



workiva
Designer
Resource Pack

Edition one



Welcome

Welcome to The Designer Resource Pack from Workiva!

Everything you need in one place

Contents

**Design
Workshops
Series one**

**Design
Workshops
Series two**

**Workshop
Datasheets**

**Design
Resources**

**Production
Cheat Sheets**

**Contacts and
Help**

The designer's workshop - series one

[Series one link](#)

[Other resources for designers](#)

Introduction to the whole process

Workshop No 1 shows a demonstration of the integration between InDesign software and the Workiva platform.

1.1

Advanced workflow

Workshop No 4 is all about the run up to filing together with great tips on last minute editing, complex image methods and switching from web to print

1.4

Design considerations for the web

Workshop No 2 looks at how print design needs to adapt for online viewing.

1.2

All things typographic

Typography is discussed in this workshop so things like widow management, font licensing and justified text when publishing to the web.

1.5

Back to basics guide for designers new to Workiva

This workshop takes everything a bit slower for designers new to multi-channel publishing.

1.3

How to have a great submission

Workshop 6 goes through testing your IDML file, XBRL and report format review leading up to filing.

1.6

The designer's workshop - series two

Series two link

Other resources for designers

Doc setup - starting with InDesign

Workshop No 1 shows how to take content from an existing InDesign file and migrate it to the Workiva platform together with the styles

2.1

[Accompanying datasheet](#)

Exporting XHTML for website usage

Workshop No 6 looks at using Workiva's XHTML for website usage and building further value.

2.6

Justified verses range left

Workshop No 2 discusses the issues around using justified text for online viewing. Tips are shown when justified has to be used in the report.

2.2

IDML testing - plugin and discrepancy report

Workshop No 7 shows how to download and use the Workiva plugin in InDesign and where to find the discrepancy report.

2.7

[Accompanying datasheet](#)

Your first ICML pull

Workshop No 3 shows how to pull your first ICML into a blank InDesign document or into an existing one.

2.3

[Accompanying datasheet](#)

Last minute edits

Workshop No 8 shows what do to if you have major or minor edits close to filing time.

2.8

Managing RGB and CMYK colours

Workshop No 4 is for those designers needing to produce the XHTML document but also a document ready for print.

2.4

[Accompanying datasheet](#)

All things around filing

Workshop 9 discusses everything around filing from a design perspective and what filing an XHTML document means for designers

2.9

Client review

Workshop No 5 is all about collaboration and review - outline labels, how to leave and receive comments, creating milestones and blacklining.

2.5

Extending the inline viewer

Workshop No 10 is about how to adapt the open source viewer to capture brand and add further functionality.

