

# Tips and Tricks to Edit your Document in Workiva.



**LABRADOR**

Transparency by design

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## Labrador and Workiva

**Our Partnership enables us to design your disclosures in the software you use.**

**[Learn more about Annual Reports, ESG Reports and Proxy Statements prepared by Labrador in Wdesk.](#)**

### About Labrador

We help companies communicate effectively.

Our experienced and passionate team is composed of attorneys, designers, project managers, thinkers and web developers. We collaborate together around a process that encompasses drafting, editing, designing and publishing across all digital and print channels.

We are thrilled that communications prepared by Labrador have contributed to trustful relationships between our clients and their readers, whether investors, employees, or other stakeholders.

In turn, our commitment to our clients has resulted in meaningful long-term relationships with some of the most respected public and private companies in the world.

### About Workiva

The Obvious Choice for SEC Reporting.

Why do 8 out of 10 top banks and a majority of the world's biggest companies rely on Workiva for their SEC filings? Because they know we improve data accuracy and increase productivity. We're the company that helps you simplify 10-Qs, 10-Ks, 8-Ks, Section 16, proxy statements, tax disclosures, and 350 other types of SEC forms with a single cloud solution.

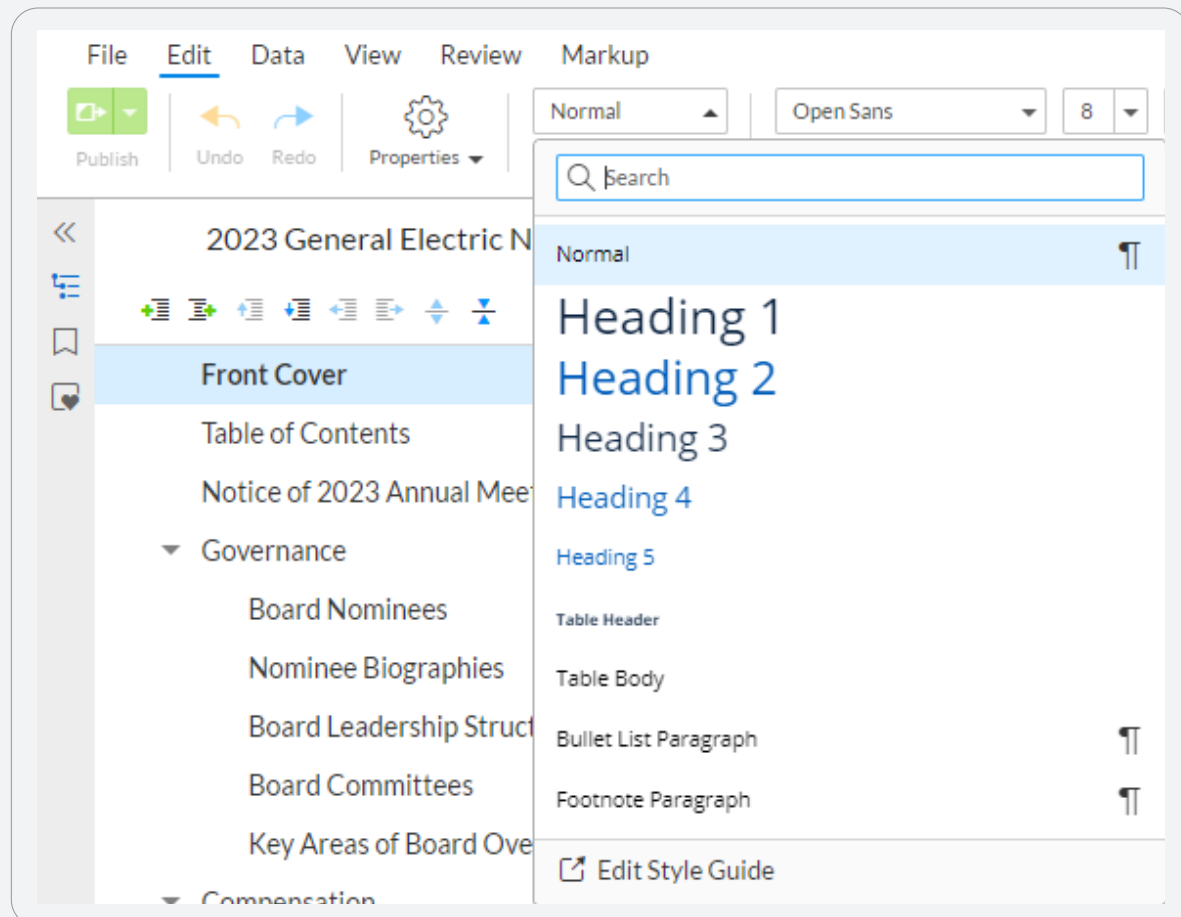
When businesses need '34 Act filing services they can count on, they look to Workiva. When they want fast, accurate, and reliable XBRL® tagging, they find us. When they need to complete 20-Fs but have 20 questions, they get Workiva. All because they want to have strategy sessions, not data debates. That's what connected reporting can do.

# Using Style Guide

“Style Guide” contains all the styles of each element in the document including Title, Body, Table body/header, unordered list (Bullets, Square etc.) and ordered list (Numbered, Letters etc.). Use Style Guide to apply uniform formatting by highlighting text and selecting a style from the menu.

Style Guide can be accessed in the Edit ribbon.

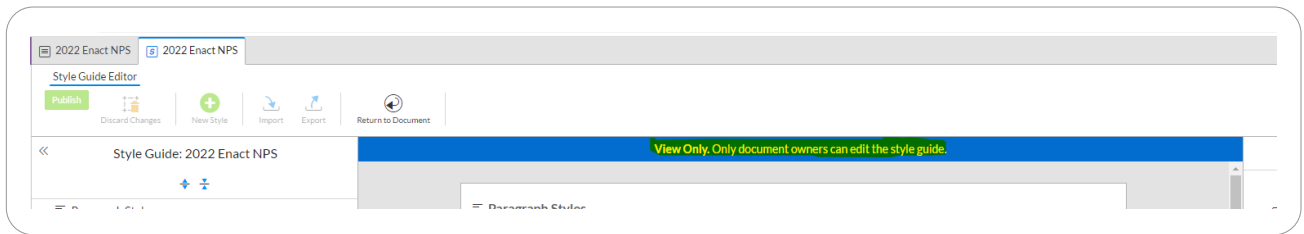
**NOTE:** It is important to use the Style Guide built by Labrador to maintain consistency.



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## Who can create or modify the document's Style Guide?

