

Remote Annual Reporting During the COVID-19 Crisis



It's no secret that COVID-19 has shaken the corporate landscape. Working remotely, colleagues crave a simple way to collaborate on annual reports while maximizing security—and minimizing stress.

But far too many teams are stuck in the past: sending sensitive information via unsecured emails, constantly churning out new report versions, printing pages for review, and scanning documents to request corrections. At any of these steps, corporate documents could fall into the wrong hands—and critical data could be compromised.

Simply put, old-school measures aren't secure. And they're certainly not the future.

Security shouldn't be a second thought

Tangelo has long been the leading platform for investor relations and finance team collaborations: empowering global enterprises to safely create corporate reports in-house, on the cloud, and in record time.

For us, security always comes first. That's why Tangelo clients operate in a private cloud environment, with secure access provided via two-factor authentication. (No more sharing sensitive information over email.) Once on our platform, contributors enjoy protected access to the content they're authorized to see—so confidential data is safely contained within your remote workforce.

Rather than sharing reports with outsiders for design and revisions, teams can directly edit content and create their own PDFs or microsites. To proactively prevent errors, they can even link figures to Excel spreadsheets with our automatic synchronization feature.

Around the world, hundreds of teams are using Tangelo to reap tangible rewards: heightened security, increased time savings, seamless collaboration, reduced stress, and more.

Here, we'll share how our software allows colleagues to collaborate from anywhere in the world—while keeping risk out of their remote workforce.

Let's get started.

Feel the Tangelo difference

Systems like Microsoft OneDrive, Google Drive, or Dropbox can be good for easily sharing documents. (And Google Docs even has a fun feature that allows users to watch others attack—ahem, *edit*—their text.) But at the end of the day, these platforms leave users juggling multiple files and copies to manage who can handle different report sections.

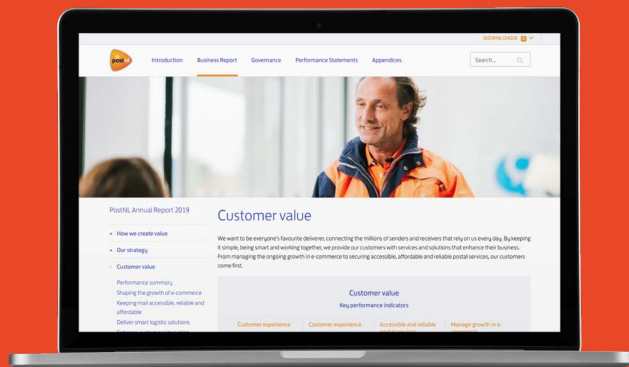
The challenges don't stop there, either. Simply applying your corporate style guide on Microsoft Word or Google Docs is a major struggle—and creating designed content elements is virtually impossible. (Of course, these are both critical components of external corporate reports.)

In contrast, our clients don't work with files (or worse, sets of files). Instead, their annual reports sit in a private cloud

Client Spotlight

PostNL, The Netherlands

In 2019, this postal and logistics e-commerce service provider created their annual report on the Tangelo platform—effortlessly publishing a PDF and website from one single source.



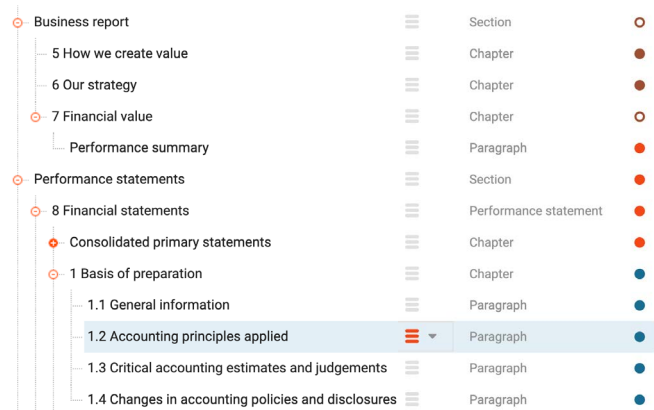
environment on the Tangelo platform: one single source of truth. Multi-user authoring means that different team members can collaborate without issue, while section-level privileges keep the right eyes on the right pages at all times.