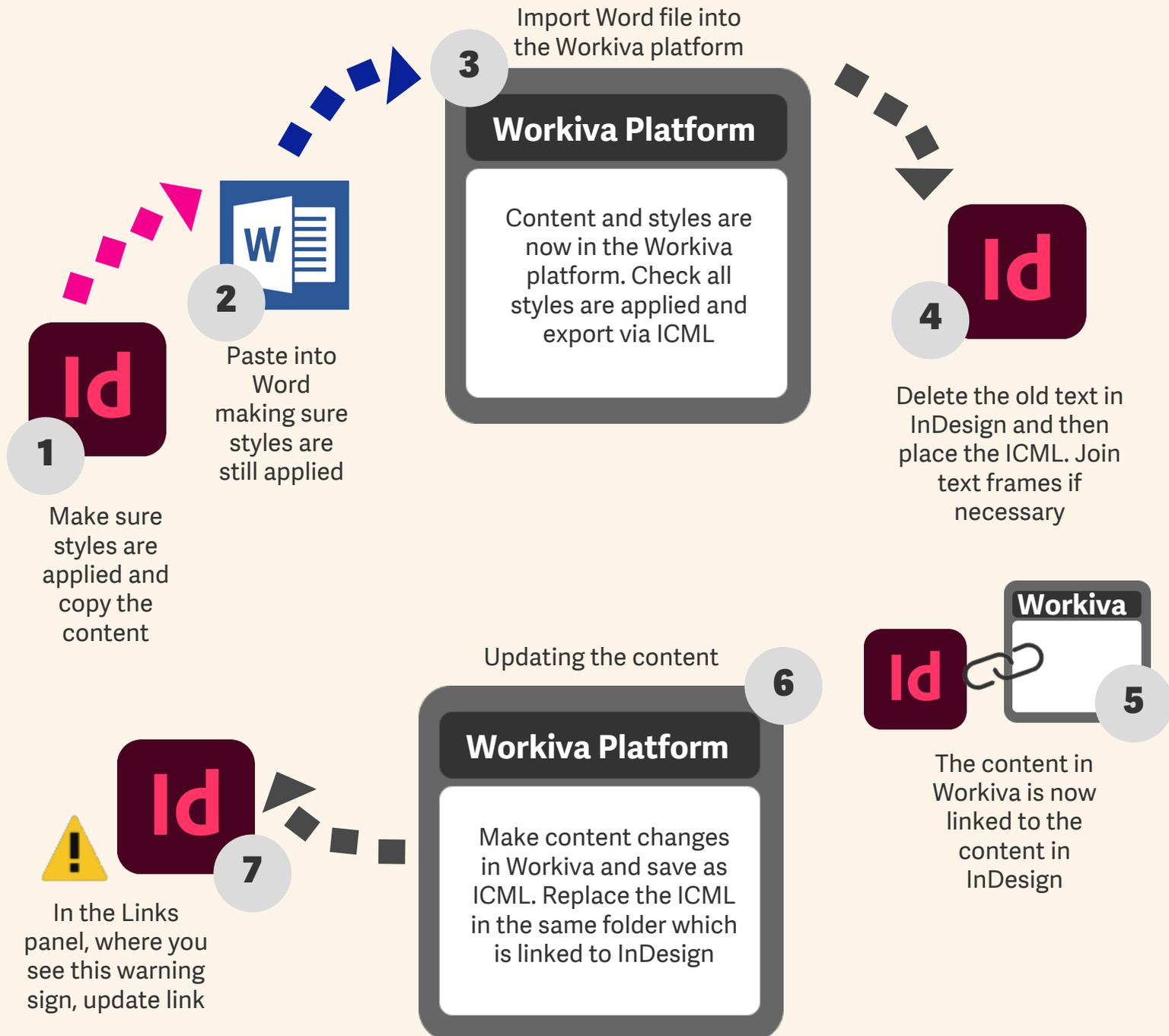
2.10

Document setup - Starting with InDesign

Datasheet to support [Workshop 2.1](#)

This datasheet shows how to take content from an existing InDesign file and migrate it to the Workiva platform together with the styles.

If you want to get content and styles into the Workiva platform follow the steps below. Make sure all styles are applied in each process. After the first ICML has been imported into InDesign and style attributes changed, these changes will persist after subsequent ICML pulls.