Only the **document owner** can modify the document's Style Guide. Request for owner access if necessary.



# Paragraph Formatting

Paragraph line spacing, column options, and indentations can be edited from the **Paragraph Properties** panel located at the right panel of the page. You can also use this panel to control how paragraphs interact with page breaks.

The image shows the 'Paragraph Properties' panel in Workiva, which is divided into several sections:

- Layout:** Contains 'Columns' (set to 1) and 'Gutter' (set to 0.5 in.).
- Indentation:** Contains 'First Line' (0 in.), 'Left' (0 in.), and 'Right' (0 in.).
- Spacing:** Contains 'Line Spacing' (set to Percent), 'Percent' (130 %), 'Before' (0 pts), and 'After' (9 pts).
- Pagination:** Contains checkboxes for 'Keep with next', 'Keep lines together', and 'Widow orphan control' (checked).

Two callouts are present:

- A blue box around the 'Columns' field is connected by a line to the text: **Use up to 7 columns in Workiva**
- A blue box around the 'Line Spacing' section is connected by a line to the text: **Use before and after spacing feature to establish desired spacing**

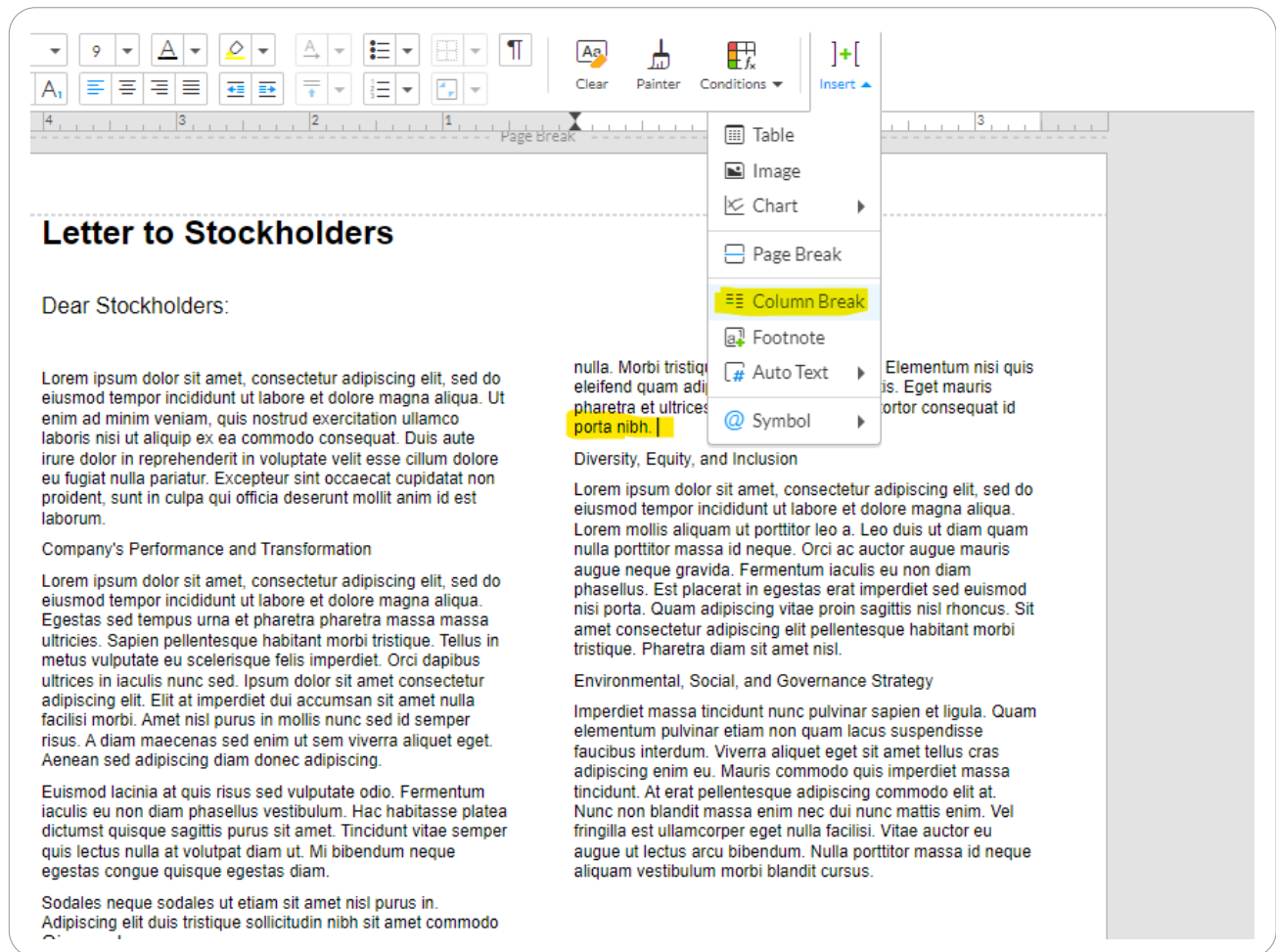
# How to set up multiple columns

To use multiple columns, select the section and set the desired number of columns. Don't forget to set the gutter and make it consistent.

The screenshot displays a document editor interface. On the left, a document titled "Letter to Stockholders" is shown with two columns of text. The text is placeholder content, including sections like "Dear Stockholders:", "Company's Performance and Transformation", and "Environmental, Social, and Governance Strategy". On the right, the "Paragraph Properties" panel is open, showing the "Layout" tab. The "Columns" property is set to 2, and the "Gutter" property is set to 0.5 inches. Other settings like "Indentation" and "Spacing" are also visible.

# How to force a section to flow to the next column when using multiple columns

1. Column breaks can be used to force the next section to flow to the other column.



## 2. Inserting column breaks will create a paragraph mark at the top of the next column. This should be removed, then necessary line spacing should be fixed if needed.

