

YOUR DESIGN JOURNEY

Trusted content wherever you publish

Design



workiva



WELCOME TO WORKIVA



We all want our reports to look great and this means employing a qualified designer but how do you keep data integrity when you use an external design agency? And how do you choose the right one?

Traditional workflows with edits sent via email and hand-crafted typography are inherently risky. Workiva offers a new approach where designers can concentrate on design rather than work with an outdated or inappropriate workflow process.

In this brochure and accompanying webinar.

1. **Design within the Workiva platform** - All the goodness of Workiva to create that great looking report
2. **Design using InDesign** - Keeping Workiva's USP of 100% data assurance when your designer is using another software to design
3. **Mixing both software programs for great results** - Design in Workiva mixed with design from InDesign
4. **Consistent data and narrative in your ESG report** - how design works here
5. **Design with Workiva for all your communication needs** - how Workiva can help with investor presentations and roadshows
6. **Beyond the report** - how to re-use your great report in other channels of media

Explaining Workiva's design functionality to visually boost your connected reporting

To watch the accompanying video
[\[click here\]](#)

DESIGN USING WORKIVA



Workiva isn't just about the numbers. Features are now available in the platform that enable designers to build impactful, creative pages. So how does this work practically - everyone working together in one place?

Workiva is a fantastic project management tool. It has advanced, comprehensive permissions where you can limit or expand who can access a section or sections.

Your designer can set up the style structure for your report so all you have to do is work on the content and apply the correct styles. Easy! When you are done, authorise your designer to come in and design your content.

Workiva has a full education program to get your designer up and running quickly. We recommend they complete the Essential Course for Designers before they start working on your project.

So, what are the benefits? Your data stays in one place, you can see the design of your report throughout the project and you can create an export whether PDF or XHTML at any time using a software that is built for today's corporate reporting.

In Workiva you can.

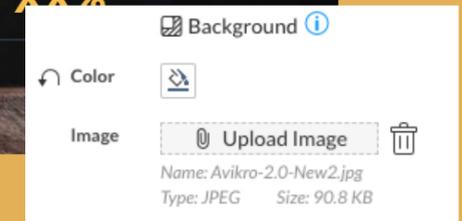
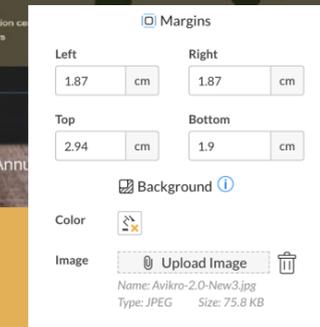
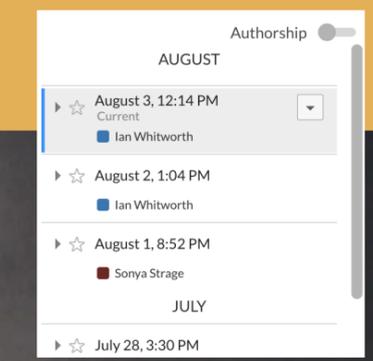
- Add your brand colours
- Add background images
- Set up your styles so they are consistent throughout your report
- Add headers and footers to all sections
- Alter line spacing

Everyone working on your report, including your design team, can work together.

- Control who can see or edit sections with advanced permissions
- Comments can be managed with coloured labels for quick identification
- Create milestones and blackline between different versions

YES!

You can design your report all in Workiva!



DESIGN USING WORKIVA



Workiva is excited to introduce additional design features into its platform. There are some great advantages to keeping all your design in one place.

- More collaborative
- Reduces authoring risk
- Immediate access to PDF/XHTML exports
- Edit within the design
- Better copy fitting
- Better rollover “year on year”
- More efficient

For some clients, this may mean that InDesign is not required at all or only partially required to design complex info graphics.