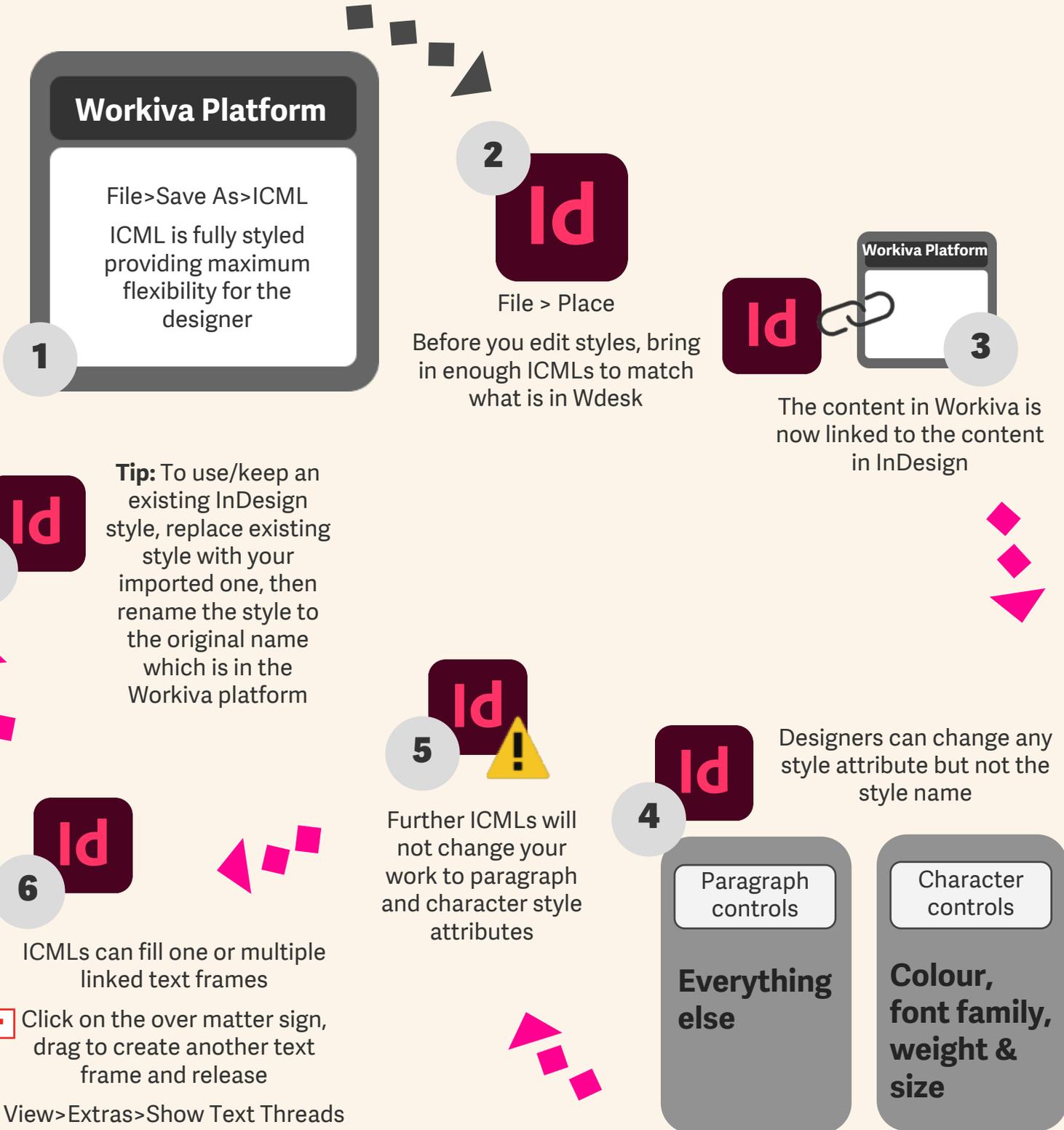


Important: Avoid PDF to Word conversion

Your first ICML pull

Datasheet to support [Workshop 2.3](#)

This datasheet shows how to pull your first ICML into a blank InDesign document or use an existing one.