Dear Stockholders: ¶

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum. ¶

Company's Performance and Transformation ¶

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Egestas sed tempus urna et pharetra pharetra massa massa ultricies. Sapien pellentesque habitant morbi tristique. Tellus in metus vulputate eu scelerisque felis imperdiet. Orci dapibus ultrices in iaculis nunc sed. Ipsum dolor sit amet consectetur adipiscing elit. Elit at imperdiet dui accumsan sit amet nulla facilisi morbi. Amet nisl purus in mollis nunc sed id semper risus. A diam maecenas sed enim ut sem viverra aliquet eget. Aenean sed adipiscing diam donec adipiscing. ¶

Euismod lacinia at quis risus sed vulputate odio. Fermentum iaculis eu non diam phasellus vestibulum. Hac habitasse platea dictumst quisque sagittis purus sit amet. Tincidunt vitae semper quis lectus nulla at volutpat diam ut. Mi bibendum neque egestas congue quisque egestas diam. ¶

Sodales neque sodales ut etiam sit amet nisl purus in. Adipiscing elit dui tristique sollicitudin nibh sit amet commodo nulla. Morbi tristique senectus et netus et. Elementum nisi quis eleifend quam adipiscing vitae proin sagittis. Eget mauris pharetra et ultrices. Nam aliquam sem et tortor consequat id porta nibh. ¶

Column Break

¶

Diversity, Equity, and Inclusion ¶

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Lorem mollis aliquam ut porttitor leo a. Leo dui ut diam quam nulla porttitor massa id neque. Orci ac auctor augue mauris augue neque gravida. Fermentum iaculis eu non diam phasellus. Est placerat in egestas erat imperdiet sed euismod nisi porta. Quam adipiscing vitae proin sagittis nisl rhoncus. Sit amet consectetur adipiscing elit pellentesque habitant morbi tristique. Pharetra diam sit amet nisl. ¶

Environmental, Social, and Governance Strategy ¶

Imperdiet massa tincidunt nunc pulvinar sapien et ligula. Quam elementum pulvinar etiam non quam lacus suspendisse faucibus interdum. Viverra aliquet eget sit amet tellus cras adipiscing enim eu. Mauris commodo quis imperdiet massa tincidunt. At erat pellentesque adipiscing commodo elit at. Nunc non blandit massa enim nec dui nunc mattis enim. Vel fringilla est ullamcorper eget nulla facilisi. Vitae auctor eu augue ut lectus arcu bibendum. Nulla porttitor massa id neque aliquam vestibulum morbi blandit cursus. ¶