In addition to all the features listed previously, Workiva’s extensions consist of:

- Floating text frames
- Floating tables
- Floating images
- Floating charts
- Character spacing
- SVG support
- Improved colour pickers
- Shapes eg rules/lines

Floating objects

Object frames can contain text, table, images, charts and allow. These boxes allow the user to place content independently and can be sized and positioned as desired. Text can be wrapped around, in front or behind your floating objects.

Character spacing

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

SVG support

SVGs are resolution-less images for the web and Workiva now supports them. They are usually small in file size and they can scale without any loss in quality.

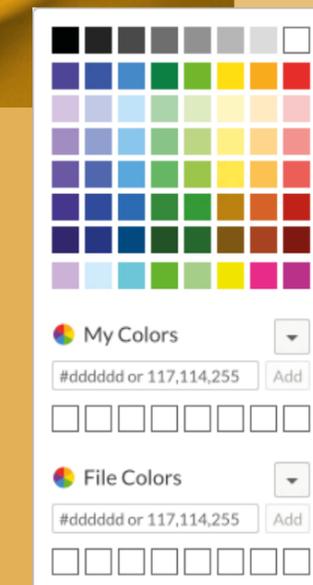
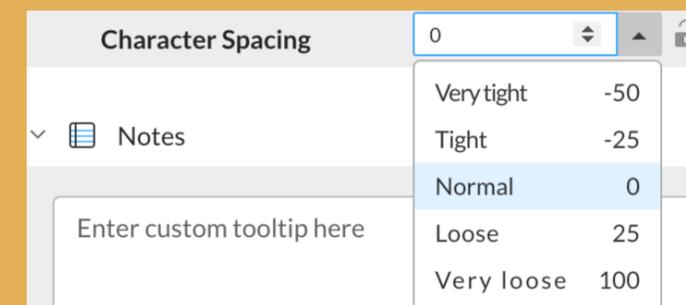
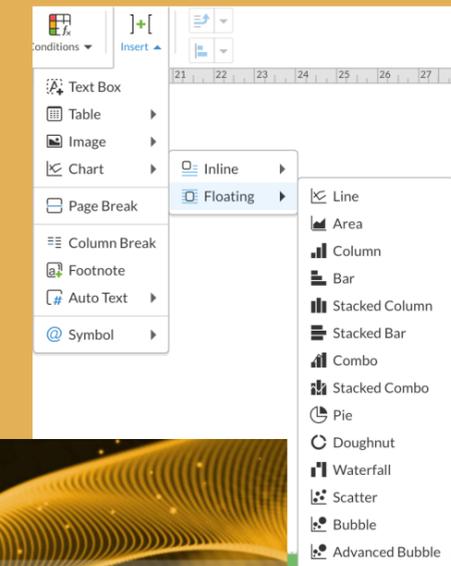
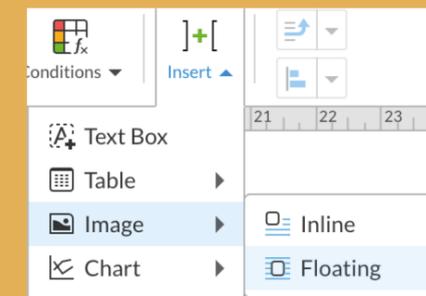
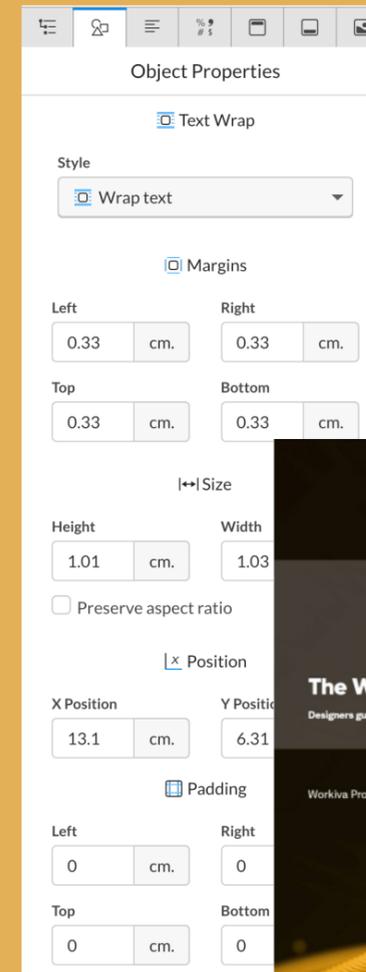
Improved colour picker

The Color picker has been updated and now supports Document level colors (File colors) that stay with the document. You can also export/import colors between documents/users and clear your current settings.

