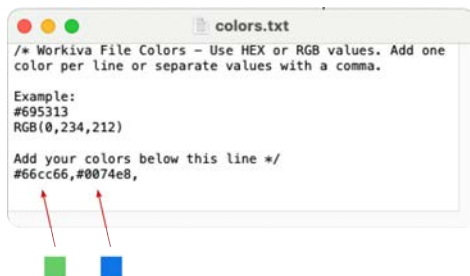


Color picker

Editing a color list txt file

A .txt format was chosen as any user should be able to edit this locally without the need for specialist software.

In the example below we have 2 colors specified in our list and they are the green and blue we have seen earlier in this guide.



The colors are displayed as per their Hex code values and the order is from first to last and can either be on separate lines or separated by a comma. This is the same order they will appear in the picker.

So if we change the order here and re-import then the order will change on the platform. You can also add or remove colors in this txt file.

Shapes and lines

Shapes and lines will enable users to add lines and shapes to their pages, much as they can add floating objects now.

This is still being developed but will be added to the early adopter programme soon.

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Written and designed by the Design Centre of Excellence, Workiva

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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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