¶

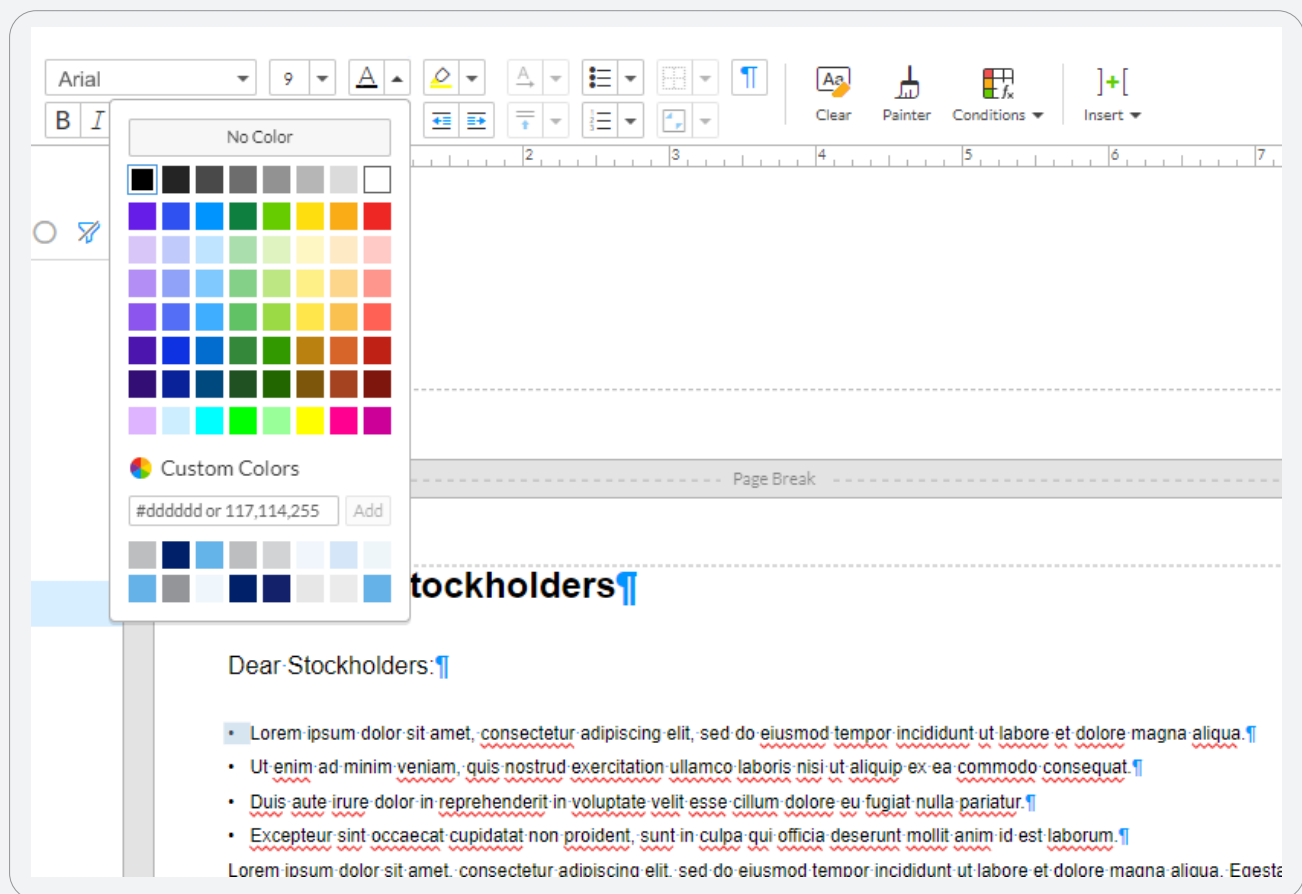


# Managing Lists

## How to manually set color on bullets

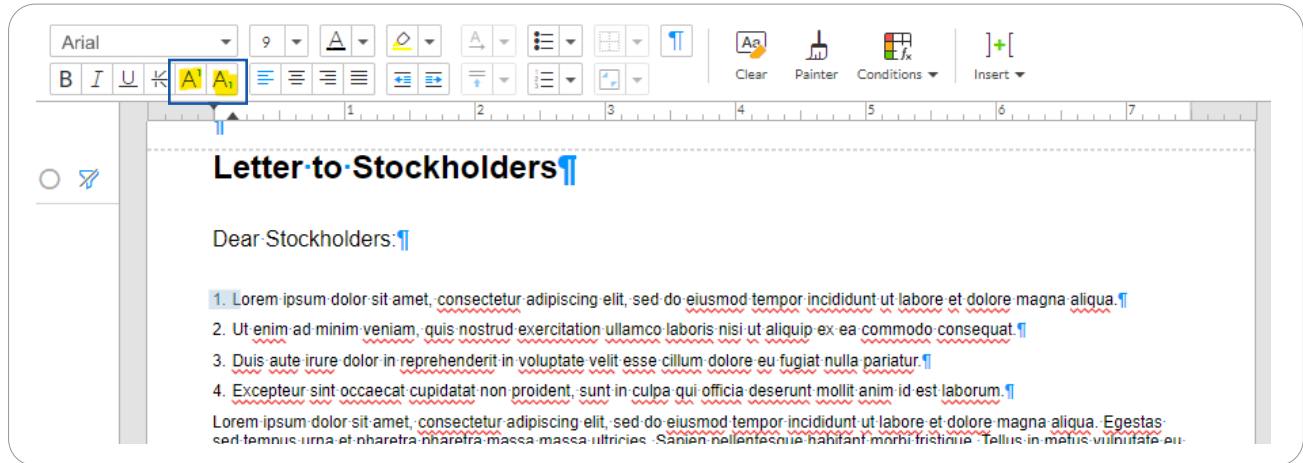
If colors are not set in the List Style Guide, you can customize the color by manually changing it in the document.

1. Select the bullet one by one.
2. Click on the font color icon.
3. Then select the desired color.



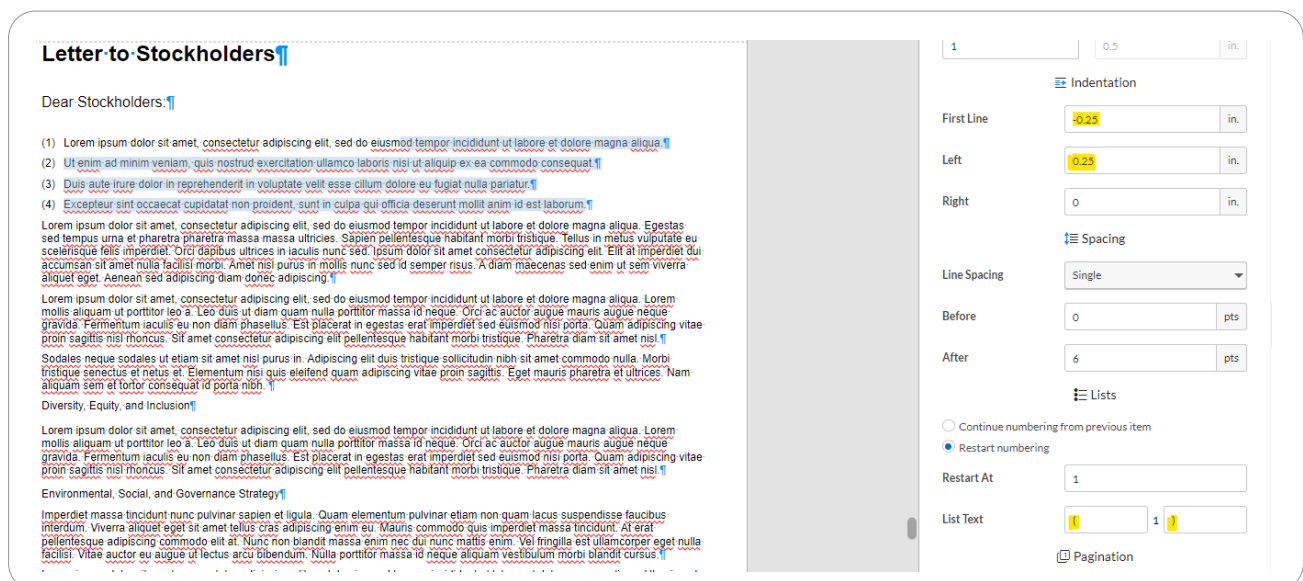
## How to apply superscript on list

To apply superscript on a numbered list, select each list and apply superscript. This cannot be set on list style guide.



## How to set the prefix and suffix of a list

To change the prefix and suffix of a list, select the list and go to paragraph properties and change the prefix and suffix.



## How to restart the numbering of a list

To continue the numbering of the list from the one above it, select the list then go to paragraph properties and select **Continue numbering from previous item**.

The screenshot shows a document with a list of items. The list items are numbered 1 through 9. The paragraph properties panel is open on the right, showing the 'Lists' section. The 'Continue numbering from previous item' option is selected, and the 'Restart At' field is set to 1. The 'List Text' field is set to '( 1 )'.

## How to continue the numbering of a list if it is in a different section

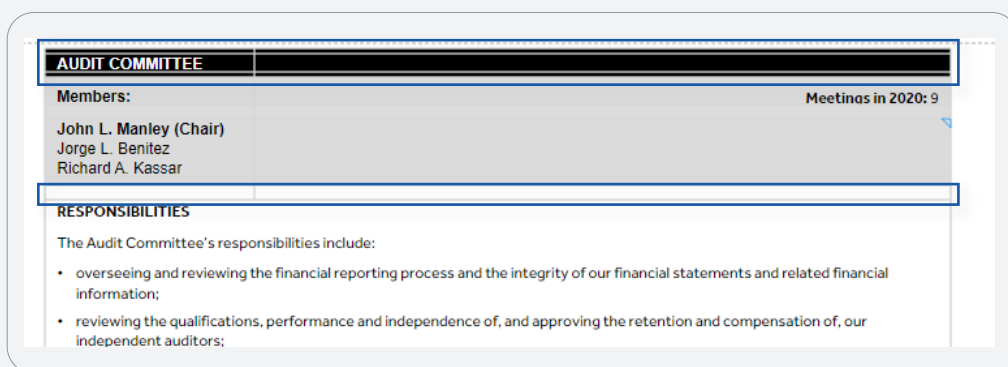
If you want to continue the numbering but the list is from the previous section, you can select restart numbering and input the value of **Restart At** and the corresponding prefix and suffix.

The screenshot shows a document with a list of items. The list items are numbered 5 through 9. The paragraph properties panel is open on the right, showing the 'Lists' section. The 'Restart numbering' option is selected, and the 'Restart At' field is set to 5. The 'List Text' field is set to '( 1 )'.

