**Task: Country Reports Layout**

**Including production of charts (VBA), typesetting, Indesign, and final spell checking**

(see for 2018 versions in column “jurisdictions” here: <https://www.financialsecrecyindex.com/en/introduction/fsi-2018-results>)

Steps to undertake:

1. please synchronise these folders from sharepoint to your desktop/computer:

<https://taxjustice.sharepoint.com/Shared%20Documents/Forms/AllItems.aspx?RootFolder=%2FShared%20Documents%2FWorkstreams%2FFinancial%20Secrecy%2FFSI%2FFSI%2D2020&FolderCTID=0x01200002EEE53EB6E7484485A232C998FCE029>

<https://taxjustice.sharepoint.com/Shared%20Documents/Forms/AllItems.aspx?RootFolder=%2FShared%20Documents%2FWorkstreams%2FFinancial%20Secrecy%2FFSI%2FFSI%2D2018%2FNarrativeReports%2FLayout%2DWork&FolderCTID=0x01200002EEE53EB6E7484485A232C998FCE029>

2. Please familiarise with the various subfolders, incl. instructions and templates for indesign; (successively) copy relevant parts from the 2018 folder to the FSI 2020 narrative reports subfolder.

3. decide on most efficient updating path for 133 country reports in indesign

3.a either by

3.a.i: updating a template in indesign, and then inserting 133 times the country names, flags, data, charts, notes/copyright, etc; and in case of narrative reports: narrative text; or

3.a.ii: by using the existing 112 FSI 2018 indesign files, and updating in there only the header, data, charts, notes/copyright, etc; and in case of narrative reports: narrative text; and then deal with the 21 new juris as in 3.a.i; or

3.a.iii: some mix/halfway as possible in indesign (I don’t know if it is possible)

3.b: in any case, we need an updated header in all 133 reports: check instructions and template for headers here: Tax Justice Network Ltd\TJN - Financial Secrecy\FSI\FSI-2018\NarrativeReports\Layout-Work\InDesign-VBA\Logos;

Please take the language for chart 2/ global scale weight from this categorisation: <https://taxjustice.sharepoint.com/:x:/r/_layouts/15/Doc.aspx?sourcedoc=%7BD734758E-5B16-4C64-B14B-3413A8902BB9%7D&file=Updated%20CR-GSW-Charts-2015.xlsx&action=default&mobileredirect=true> (Mirek will provide final Global Scale Weights by end of this week) –

Please exchange the copyright link in both narrative and short reports to lead to this page: <https://www.financialsecrecyindex.com/en/introduction/copyright-license>.

3.c: check for and implement changes in country name spellings – the names should be spelled as in column K of the excel sheet here – you should look for changes at least for Malaysia, United Arab Emirates, USA, Portugal):

<https://taxjustice.sharepoint.com/:x:/r/_layouts/15/Doc.aspx?sourcedoc=%7B4324554D-2E7C-4EA0-93E3-AA31902BC9EB%7D&file=List2020.xlsx&action=default&mobileredirect=true>

3.d: bear in mind that we have ca. 21 new countries, for which no old narrative reports available. Check out the full list of reports to be produced here:

<https://taxjustice.sharepoint.com/:x:/r/_layouts/15/Doc.aspx?sourcedoc=%7B4324554D-2E7C-4EA0-93E3-AA31902BC9EB%7D&file=List2020.xlsx&action=default&mobileredirect=true> (ideally open always in sync’ed version on your desktop)

New juris: column N, if Y

Narrative reports (55 in total): in column O, if Y

If possible (space available) please integrate the coffers logo also into the long narrative reports (currently it is only in short narrative reports)

3.e: Please pay special attention to the co-branded narrative reports (in 2018: some of the African narrative reports, with TJN-Africa; and Germany; in 2020: adding for latin american countries Latindadd and RJF logos – tbc).