Document shapes

You can now place shapes within documents. This means you can also add lines and rules.

**You can design your report
with enhanced design tools all
within Workiva!**



DESIGN USING INDESIGN



For those clients and designers needing InDesign, we have that covered too. Clients still create all the content in Workiva but your designer designs in InDesign.

Your data assurance still remains 100%. Workiva is the **single source of truth** which drives the content that you send to your designer working in InDesign via linked ICML files. Your designer can still design but without the fear of accidentally changing the content or forgetting to do a correction.

Using linked content does require a certain discipline and designers are encouraged to join our short training course. The benefits though are enormous - report creators create - designers design. Your version is the correct version. How great is that!

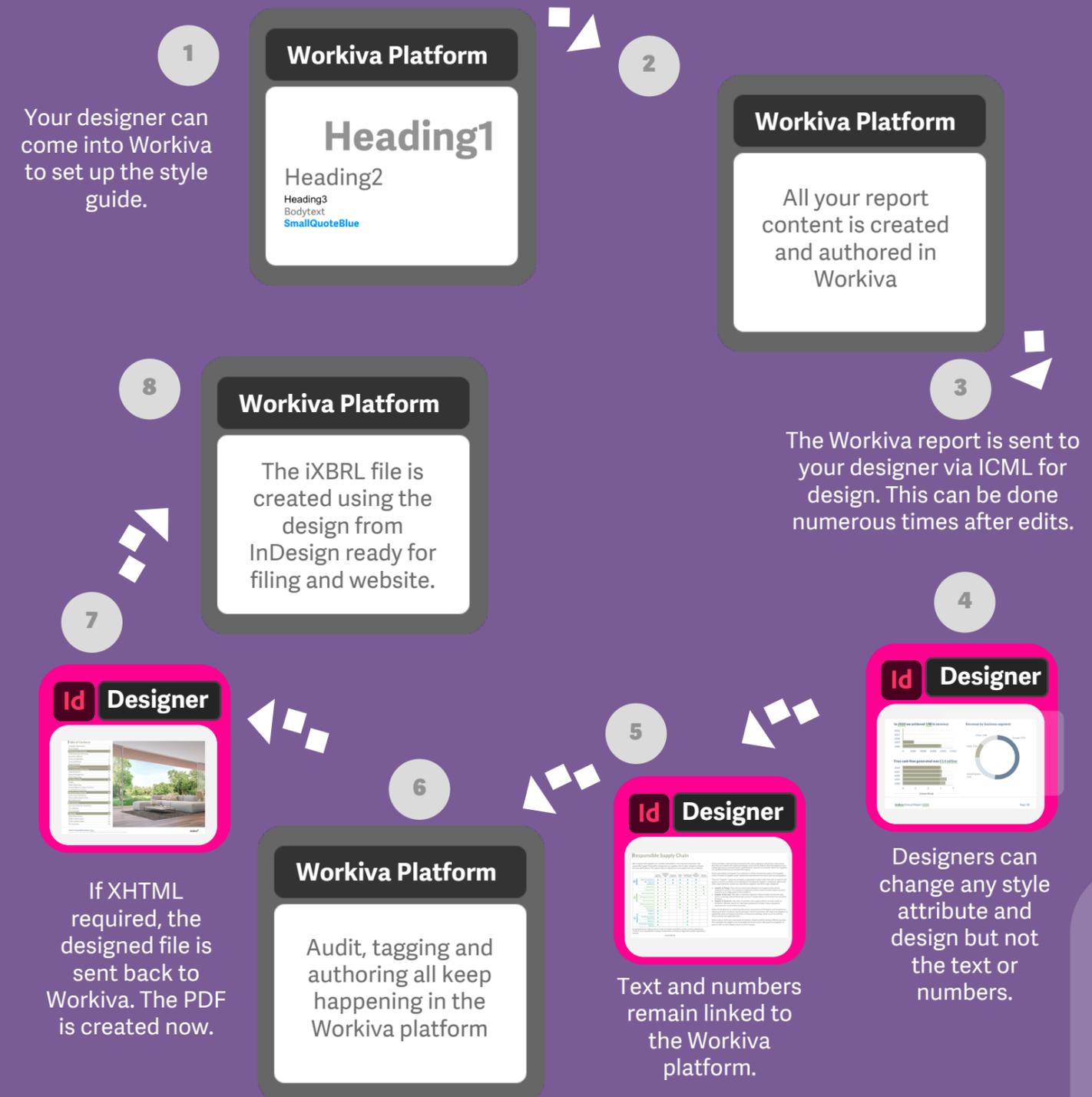
In Workiva the client.