# Editing Tables

## How to insert linespacing in table

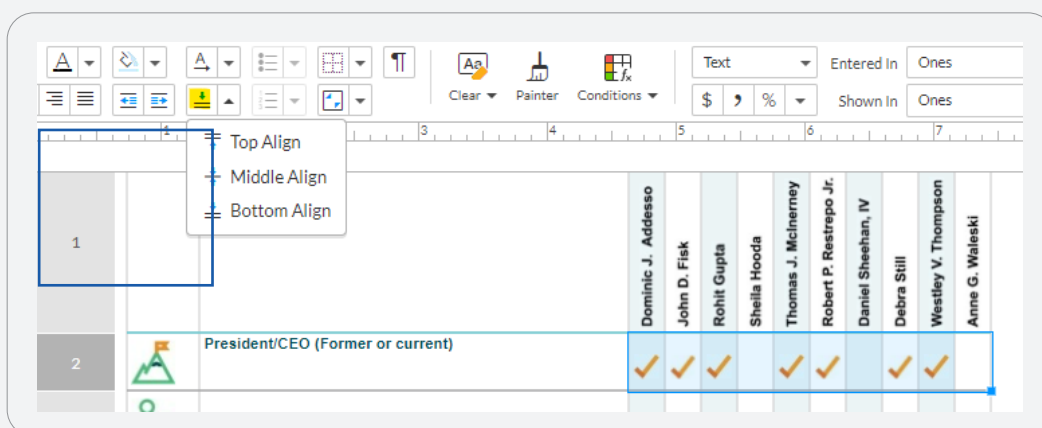
Paragraph spacing (before and after) does not take effect inside a table cell. To achieve the preferred spacing, insert an extra row instead. Then adjust the row height to the desired spacing. See sample below.



The screenshot shows a table with two main sections. The first section is titled "AUDIT COMMITTEE" and contains a "Members:" label followed by a list of names: John L. Manley (Chair), Jorge L. Benitez, and Richard A. Kassar. To the right of this list is the text "Meetinas in 2020: 9". Below this section is a second section titled "RESPONSIBILITIES" which contains a paragraph and a bulleted list of responsibilities. An extra row is inserted between the two sections, providing vertical spacing.

## How to change vertical alignment in table cell

To change the vertical alignment, select cell to be formatted. Then click on vertical align icon on the menu bar.



The screenshot shows a table editor interface. A menu bar at the top contains various icons, including a vertical alignment icon. A dropdown menu is open, showing three options: "Top Align", "Middle Align", and "Bottom Align". Below the menu bar is a table with two rows. The first row is labeled "1" and the second row is labeled "2". The second row contains a "President/CEO (Former or current)" label and a list of names: Dominic J. Adesso, John D. Fisk, Rohit Gupta, Sheila Hooda, Thomas J. Mcinerney, Robert P. Restrepo Jr., Daniel Sheehan, IV, Debra Still, Westley V. Thompson, and Anne G. Waleski. The table is highlighted with a blue border.

## How to add rows on a merged cell

1. To add rows below or above, highlight the row where you will insert additional row.
2. Right Click and select Insert>Row Above or Below.

The following table presents all of the compensation awarded to, or earned by, our executive officers during fiscal 2019 and

Name and Principal Position	Fiscal Year	Salary (\$)	Option Awards (\$) <sup>(1)</sup>	Stock Awards (\$) <sup>(1)</sup>	Non-Equity Incentive Plan Compensation (\$) <sup>(2)</sup>	All Other Compensation (\$) <sup>(2)</sup>	Total (\$)
<b>Charles Giancarlo</b> <sup>(4)</sup> Chief Executive Officer	2019	500,000	-	7,256,878	550,000	-	8,306,878
<b>John Colgrove</b> Chief Technology Officer	2019	320,000	-	3,267,903	-	-	3,587,903
	2018	290,000	-	14,717	-	1,645,814	1,935,814
	2017	250,000	-	11,053	-	444,853	604,853
<b>David Hatfield</b> President	2019	360,000	-	3,693,841	-	-	3,693,841
	2018	320,000	-	11,208	-	3,086,201	3,406,201
	2017	300,000	-	-	-	556,109	856,109
<b>Timothy Ritters</b> Chief Financial Officer	2019	350,000	-	3,806,331	-	-	3,806,331
	2018	320,000	-	4,864,388	-	-	4,864,388
	2017	320,000	-	957,765	-	-	1,277,765
<b>Scott Dietzen</b> <sup>(5)</sup> Vice Chairman and Former CEO	2019	250,000	-	28,042	-	-	278,042
	2018	190,000	-	-	-	-	190,000
	2017	250,000	-	-	-	-	250,000

<sup>(1)</sup> The amount shown in this column does not reflect the aggregate grant date fair value of the stock awards granted to the executive officer during the period.

<sup>(2)</sup> The amount shown in this column does not reflect the aggregate grant date fair value of the non-equity incentive plan awards granted to the executive officer during the period.

3. Select the stub column and merge the cells. Make sure that there is no content on the cells below before merging. The content on the previous cell will be retained.

Name and Principal Position	Fiscal Year	Salary (\$)	Option Awards (\$) <sup>(1)</sup>	Awards (\$) <sup>(1)</sup>	Compensation (\$) <sup>(2)</sup>	Compensation (\$) <sup>(2)</sup>
Charles Giancarlo <sup>(4)</sup> Chief Executive Officer	2022					
	2019	500,000	-	7,256,878	550,000	-
John Colgrove Chief Technology Officer						14,710,000
David Hatfield President						11,050,000
Timothy Rütten Chief Financial Officer				3,178,550	270,281	-
				4,058,057	177,164	-
				501,000	188,555	-

4. The last step is to adjust the height and fix the color of the table.

	Name and Principal Position	Fiscal Year	Salary (\$)	Option Awards (\$) <sup>(1)</sup>	Awards (\$) <sup>(1)</sup>	Compensation (\$) <sup>(2)</sup>	Compensation (\$) <sup>(2)</sup>	Total (\$)
2	Charles Giancarlo <sup>(4)</sup>	2022						
3	Chief Executive Officer	2019	500,000	-	7,256,878	550,000	-	8,306,878
4	John Colgrove	2019	361,887		7,034,048	932,175		8,628,910

# Images in Documents

## How to check the properties of an image in Workiva

Image Properties contains the image name, file extension or file type, and image size. It also allows you to rename the image and download the file.