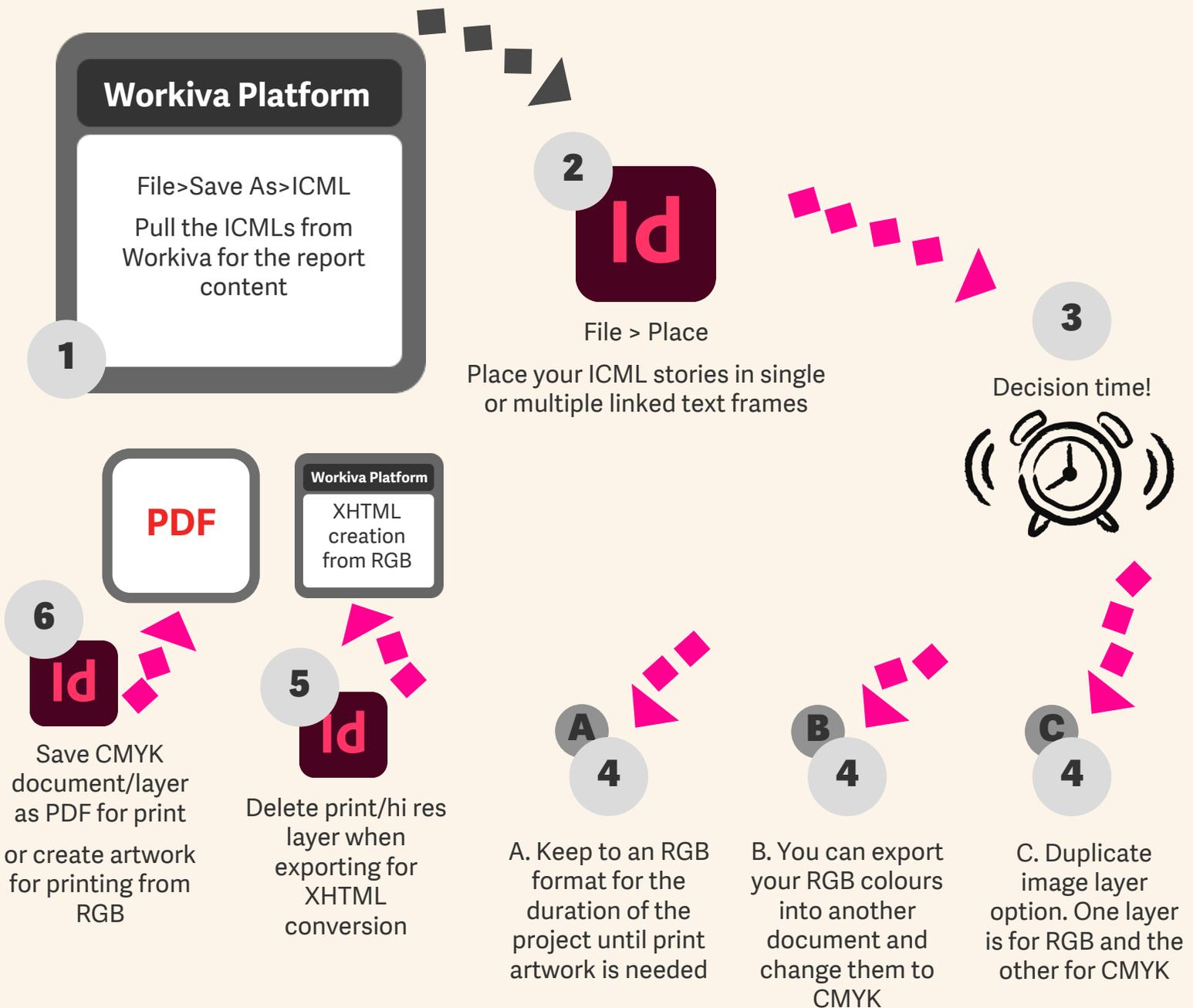
Managing RGB and CMYK workflows

This datasheet shows how to manage both RGB and CMYK workflows. This datasheet accompanies workshop number 4 and is for those designers needing to produce the XHTML document but also a document ready for print purposes

Datasheet to support [Workshop 2.4](#)



RGB is the only colour format supported on the web. Workiva uses RGB colours.



IDML testing - InDesign Plug-in

Datasheet to support [Workshop 2.7](#)

1

Workiva Support

Go to Workiva support [here](#)

Download and install InDesign plug-in

2



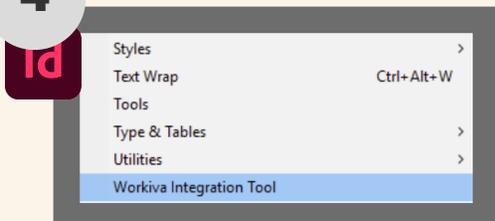
If you get a warning, go to System preference>Security and privacy then Allow

3



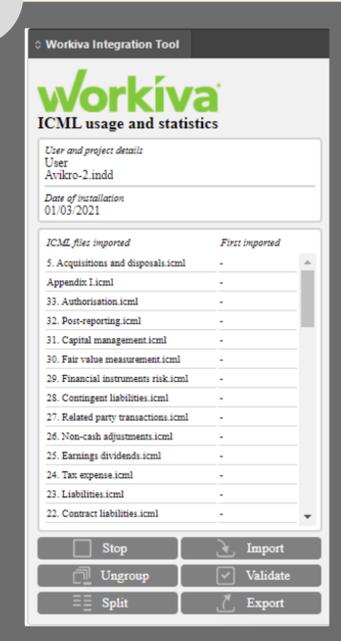
Restart InDesign

4



Find the plugin at the bottom of the Window panel

5

Workiva Integration Tool

workiva
ICML usage and statistics

User and project details
User: Avikro-2.indd
Date of installation: 01/03/2021

ICML file imported	First imported
5. Acquisitions and disposals.icml	-
Appendix 1.icml	-
33. Authorisation.icml	-
32. Post-reporting.icml	-
31. Capital management.icml	-
30. Fair value measurement.icml	-
29. Financial instruments risk.icml	-
28. Contingent liabilities.icml	-
27. Related party transactions.icml	-
26. Non-cash adjustments.icml	-
25. Earnings dividends.icml	-
24. Tax expense.icml	-
23. Liabilities.icml	-
22. Contract liabilities.icml	-