- Let your designer set up your styles for the whole report
- Create your report and collaborate with all your authors
- Apply XBRL to your report at any time
- Invite your auditor to come into your report when ready
- Send your content to your designer via ICML for design elements
- Know your report is the same in Workiva and in InDesign because the files remain linked

In InDesign, the designer.

- Imports the ICML into InDesign with all styles applied to all content
- Can change style attributes where necessary
- Can add pictures and graphics
- Doesn't need to check amends as the content in Workiva will be the same as the content in InDesign
- Can create XHTML of their design in Workiva if required

100% data assurance
With linked data



WORKIVA FOR ESG



Get ready for ESG with Workiva's integrated ESG solution. Deliver wonderful *highly designed* reports by connecting data directly into your environment, sustainability and governance report.

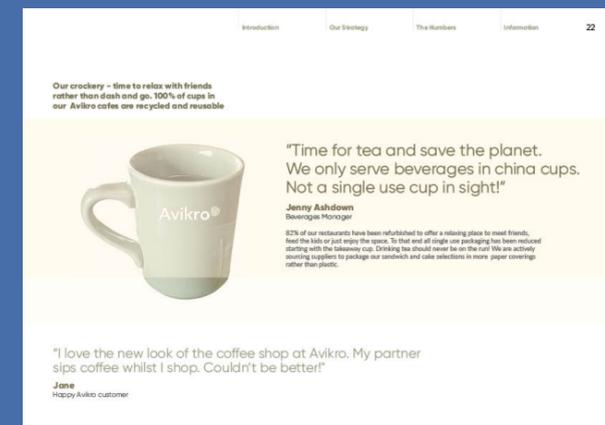
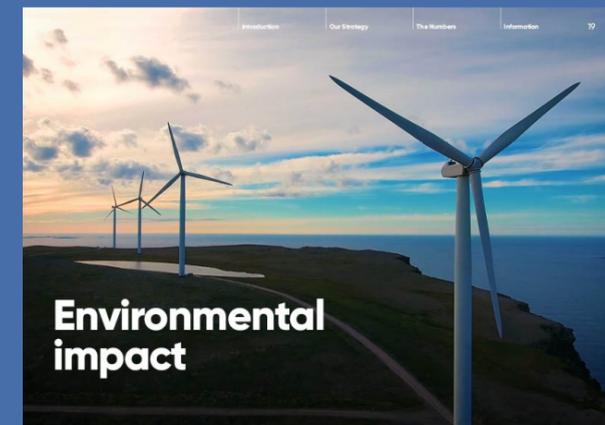
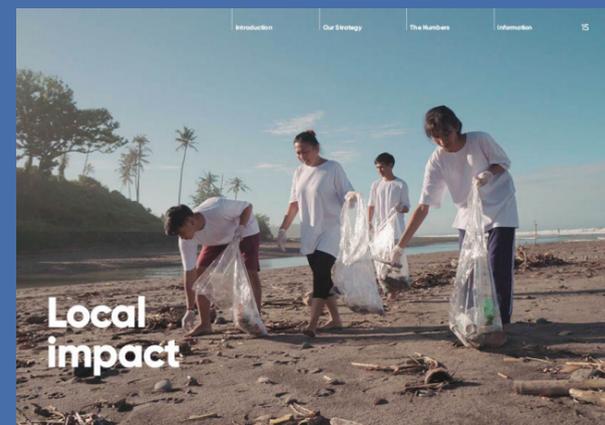
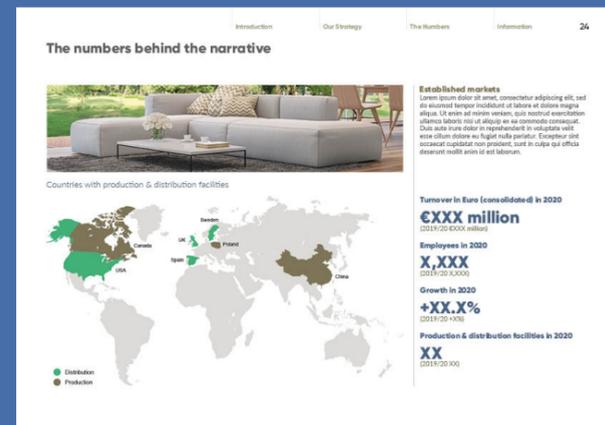
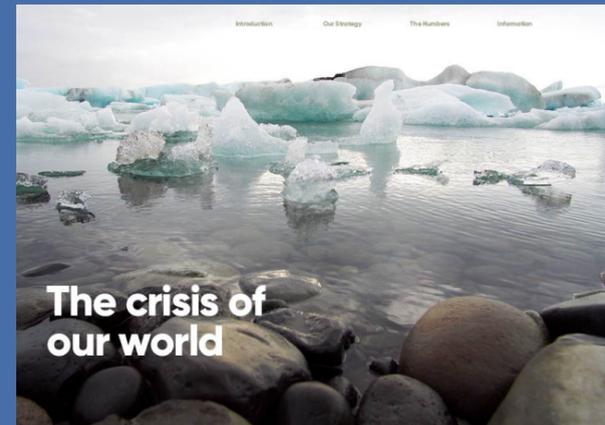
The great thing about Workiva is you can put important financial data within your narrative and relax. You know that if you change a number at source then it will change whatever it is in the report. In words and numbers too. This is great news for your readers. They don't have to skip to the financial section or find that one particular graph. The numbers truly can appear wherever you think they should be to inform, educate and entertain all your stakeholders.

In Workiva you can.

- Collect any data, from anywhere
- Build your strategy with any or all frameworks
- Get audit ready with transparent report data
- Report with confidence, with consistent data, to ensure your story is the same, every time
- Design on or off the platform

One unified platform

Integrate financial and non-financial data



WORKIVA FOR ALL COMMS



So Workiva for all your communications!
It's simple, fast and authoritative.

Don't keep Workiva just for your filing.
Do you know you can link data in all your presentations whether it is a management report, an ESG presentation or investor roadshow.

Be confident presenting, knowing that all your slides containing linked data will update automatically.