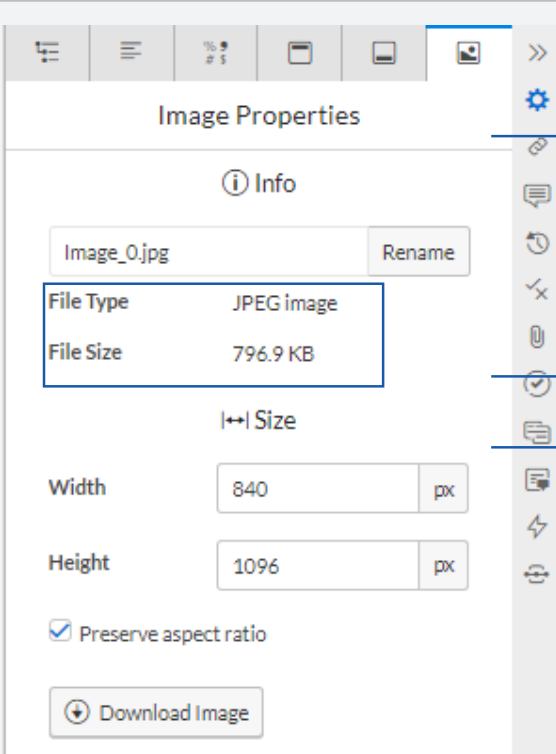


Image file name

Image dimension

**NOTE:** When adjusting the width or height, always tick the Preserve aspect ratio to adjust size automatically.

## Image file types

JPEG and GIF are the only extensions acceptable in SEC Filing, while PNG and SVG are only applicable for non-filing documents (ESG, AR, and SR). **It is important to note that files with PNG extension for filing reports will cause suspension on Test and Live Filing.**

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## SEC image file name requirements

Although Workiva automatically corrects the filenames of the images in your document to meet SEC's filing requirement, there are bugs that hinder the system from doing so. For example, the system will skip fixing the first occurrence of the special characters if there are two of them in a row at the beginning of the filename. If the image is named as \_\_image001.jpeg the system will rename it with \_ximage001.jpeg. The Workiva team is already aware of this bug and is already looking for a solution. In the meantime, kindly follow the SEC file naming requirements to avoid test or live filing suspension.

To comply with the [SEC requirements](#), here are the file naming guidelines that we need to follow:

1. All characters must be in lower case.
2. Can contain both letters (a-z) and numbers (0-9).
3. Filename must start with a letter (a-z).
4. Can contain one each of: a period (.), hyphen (-), and underscore (\_) characters and must end with \*.jpg, and \*.gif. No other characters aside from these three will be accepted by the SEC.
5. Only \*.jpg, and \*.gif are accepted in SEC filing. Any other file extensions will cause suspension in Test or Live Filing (ex \*.png).
6. Filename must not exceed 32 characters including the file extension.
7. Filename should not include spaces.

### Acceptable

abc-image01.gif

abc\_2023q1-image01.jpg

abc2023-nps.jpg

a2023image.jpg

### Not Acceptable

ABC-image01.jpg

abc\_2023q1\_image01.jpg

123\_ABC\_image01.png

\_image01.jpg

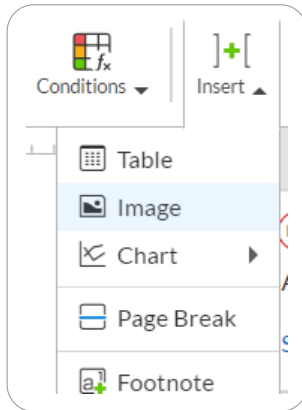


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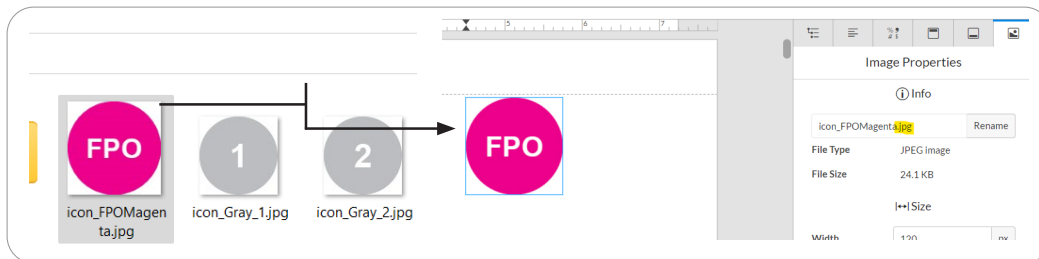
## Correct way of uploading image to the document

Here are the different ways of uploading images to the document.

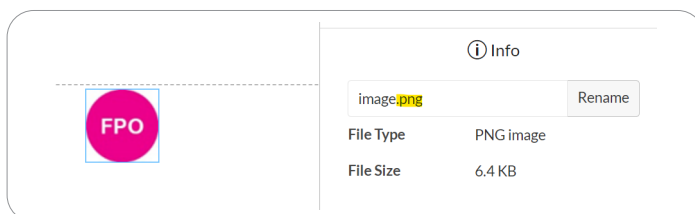
1. The most common way is Insert>Image and select the desired image.



2. The second way is to copy the image from its location and paste to the Workiva document.



**Note:** Do not copy and paste an image from a Word document. If you do this, the image will become \*.png which is not accepted by SEC. Workiva does not prompt a warning when an unacceptable file format is inserted to your document. Make sure to always check the file extension in the image properties.



## Setting a page as an image

For instances when you need to set the whole page as an image, note that the affected page should have its own section. This is because the margins for this page will be set to 0 for all sides.



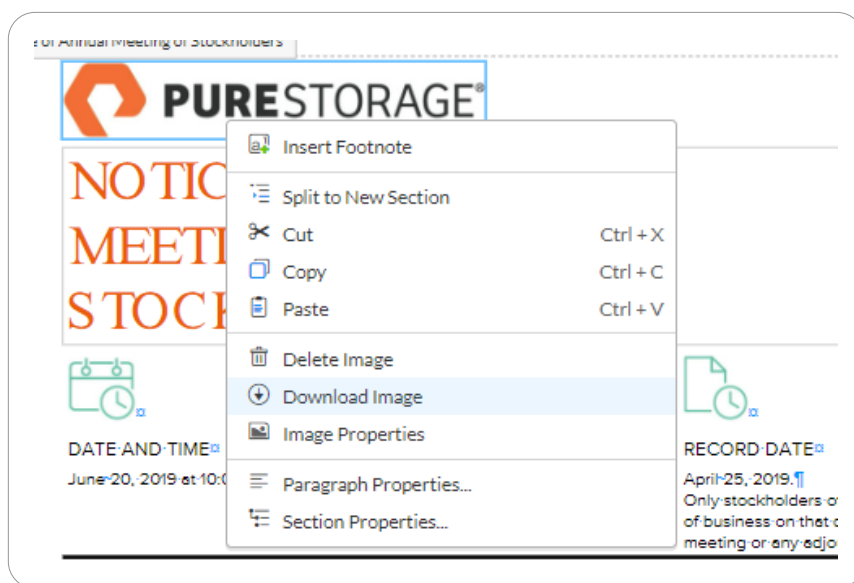
The screenshot displays the Workiva editor interface. On the left, a navigation pane lists sections for 'United Therapeutics NPS 2020', with 'Front Cover' selected. The main workspace shows a document page with the United Therapeutics logo at the top center, the year '2020' in large red text, and the title 'Notice of Annual Meeting of Shareholders and Proxy Statement'. Below the title is a graphic of five horizontal bars of varying lengths, stacked to resemble a staircase. The right-hand side features a 'Section Properties' panel. The 'Layout' section is expanded, showing 'Section Size' set to 'Custom...'. The 'Width' is 8.24931 in and the 'Height' is 10.74931 in. The 'Orientation' is set to 'Portrait'. The 'Columns' are set to 1 and the 'Gutter' is 0.5 in. The 'Margins' section is also visible, with 'Left', 'Right', 'Top', and 'Bottom' margins all set to 0 in. The 'Background' section is also visible, with 'Color' and 'Image' options.