Tangelo helps companies combat chaotic, error-prone processes with a secure and productive software solution. On our platform, teams are able to:

- **Keep collaboration front and center.** Easily assign tasks, freeze drafts, create new versions, add comments, track changes, maintain audit trails, and monitor progress—all in a secure cloud-based environment.
- **Seamlessly sync critical data.** No more manually entering numbers into your annual report. With Tangelo, teams can sync their latest Excel files to automatically update figures: effortlessly, accurately, and efficiently.
- **Stop stressing over revisions.** Research shows that 275 revisions are made in the last two weeks before annual report publication. Instead of relying on a design agency for changes (then waiting for them to deliver), companies can make edits directly with Tangelo.
- **Stop duplicating efforts.** Produce print-ready PDFs, interactive websites, and electronic formats—including ESEF—all from a single source.
- **Push publication dates up 2 to 3 weeks.** For one large Melbourne-based bank, that resulted in 1,000 hours of time saved annually.

Ready to dive deeper into these benefits? Let's explore a few different Tangelo features in detail.

Access a singular source of truth



Gone are the days of managing multiple annual report copies on different platforms. With Tangelo, every section lives in one centralized hub—making collaboration easier than ever.

Client Spotlight

Stockland, Australia

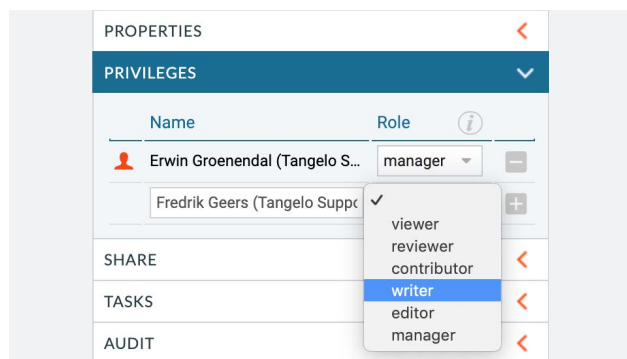
In 2019, this Sydney-based real estate investment trust used Tangelo to create their annual report and property portfolio in-house.



Assign specific section-level privileges

With everyone working in one single document, it's critical to define levels of access. Tangelo allows users to strategically assign section-level privileges across the annual report.

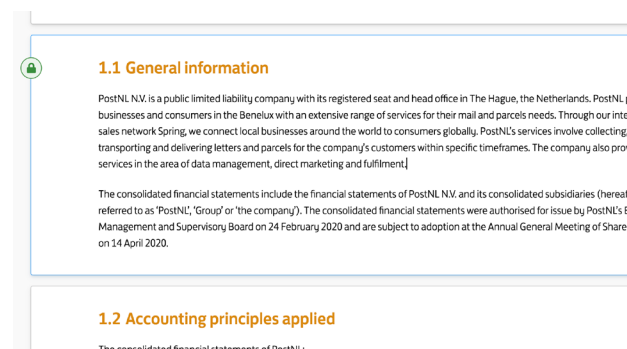
- Contributors can edit existing sections, then set section statuses to "ready"
- Writers can also create sub-sections, then set section statuses to "ready"
- Reviewers can only add comments, then set section statuses to "reviewed"
- Editors can edit and create sub-sections, then set section statuses to "approved"
- Managers can do all of the above—and assign privileges



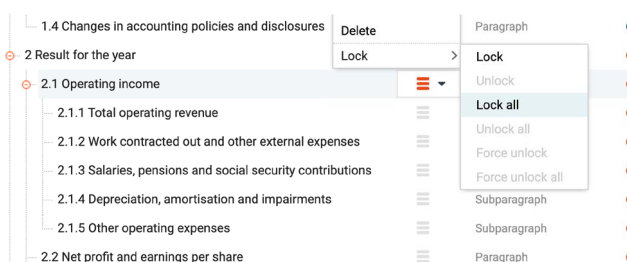
To ensure internal security, users are exclusively able to view the sections they have privileges on—and can only generate PDFs or preview web versions containing those specific sections.

Accelerate progress with multi-user authoring

In Tangelo, users can edit separate sections at the same time—speeding up processes across the board. Sections automatically lock when someone starts editing and release when the user has exited the editor.