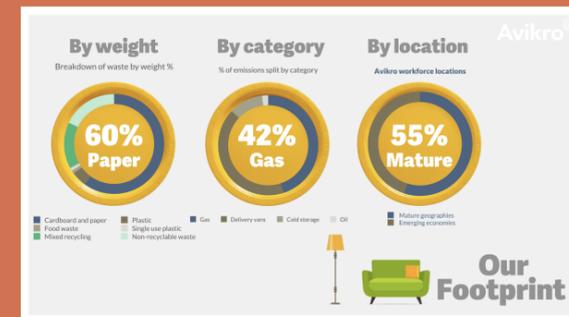
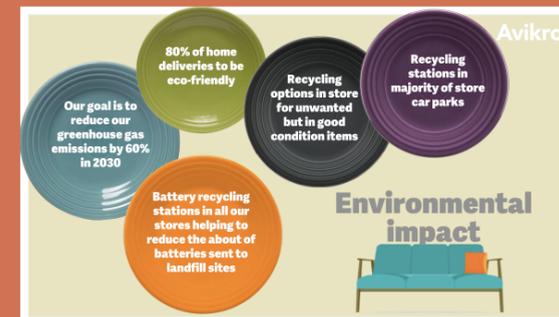
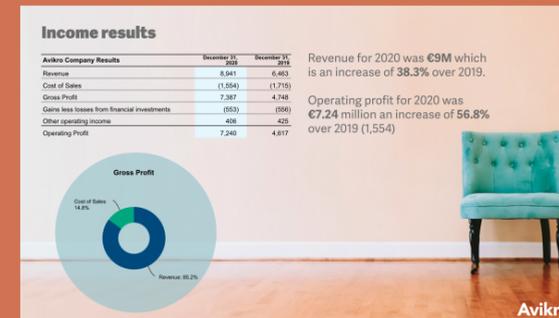
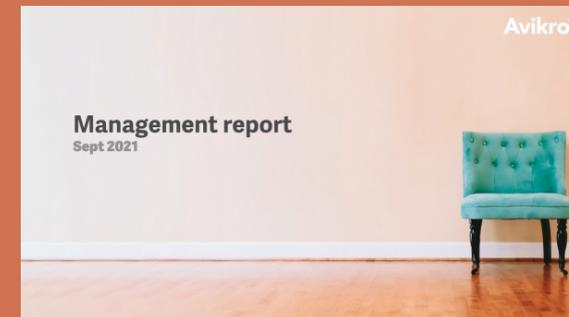
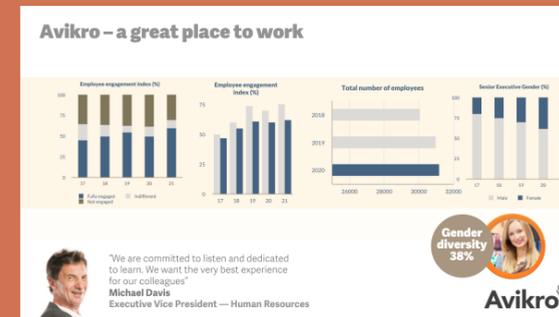
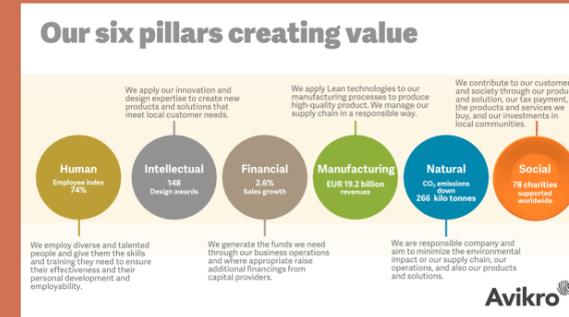
All these slides have been created within Workiva. Great design tools together with trusted content and you can present directly from the platform in your browser.

Designers can also use Presentations for designing infographics ready to import into your financial report again making great use of Workiva's linking capability.

In Workiva you can:

- Add shapes, text, charts, images and tables
- Connectors anchor directly to shapes for easy maneuverability
- Create links across multiple places
- Collaborate with others with full permission control
- Create and share templates
- Present your slides to full screen
- Export options

Trusted content Confident presentations with linked numbers and narrative



LOOKING BEYOND



Imagine a time when your trusted content can push out to your website in an instant

Imagine not having to read amends across multiple publishing channels - a press release, social media, InDesign, news feed or a website

Imagine changing a headline number and it changes everywhere you publish

Imagine yourself with a great deal more time

Well, dreams can come true and it's true now in Workiva. All of our clients realise the benefits of secure, managed content. That's why they use us.