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## How to move an image inside a table

Moving an image inside a table or moving outside a table is not doable in Workiva. The only option is to re-insert the image.

1. Download the image from Workiva. Downloading an image will not affect the quality/resolution of an image.



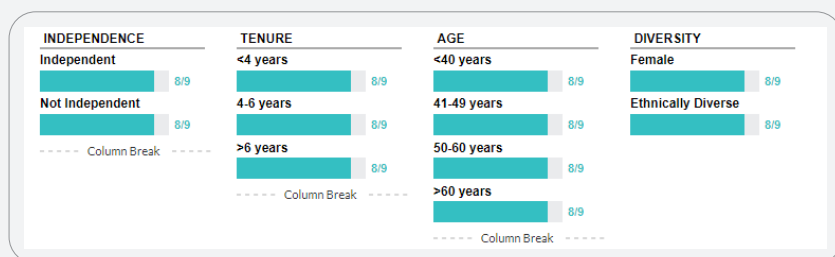
2. Then re-insert to the desired place in Table.



# Managing Live Charts

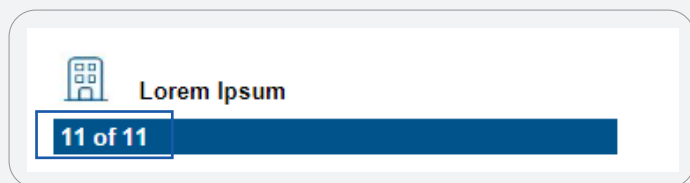
## Can you place a live chart inside a table?

Placing a live chart inside a table is a Workiva limitation so we need to set the section in multiple columns. Refer to **How to set up Multiple Columns** section.



## How to add custom label in a bar chart

1. To add special text on Bar Charts, select the chart and open the chart data.



2. Select the value and go to the cell value formatting.



### 3. Set the suffix of your desired text.

**Formats**

**Value Formatting**

Format ⓘ Number

Entered In Default (Ones)

Shown In Default (Ones)

Formulas ⓘ Full Precision

**# Number Options**

Decimals 0

**Advanced Options**

Show leading zero

Show thousands separator (,)

Use alternate display for zeros

Use parentheses for negatives

Show numbers as word(s)

Show sign on values rounded to zero

Show positive sign (+)

Symbol Align Outside

Leader None

Custom Prefix

Custom Suffix of 11

**Row and Column Size**

Width 75 Fit

Height 16 Fit

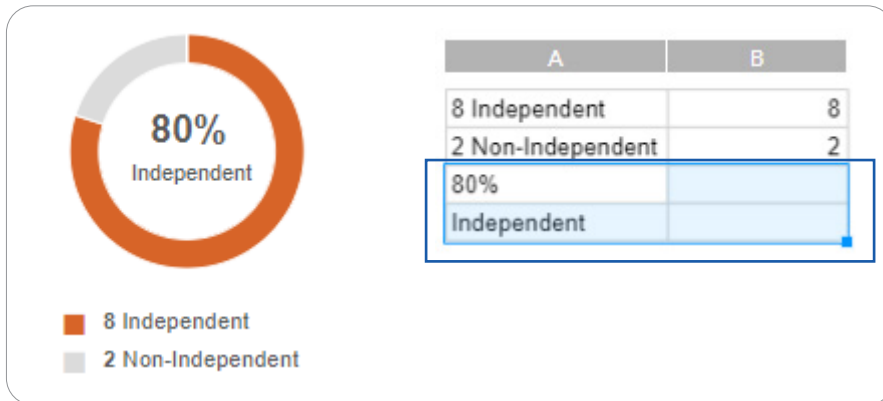
**Leader** None

**Custom Prefix**

**Custom Suffix** of 11

# How to insert label at the center of a doughnut chart

## 1. Add entry on chart data.



## 2. Display the pie label on Chart Properties.

Chart Properties

General

Title

Width: 230 px

Height: 150 px

Spacing: Set Spacing Options

Pie Size: 100 %

Doughnut Hole: 75 %

Pie Rotation: 0 °

Slices

80%

All

8 Independent

2 Non-Independent

80%

Independent

Show Label

Name

Value

Percent

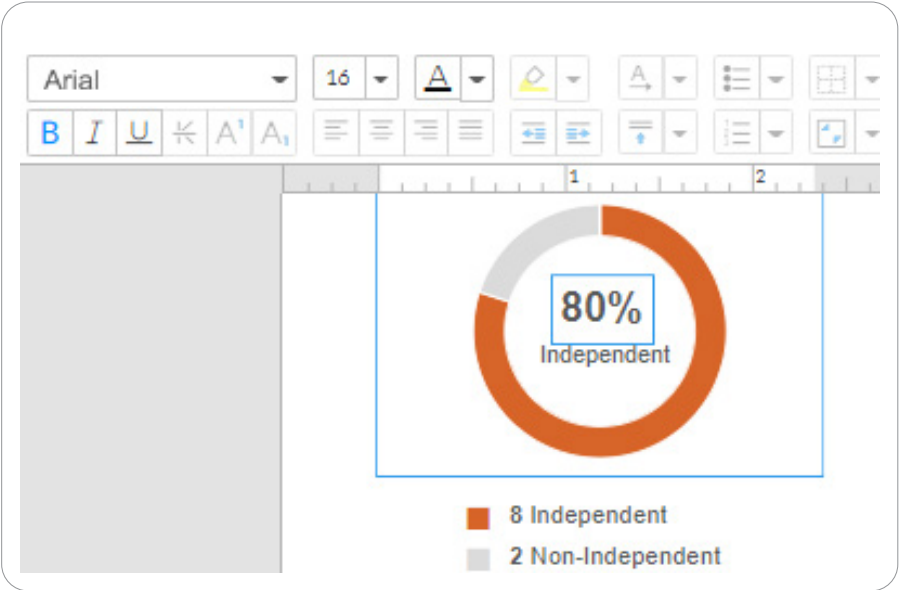
Precision: Auto #

Separator: None

Placement: Auto

Label Width: Auto px

3. Adjust the label to your desired size.



# Frequently Asked Questions

Here are some frequently asked questions.

