# Welcome

# Our members play a key role in the success of all of our activities.

Connecting with other members, sharing your opinion, and having a voice in the strategic direction of XBRL US development projects, research, events and communication are critical to getting the most out of your membership. Your involvement can range from simply participating in the annual meeting or contributing to monthly committee conference calls to sharing staff and technology resources on a development project with XBRL US Labs. Here's how to get started.

#### Set Up Your Member Profile to Gain Exposure

To get started, activate your logon by visiting <u>http://xbrl.us/memberlogin</u>. Click on "Register New Account" and you will be prompted to create a new account which will be available to you in minutes. Once you've registered, you will have access to these resources:

#### **For You**

- XBRL Consistency Suite -
  - Company Filings Analysis, a database of SEC XBRL submissions of XBRLformatted financial statements.
  - Opportunity to resell XBRL Consistency Suite at special member pricing. Email <u>consistencysuite@xbrl.us</u> for more information.
- Member directory
- Presenter profile post your bio for potential speaking engagements
- R & D Updates learn about ongoing activities, many available in early stages for members only
- Subscribe to XBRL International and XBRL US email lists
- Join the XBRL US LinkedIn group

#### **For Your Organization**

- Post your organization's profile
- Upload your news to be published on the XBRL US web site
- Post and manage service and tool offerings
- Promote your EDGAR Filer tool or service through the XBRL US Tools and Services Matrix
- Promote your analytical tools
- Submit an event for posting to the XBRL US event calendar

#### Get Visibility for You and for Your Company

- Promote your corporate and individual involvement through our home page "Member in Focus" section by sending us a high resolution photo and 25-word quote about "Why XBRL?" and "Why XBRL US?".
- Participate in the XBRL US webinar series which focuses on preparing issuers for XBRL creation. Members typically serve as expert speakers on the presentations which draw from 80-150 registrants every month.
- Become a trainer at one of our SEC Filer training sessions held around the country.
- Find out how you can promote your tools and services at the XBRL US National Conference and learn about special member discounts on registration and sponsorship.
- Raise awareness for your organization and offerings through the XBRL US monthly
  newsletter and webinar series that reach thousands of individuals in many different
  arenas.

#### Share Your Expertise through Committee Involvement

Two steering committees are up for election in the fall of each year - the **Communications & Services Steering Committee,** which works to engage members and the public at large, and the **Domain Steering Committee,** which oversees taxonomy development to meet the business needs of key markets in the U.S.

The *XBRL US National Conference Advisory Committee* convenes in late spring/early summer to oversee the programming, communication and planning for the XBRL US National Conference that takes place in the fall each year. Working groups and stakeholder groups for specific initiatives are established on an ad hoc basis to meet the needs of the marketplace, e.g., the Corporate Actions Stakeholder Group, US GAAP Taxonomy Working Group, Best Practices Working Group.

#### **Other Ways to Maximize Your Membership**

- Send us other contacts within your organization who want to be involved you can send us new contacts at any time through the course of your membership. We'll add them to the XBRL US and XBRL International email lists to make sure they get news and updates. You and any other contacts listed on the XBRL US member application will automatically be added to these lists.
- Register yourself and others to receive the complimentary XBRL US Newsletter and XBRL Global print magazine. The links to both can be found on the <u>xbrl.us</u> home page.

Visit <u>http://www.xbrl.us/memberlogin</u> for more information.

# Influence

#### Share your expertise and make your voice heard.

Member involvement in our two primary steering committees, the Communications and Services Steering Committee and the Domain Steering Committee, is critical to moving the XBRL standard forward. These committees help to set the direction for marketing and publicity, and for taxonomy research and development, respectively. Elections for these two critical committees take place in the early fall.

#### **Communications and Services Steering Committee**

The *Communications and Services Steering Committee* facilitates the adoption of XBRL by the business reporting supply chain by engaging members and the public at large in efforts to increase the relevance of XBRL and build community among a diverse audience.

#### **Domain Steering Committee**

The Domain Steering Committee's primary goal is to oversee the development of taxonomies to meet the business reporting needs of key markets in the United States. Responsibilities of the **Domain Steering Committee** include reviewing and establishing the business requirements for the XBRL specification, participating in the development of global taxonomy architecture best practices, and participating in the taxonomy development and approval processes.

Another influential and important committee is the *XBRL US National Conference Advisory Committee.* Each year, XBRL US hosts its National Conference, typically in the fall. This committee convenes in late spring/early summer to oversee the programming, communication and planning for this event which also includes our Annual Meeting and committee meetings.

XBRL US recently introduced the *Best Practice/Data Quality Committee* which seeks to establish standards around the use of XBRL for specific reporting domains to enable greater consistency and accuracy in XBRL data. The committee is charged with identifying and reaching agreement on best practices in the creation of XBRL-formatted financial statements from public companies reporting to the Securities and Exchange Commission (SEC).

Other working groups and stakeholder groups for specific initiatives are established on an ad hoc basis to meet the needs of the marketplace. Examples of these groups include the Corporate Actions Stakeholder Group and the US GAAP Taxonomy Working Group.

To learn more about how to become a part of these committees, email <u>membership@xbrl.us</u>.

Visit <u>http://www.xbrl.us/memberlogin</u> for more information.

XBRL US is the national consortium for xml business reporting standards.

# Learn

# Gain early access to information on development and research.

XBRL US Labs is the research and development arm of XBRL US, leveraging the XBRL US platform, methodologies and people through research partnerships. Members have early access to projects underway – find them at <u>http://xbrl.us/research</u> and click on Member Login.

#### **Programs include:**

#### **Corporate Actions – Taxonomy development**

Approximately 200,000 corporate actions including dividends, bond redemptions, and mergers are announced each year by publicly traded companies and other issuers in the U.S. alone. Most of these announcements still require many manual steps, making the process error-prone, time-consuming and costly, and negatively affecting investors across the financial community. To help mitigate the risks and drive down the costs associated with processing corporate actions, DTCC, SWIFT and XBRL US have joined forces to implement a solution. The resulting initiative builds on the work undertaken globally to promote existing ISO (International Organization for Standardization) standards for corporate actions and integrates the benefits of XBRL electronic data tagging technology. A business case has been written and a taxonomy defining approximately 40 corporate actions has been developed and is now available for public review.

#### XBRL Consistency Suite – Analytical tool and SEC XBRL filings database

The XBRL Consistency Suite features an automated tool that performs over 10,000 tests against an XBRL instance document to identify errors and inconsistencies. Public companies and service providers can make corrections to the XBRL document before sending it on to investors and regulators. The XBRL Consistency Suite also includes access to a database of all XBRL submissions, updated every 30 minutes, and an analytical interface that lets companies find concepts used and extensions created by peer groups. All XBRL US members have full access to the XBRL submissions database and analytical interface components.

#### **Brix IPhone App**

Brix delivers data from, and about, corporate financial statements moments after they are filed to demonstrate the power and benefits of XBRL, and to generate interest in the Brix Project, an initiative to improve the usability of XBRL through "crowd source" techniques leveraging the collective expertise of a diverse group of business, information architecture, and technology practitioners. The Brix app enables iPhone viewing, searching, and sorting of XBRL reports and tags. It also uses the "Notification" feature to alert a user when a specific company files an XBRL report, or when a specific tag is used, and offers a one-click email forward of XBRL documents as an Excel attachment.

#### **Programs ahead**

- Proxy statement reporting
- Nonprofit reporting
- Government reporting

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