

Adding Documents with Inline XBRL to a Project

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After tagging a document with XDX and using the Create iXBRL function to create a document with inline XBRL tagging, you are ready to add it to your submission project. If you used one of the Form Assistants to state your project, then the HTML document that contains the instance information for the inline XBRL data has already been added to the project. However, this is not the only document that you must add to the project before submitting it to EDGAR.

Like standard XBRL reports, Inline XBRL documents still rely on the linkbase files to create a complete picture of a company's financial data. The Create iXBRL function will create these linkbase files for you automatically but it does not add them to your project.

First, what are the files that must be added to a submission containing inline XBRL? The table below outlines the different XBRL linkbase documents.

Document Type	Sample Description	Extension	Sample Filename
Primary Document (ie: 8-K, 8-K/A, etc.)	8-K	.htm	form8k.htm
EX-101.SCH	XBRL Schema File	.xsd	xyz-20190930.xsd
EX-101.CAL	XBRL Calculation File	.xml	xyz-20190930_cal.xml
EX-101.DEF	XBRL Definition File	.xml	xyz-20190930_def.xml
EX-101.LAB	XBRL Label File	.xml	xyz-20190930_lab.xml
EX-101.PRE	XBRL Presentation File	.xml	xyz-20190930_pre.xml

Every filing may not have all of these linkbase documents. For example, an 8-K filing that has no calculation data in it will not have a corresponding Calculation Linkbase file. However, this table will give you an idea of what files you should expect to see for your inline XBRL project.

The linkbase files will be automatically created in the folder on your Virtual File Cloud (VFC) that contains the HTML document.

To add them to your project:

1. Open your project file in the software. If you do not have a project file, [create one using the New function on the File Ribbon](#).
2. Click **Submission > Manage Files > Add File(s)**
3. Select the linkbase file(s) in the dialog. You can select multiple files at one time by holding the **Control** key and clicking on each file.
4. Click **Open**.

5. The **Entry Properties** dialog will appear. The software can automatically detect the document type and description for linkbase files based on their names. You can edit the description or set a comment or edit status for internal review. If you check the *Repeat/Auto-detect for All Entries* option, the software will add the remaining linkbase files without opening the **Entry Properties** dialog for your review.
6. Click **OK**.
7. Repeat steps 2-6 as necessary.

The **Entry Properties** will open for all specified files that have been added. If you selected the option to automatically detect the properties for each file, a summary will appear with information about each file that was added to the project.