4. (subject to decision in 3): prepare VBA for creation of charts for the reports above (make sure you adjust the name spelling changes of countries here in line with 3.c):

Check out instructions: TJN - Financial Secrecy\FSI\FSI-2018\NarrativeReports\Layout-Work\InDesign-VBA

Check out video:

maybe you can watch first part of it and feel free to consider if you think this is not for you...if that is case, please let Markus/Moran know asap, and we ll find a solution

<https://taxjustice.sharepoint.com/_layouts/15/Lightbox.aspx?url=https%3A%2F%2Ftaxjustice%2Esharepoint%2Ecom%2FShared%20Documents%2FWorkstreams%2FFinancial%20Secrecy%2FFSI%2FWebinarTeachings%2F20171013%5FVBA%2DIndesign%2DTraining%2Emp4>

5. (subject to decision in 3) Start producing the new countries short reports (analysing columns N and O in excel of 3.d) even in absence of live data (use mock data for testing if all tallies/works well).

6. (subject to decision in 3) Start producing the new countries narrative reports templates/reports, using mock data and language in case no final data there yet; then proceed with other signed off narratives (see point below):

when inserting narratives for ca. 55 into templates in Indesign:

Lucas: With regards to typesetting, it is possible to broadly organise the paragraphs and endnotes, so that they are maintained when the Word document is inserted into a text box. However, any graphics or charts, and any info "box". Any Link that is in the original word document is maintained when importing the word doc into Indesign.

I dont think we drafted any further guidance materials (apart from the recorded video). With regards to the process of editing, I remember that what was most useful was the Word import. I think the steps where the following: (a) on Word, add any missing footnotes (when link is there but no footnote), and missing links (when footnote there but no link; (b) transform all footnotes to endnotes; (c) save the file and import word document into text box directly. This way I could avoid doing the linking/endnoting on Indesign, which is quite impractical. Over and above this, it s all about adjusting boxes, text, and images (if any) directly in Indesign so that it looks nice 🙂

I tested importing word document and it works, keeping both links and footnotes/endnotes. (see screenshot tutorial below)

7. (subject to decision in 3) Start with creating narrative reports that are signed off (see column T), following sequence of priorities indicated in column U; check out this list of country/narrative reports: <https://taxjustice.sharepoint.com/:x:/r/_layouts/15/Doc.aspx?sourcedoc=%7B4324554D-2E7C-4EA0-93E3-AA31902BC9EB%7D&file=List2020.xlsx&action=default&mobileredirect=true>

 please take into account Lucas’ advise on preformatting from above, and test his advise for efficient insertion of text into templates.

You can find the narrative reports that are signed off on content here:

<https://taxjustice.sharepoint.com/:f:/g/ErgoELeI2sFGhowSpjiLA6sBzPLW7oJXT8iilkLB_BQCMg?e=oNkCEr>

Please store all finalised short reports here (both indesign and pdf):

<https://taxjustice.sharepoint.com/Shared%20Documents/Forms/AllItems.aspx?RootFolder=%2FShared%20Documents%2FWorkstreams%2FFinancial%20Secrecy%2FFSI%2FFSI%2D2020%2FNarrative%20reports%2FLayouted%20Short%20Reports&FolderCTID=0x01200002EEE53EB6E7484485A232C998FCE029>

Please store all finalised narrative reports here (both indesign and pdf):

<https://taxjustice.sharepoint.com/:f:/g/El94cPs0guRPoo4RM64OsW8BQj9k7Chz2sbpWYLFGjKoYg?e=f7wsf4>

8. (After 1-7 completed, or if “spare” time in between, e.g. when waiting for new reports/data): Update Barcharts, energy efficiency charts (familiarise with the format/file/template etc):

Do we need them all?

Tax Justice Network Ltd\TJN - Financial Secrecy\FSI\FSI-2018\NarrativeReports\Layout-Work\Website-Charts-Energy-Efficency

(11. If time permits: check KFSI headers FSI 2020 – not sure if any update required):

- check “20171208\_Headers working sheet” in \TJN - Financial Secrecy\FSI\FSI-2018\NarrativeReports\Layout-Work)

- check instructions and examples here: Tax Justice Network Ltd\TJN - Financial Secrecy\FSI\FSI-2018\NarrativeReports\Layout-Work\KFSI Headers