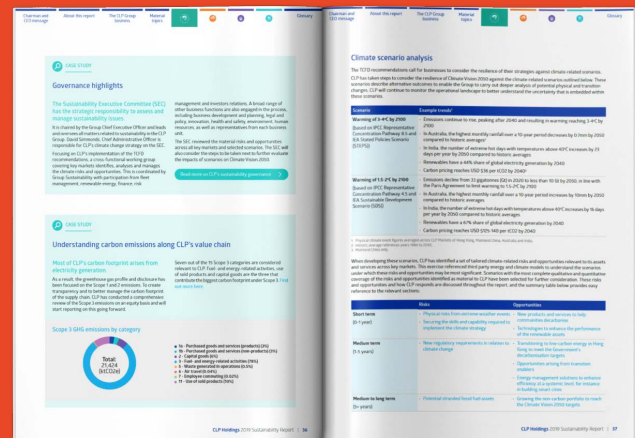
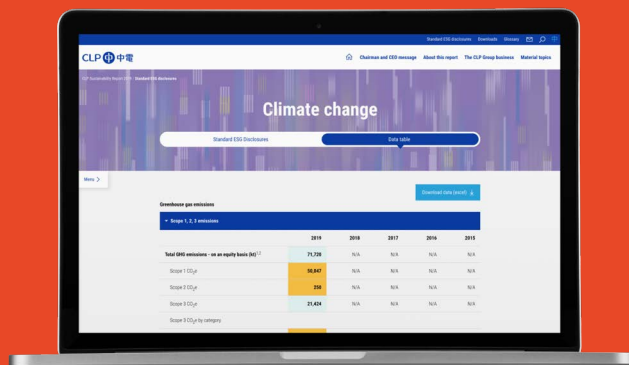
Sections can be locked manually to keep them under control for longer periods of time (and if a user goes AWOL, managers can always "force unlock").



Client Spotlight

CLP, Hong Kong

In 2019, this energy company used Tangelo to take an efficient, digital-first approach: creating the website and PDF version of their sustainability report on our platform.



Create cross-channel content with the click of a button

Instead of hopping between platforms, Tangelo users can streamline the production process by effortlessly generating PDF, web, and ESEF content all from a single source.



PROPERTIES

CONTENTS

PostNL Annual Report 2019	Document	
Focus on our potential	Cover	
Contents	Contents	
Introduction	Section	
1 At a glance	Chapter	



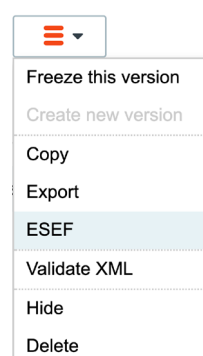
This button generates the PDF (download or print-ready version)—automatically and intelligently applying your chosen design to page flow, page layouts, and element styling.



This button previews the report's website version, created on the fly from the same source as the PDF. Web-only elements and stakeholder tools can be added—like creating and downloading custom PDFs and interactive charts.



This button synchronizes tables, charts, and other numbers connected to data sources in the document—ensuring 100% accuracy and eliminating the need for triple-checking. Only users with the appropriate privileges can connect elements to data sources and sync.



This button generates the European Single Electronic Format (ESEF) filing package from the same source as your PDF or website. Read more about Tangelo's flexible "auto-tagging" ESEF solution [here](#).

AUDIT
▼

Status 'In process' changed to 'Approved'
by Erwin Groenendal (Tangelo Support) on 12/23/2020 11:55

Synchronized with data source
by Erwin Groenendal (Tangelo Support) on 12/23/2020 11:54

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Synchronized with data source
by Erwin Groenendal (Tangelo Support) on 12/23/2020 11:52

Content changed
by Erwin Groenendal (Tangelo Support) on 12/23/2020 11:52

Audit trail

Review
▼

Add comment
▼

Erwin Groenendal (Tangelo Support) - Dec 23, 2020 11:54 ...

Commented

I think we should ...

↩ Add reply

Comments

Urbanisation is ~~leading~~ to a concentration of people living in cities, which increases the demand on logistics and puts pressure on urban infrastructure. At the same time, the ~~population~~ ~~hjhghj~~ is aging and people are living longer at home. With elderly people becoming more reliant on healthcare, there ~~ghg~~ is a shift towards health provision at home, which requires a range of (new) logistic solutions.