Looking beyond we are bringing those benefits to the design community and forging a new authoring paradigm.

New ways of using content

Our **WebAPI** allow us to push content to your web staging areas in real-time. Make a change in Workiva and the content on your website is updated immediately. So, we can bring all the values of managed content we have for reporting to the web.

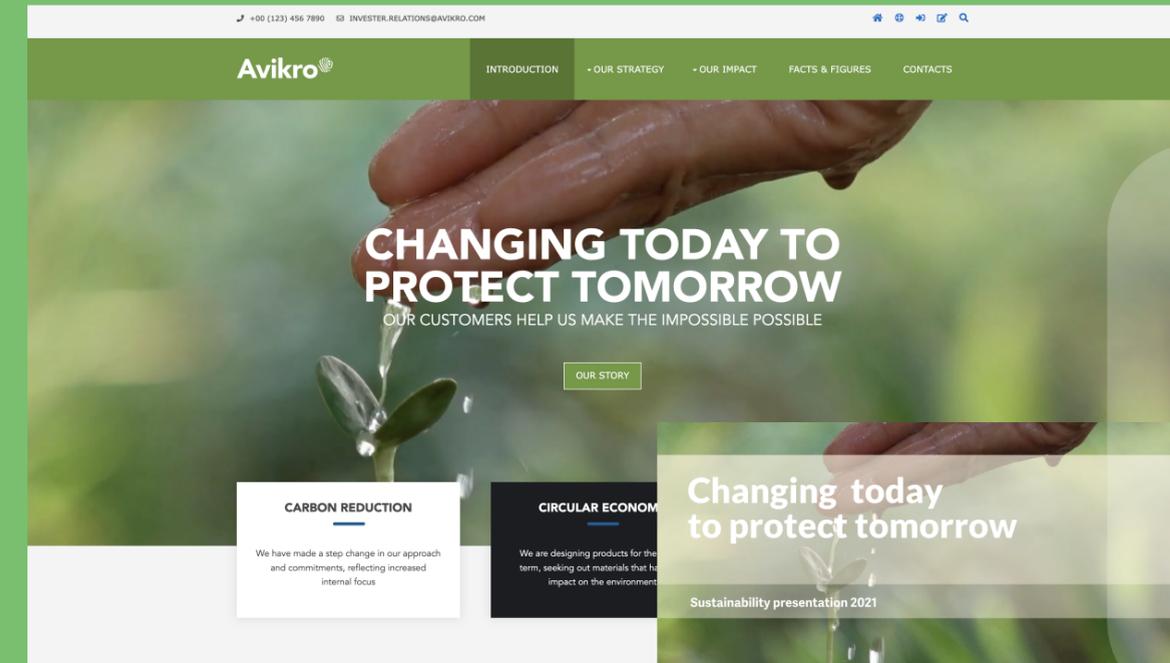
Many of our partners are already exploring our **SpreadsheetsAPI** that is allowing them to manipulate data in Workiva from their own applications.

Our **Structured Content Management** development will allow us to keep variations of content enabling short, mid and long form story telling.

With over 500+ employees in R&D alone, innovation, creativity and assurance are the norm at Workiva.

...we are ready today

ESG website



ESG presentation



ESG report



ESG mobile

More information

Workiva's Essential Course for designers

This course is available for any designer wanting to learn more about designing in a multi-channel way. The course is split into three short modules and covers all the basics to make sure your project is successful, on time and enjoyable!

Starting off the right way for the best results [\[link\]](#)



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



Workiva: the multi-channel design platform [\[link\]](#)



TO GET THE BEST **DESIGN EXPERIENCE**
LET US TRAIN UP **YOUR DESIGNER**

Designed reporting support hub

Whether designing on the Workiva platform, using InDesign or a mixture of both, Workiva can support you and your designer. [\[Click here\]](#) to access resources created especially for design teams to keep your project looking great and on track.

Contact

Your local regional sales director

<https://www.workiva.com/contact>

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.

workiva