Stop Import
Ungroup Validate
Split Export

Stop

This start/stop function looks at your ICMLs

Ungroup

This ungroups all your grouped items in one click

Export

Easily export IDML here. Good idea to Validate first

Validate

This checks your document against common errors. Use before IDML export

Import

Keeps track of your ICML imports

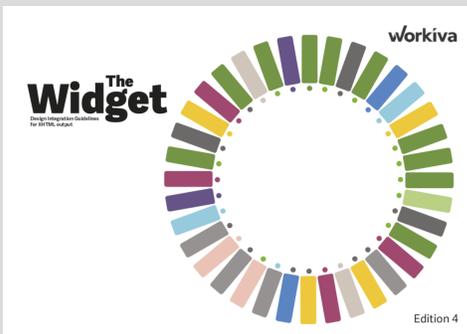
Split

This splits your text frames in one click

Design reporting resources

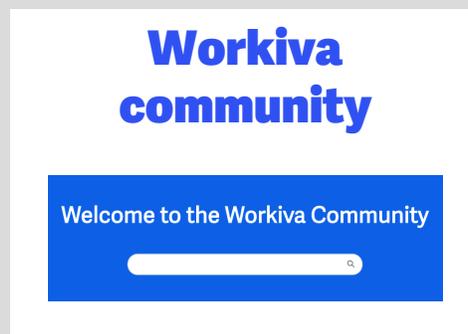
The Widget

With all processes, best practices can help ensure a smooth journey. We have created guidelines to help support our users and designers through design reporting with Workiva.



Workiva community

Find help articles and community posts in the Workiva Support portal.



Fonts

Supported fonts

Workiva has numerous ways to customize documents to suit your needs, allowing you to meet the standards and guidelines of your company. Among these is the ability to use different fonts.

Find available fonts [here](#)

Quick guides for designers

If you're at the beginning of your process and looking for a quick guide as you get more familiar with Wdesk and Design Reporting in Wdesk, start here with our Quick Start Guides!



Design Matters - Series 1-1

Here we explore getting the job done from the people who actually have done it – 266 pages full of graphs, maps, images and tables. See how it is done the Workiva way together with AngloAmerican and their design agency SalterBaxter!



InDesign Plug-in

The Workiva Integration Plug-in (InDesign Plug-in) is a tool that can be used to help InDesign users prepare to bring back content back into Workiva. When bringing content back into Workiva, it will be converted from IDML to XHTML. Full details [here](#).

Go to the [Workiva marketplace](#) for the ESEF starter pack

Production Cheat Sheet

IDML > XHTML

This cheat sheet assumes that below is already done:

- All bitmap images are .png, .jpg, .gif, are 72 or 144 dpi, RGB, and are cropped to the containing frame.
- All vector graphics are SVG format and exported from Illustrator with outlines and use RGB colours.
- All assets are to be embedded in the InDesign document.
- Make sure all styles are web compliant and not contained in folders.
- Make sure you only use one level of master page. Multiple master pages can be used but must be styled in a compliant way.
- Make sure all colour swatches are RGB.
- Do not rename fonts from their original.
- Make sure your client has the web usage rights to any fonts they are using. If they are using fonts in the Workiva platform, they are covered.
- If you are using grep styles, make sure the regular expressions are applied via the find and replace function before you do your conversion. This will depend on what the grep styles are trying to do.

Step 1:

Make copy of document. This is a disruptive process.

Step 2:

Unlink all ICMLs.

Step 3:

Split all linked text frames with either the Split story script built into InDesign or the feature on the integration tool.

Step 4:

If you haven't created a package, do so now. You only need the IDML and the fonts. This will become your master export folder.

Step 5:

If you are using fonts not on the Wdesk platform, you will now need to package your IDML and your font package into a single zip file.

Step 6:

Upload this zip file using the Create button in Wdesk to convert IDML to XHTML.

NB: You only have to create the package once as subsequent IDMLs can be saved to that folder.

Please try to make sure you validate your document using the InDesign Integration tool.

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.

Production Cheat Sheet

Tables

- Due to the limitations of ICML, table width and height cannot be changed in InDesign. Therefore, make sure these are set correctly in the Workiva platform.
- Margins and gutters should be the same in Workiva and InDesign before you start document setup.
- Workiva exports one table style.
- The design of content within table cells is controlled by Paragraph, Character and Cell styles
- Workiva does not have cell styles. Cell styles are created based on the look and feel in Workiva and exported via ICML.
- To style a table uniquely, isolate the table in the Workiva platform and add something unique like a light tint background. This will create a unique set of editable cell styles in InDesign.
- Ignore coloured brackets - these do not hinder design. These are placeholders for the XBRL tags.
- Row heights of tables can differ between InDesign and XHTML. Please use the NoRule style to control the padding top and bottom of all cells globally and adjust individual cell styles to be more specific.

Graphs

- All Workiva graphs will be exported via ICML. They will be named the same as the section name where they exist in Workiva followed by .svg.
- Export the ICML section containing the graph.
- Place the SVG into InDesign like you would place an image.
- Designers can add extra lines or shapes on top of the linked graph to enhance look and feel if desired.
- Chart content cannot be changed in InDesign. Changes must be made in Workiva.

Contact and help

Your primary contact for platform questions is your Customer Success Manager

For design queries, please contact design-support@workiva.com

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.