Tracked changes are rendered in the PDF

Put process management frustrations in the past

Process management couldn't be simpler with Tangelo. On our platform:

- **Progress is easily monitored**
 While working through the report, contributors and writers can set the status of pages to “ready,” reviewers can set the status to “reviewed,” and editors and managers can set the status to “approved.”
- **Tasks are efficiently assigned**
 Tasks like “write,” “edit,” and “review” can be assigned to single users or groups. For example, when someone sets a section status to “ready,” the assigned reviewers are notified by email (and made aware of any corresponding deadlines).
- **Drafts can be frozen**
 Drafts can be frozen at any time—halting edits and synchronization with data sources. When users are ready to continue working on the report, they can easily create a new version in Tangelo.
- **Comments are easily added**
 Users can add text-level comments throughout the report—and others can directly respond. To prevent errors, reviewers can only make comments (rather than editing content).
- **Changes are consistently tracked**
 Tangelo tracks all user edits—as well as the changes made by synchronizing tables, charts, and other data points. These tracked changes play an important role when reviewing drafts in board meetings.
- **Audit trails are maintained**
Who created this section, and at what time? When was it edited, and by whom? Which team members set this status, and how many days ago was that? Tangelo carefully records critical information so teams can answer all of these questions—quickly and efficiently.

Much has changed. Our mission hasn't

2020 was full of change, but the Tangelo mission remains constant. We're committed to providing clients with high-security, collaborative corporate reporting software—in any climate.

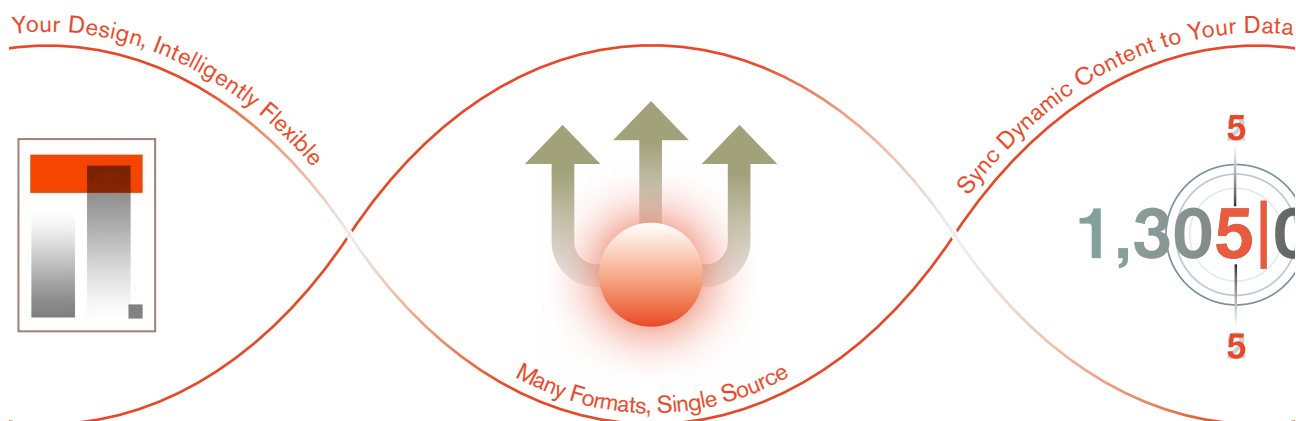
Our platform was always designed for secure online collaboration: powerfully enabling risk-free annual report production from anywhere in the world.

Across industries, top companies are creating award-winning corporate content with our streamlined single-source software solution.

Ready to align your reporting process to a changed world? [Schedule a Tangelo demo](#) today.

Top Tangelo Security Features

- Private cloud environment
- Log on with a password and two-factor authentication—or use your single sign-on (SAML 2.0 and OpenID supported)
- Safely log on from anywhere, or from specific locations only using a firewall for restricted access
- 24/7 monitoring and support
- Continuous backups, and full daily backups stored remotely
- ISAE 3402 Type II-certified procedures and controls, using ISO 27001 cloud providers



Looking for a streamlined way of delivering information to stakeholders? Learn how Tangelo can help you create corporate content: in-house, on the cloud, and in record time.