**Q:** Who is responsible for linking?

**A:** The team can preserve existing links in the document but creating and editing links should be done on the client's end.

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**Q:** What font should I use?

**A:** Workiva has a list of supported fonts that you can use, you can check it here: [Supported fonts – Support Center \(workiva.com\)](#) In case font is not available in your workspace, contact your Workiva CSM to request the fonts to be added in your workspace. See Appendix for font example.



# Appendix

Font samples available in Workiva. List may be updated from time to time to add new fonts. You may also check this link: [Supported fonts – Support Center \(workiva.com\)](https://workiva.com/support-center/supported-fonts)

Aachen*	Ebrima	Livvic*	Prompt*
Abri Barcode 39A	Effra*	Lora	Pridi*
Adelle Sans	Electra LT Std*	LTC Law	Proxima Nova*
Adobe Caslon Pro*	Equip*	Lucida Sans*	PT Sans Pro
Aldine 401 BT	Eurostile LT Pro Condensed	M XiangHe Hei SC Pro+	PT Serif Pro
Alright Sans*	Exo 2*	M XiangHe Hei TC+	Raleway*
Amiri	Fira Sans*	Mada*	Recta
Apollo MT Std	Forum	Malgun Gothic	Red Hat Display
Arial*	Frank Ruhl Libre	Mark OT	Roboto*
Arial Nova*	Franklin Gothic*	Maven Pro	Roboto Slab*
Arial Nova Cond*	Frutiger LT*	Meiryo+	Rockwell MT
Arial Unicode MS	Frutiger Next Pro*	Meiryo UI+	Ronaldson
Asap*	FS Albert*	Memphis LT Medium	Ropa Sans PTT
Ascender Uni	FS Brabo*	Merriweather*	Rubik
Assistant*	FS Emeric	Merriweather Sans	Sabon MT Pro
Atkinson Hyperlegible	FS Me*	Meta OT*	Saira ExtraCondensed Bold
Avenir LT Pro*	Futura*	MHei HK*+	Saira SemiCondensed*

Avenir Next LT Pro*	Gadugi	MHei PRC*+	Sanomat*
Axiforma*	Galano Grotesque*	Microsoft JhengHei*+	Sanomat Semibold
Barlow*	Garamond	MKai HK*+	Sarabun*
Barlow Condensed Medium	Gentium Basic	Mincho B+	Scala Offc
Batang Regular+	Georgia	Mincho E+	Scala Sans Pro*
BatangChe+	Gibson*	Mincho L+	Segoe Script
Bauer Bodoni Pro	Gilroy*	Montserrat*	Seol Sans*+
Bebas Neue	Gill Sans MT*	Montserrat Alternates*	Sora*
Bembo	Good Offc Pro*	MSung HK*+	Source Sans Pro*
Bitter*	Gotham*	MSung PRC*+	Source Serif Pro
Bodoni MT*	Gotham Narrow*	MS Gothic+	Space Mono
Book Antiqua	Gothic A1	MS PGothic+	Stag*
Bookman Old Style	GoudyO1St BT	Muli*	Swis721 BT*
Brush Script MT	Granjon LT Std	Museo*	Tahoma
Butler	Graphik*	Museo Sans*	Tarsus
Cabin	Grotesque MT Light	Myriad Pro*	Tazugane Gothic+
Caecilia LT Pro*	Guardian Sans*	Neue Haas Unica Pro	Titillium Web
Calibri*	Gulim Regular+	Neue Haas Unica Pro Light	Trade Gothic*
Cambria	Helvetica*	Neue Haas Unica Pro Medium	Trajan Pro
Cambria Math	HelveticaNeueLT*	New Baskerville ITC Pro	Trebuchet
Candara	Helvetica Now Text*	NewCenturySchlbk LT	TT Hoves*
Caveat*	Humanist 777 BT*	News Gothic	TT Norms Pro

Celeste	IBM Plex Sans*	News Gothic BT	Tw Cen MT Std
CentSchbook BT*	Impact	Nexa Book	Ubuntu*
Century Gothic	Inconsolata	Nexa Extra Bold	Ubuntu Mono
Clan Pro*	Infra*	Noto Sans	Uniform*
Clearface Gothic LT*	Inter*	Noto Serif	Unit OT
Comfortaa*	Interstate Condensed	Nunito	Unit Slab OT
Corporate A*	ITC Avant Garde Pro*	Nunito Sans*	Univers LT*
Corporate E Light	ITC Charter Com*	OCR A Extended	Univers Next*
Corporate S*	ITCFranklinGothic LT Pro*	Open Sans*	URW Geometric*
Courier New	ITC Lubalin Graph Std*	Optima LT Pro	URWGrotesk
Dax*	Kalam*	Optima nova LT	Utopia*
Dax Pro*	Karla	Oswald*	VAGRounded LT*
DIN*	Kievit Pro	Overpass*	Verdana*
DIN 2014*	Klint Pro*	Palatino	Work Sans*
DIN Next*	Lato*	Playbill	ZapfCalligr BT
DIN Next Rounded LT Pro*	Legacy Sans ITC*	Playfair Display	Zilla Slab*
DFKai SB+	Leitura News*	PMingLiU+	
DM Serif Display	Libre Caslon Text	Poppins*	
Dotum+	Libre Franklin*	Praxis Next	

\* Font available in multiple weights

+ Font supports Chinese, Japanese, or Korean



# About Labrador

We are a creative communications firm offering end-to-end, in-house execution capabilities.

Our experienced and passionate team is composed of attorneys, designers, project managers, thinkers and web developers. We collaborate together around a process that encompasses drafting, editing, designing and publishing across all digital and print channels.

We are thrilled that communications prepared by Labrador have contributed to trustful relationships between our clients and their readers, whether investors, employees or other stakeholders.

In turn, our commitment to our clients has resulted in meaningful long-term relationships with some of the most respected public and private companies in the world.

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