Compose Print PDF (DRAFT)

Return to Main Print Workflows page

Required Tools:

- Jira Ticket
- BWIP
- SharePoint Folder
- Adobe

Composition Training Recording - Part 1

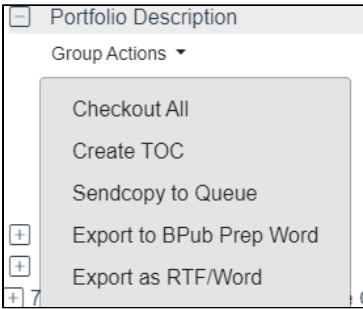Composition Training Recording - Part 2

TABLE OF CONTENTS:

1. **Work is assigned**
   a. Receive a request to compose a Print PDF for shipment
   b. Open the Jira ticket
      i. ie, August Shipment: 574-3rd: Compose Print PDF
   c. Add a Comment
      i. EXAMPLE: Acknowledged
2. **Checkout the files from BWIP**
   a. TOC/Browse
      i. Navigate
      ii. Group Actions
         1. Checkout All

         1. Portfolio Description

            a. Title Page
            b. Portfolio Description
            c. Table of Contents
         2. Detailed Analysis
            a. Make a note of the number of chapters
         3. Working Papers
            a. Table of Worksheets
   b. WIP
      i. Sort
         1. Unit Start
      ii. Service
         1. EXAMPLE: tmip-por
         2. EXAMPLE: tmus-por

        iii. Publication Num
            1. Portfolio-Edition
                a. ie, 574-3rd
        iv. Class Code
            1. 0 = Portfolio Description files
            2. A = Detailed Analysis files

2. **Compose the Title Page in Oxygen**
    a. Title Page and Board of Editors Page
        i. PDF Preview
            1. View to determine what changes, if any, must be made
        ii. Create space
            1. Multiple authors
                a. Insert line breaks around "by" and "and"
            2. Suppress author biographies if more than one page
                a. Highlight paragraph
                b. Select Include
                c. Add Attribute
                    i. Only in
                    ii. !Print (with exclamation point)
                    iii. Add
                d. Repeat Step 2.a.ii.2 for each paragraph to be suppressed
        iii. Ensure "This Portfolio revises and supersedes..." appears at the bottom of the Title Page and contains a first-line indent
            1. Insert line breaks
                a. Paragraph
                b. Line Break
                c. Add Attribute
                d. Only in
                e. Print (no excalamation point)
                f. Copy/paste line breaks until text appears at the bottom of the Title Page (PDF Preview)
    b. When complete, prepare the Title Page to be printed
        i. Tools
        ii. PDF Preview
            1. Create PDF
                a. Service Code
                b. Grayscale
                c. Date (Print date)
    c. Ensure footer contains all required information
        i. Portfolio number
        ii. Date
        iii. Copyright
        iv. ISBN
        v. Page number
    d. Save Title Page in Portfolio Print Replacements folder

        i. Naming convention
            1. 574-3_TP_MM-DD-YYYY
    e. Save and Close Title Page in Oxygen

3. **Compose the Portfolio Description in Oxygen**
    a. Portfolio Description
        i. PDF Preview
            1. View to determine what changes, if any, must be made
        ii. Confirm disclaimer includes correct verbiage
            1. Change "This Tax Management Portfolio" to "This Bloomberg Tax Portfolio"
        iii. Confirm disclaimer is correct 9pt font
            1. Select p tag
            2. Add Attribute
            3. typesize
            4. 9
        iv. Ensure "This Bloomberg Tax Portfolio is not intended..." appears at the bottom of the Portfolio Description and does not contain an outdent
            1. Insert line breaks
                a. Paragraph
                b. Add Attribute
                c. Only in
                d. Print (no excalamation point)
                e. Copy/paste line breaks until text appears at the bottom of the Portfolio Description (PDF Preview)
            2. Correct outdent
                a. Attributes
                    i. Delete Primary Indent
        v. Author Profiles
            1. Center "Author Profiles" on page
                a. Insert special characters
                    i. Em spaces
                b. Copy/Paste em spaces until text appears centered (PDF Preview)
    b. When complete, prepare the Portfolio Description to be printed
        i. PDF Preview
            1. Create PDF
                a. Service Code
                b. Grayscale

c. Date
        c. Ensure footer contains all required information
                i. Portfolio number
                ii. Date
                iii. Copyright
                iv. ISBN
                v. Page number
        d. Save Portfolio Description in Portfolio Print Replacements folder

                i. Naming convention

                        1. 574-3_PD_MM-DD-YYYY
        e. Save and Close Portfolio Description in Oxygen
4. **Compose the Detailed Analysis chapters in Oxygen**
        a. Detailed Analysis chapter
                i. Make edits
                        1. Strip Copy History
                        2. Reassign All EINs
                        3. Confirm there are NO reserved footnotes
                                a. Find/Replace
                                b. Search for "reserved"
                        4. Renumber footnotes
                                a. Tools
                                b. Renumber Footnotes
                                c. Enter Starting Number
                                d. Checkmark Renumber table footnoes
                                e. Select OK
                                f. Footnote Viewer
                                g. Refresh
                                h. Make a note of the last footnote number
                ii. PDF Preview
                        1. Confirm the Detailed Analysis banner and tab appear on the first page of Chapter I ONLY
                        2. Cursory review of each page
                                a. Bulleted items
                                b. Footnotes
                                c. Examples
                                        i. Italic
                                        ii. Left indented
                                d. Quotes
                                        i. Left and right indented
                                e. Notes and Comments
                                        i. Italic
                        3. Tables
                                a. Highlight table
                                b. Review Attributes
                                c. Row and Column separators
                                d. Frame
                                        i. All
                                e. Tabstyle
                                        i. Remove x-large
                        4. Page numbers
                                a. Correct page numbers
                                        i. Detailed Analysis
                                        ii. Attributes
                                        iii. Folio
                                        iv. Insert correct page number
                                        v. Accept
                                b. Make a note of the last page number
        b. When complete, prepare the chapter to be printed
                i. PDF Preview
                        1. Create PDF
                                a. Service Code
                                b. Grayscale
                                c. Date
        c. Ensure footer contains all required information
                i. Portfolio number
                ii. Date
                iii. Copyright
                iv. ISBN
                v. Page number
        d. Save the chapter in Portfolio Print Replacements folder

                i. Naming convention

                        1. 574-3_DA_1_MM-DD-YYYY
        e. Save and Close Detailed Analysis chapter in Oxygen
        f. Repeat Steps 5.a through 5.d. for each chapter
5. **Compose the Table of Contents**
        a. Create the new Table of Contents

           i. Select each chapter in numerical order
           ii. Select the "more" icon
           iii. Select "Create TOC"
    b. Open WebQ
           i. Select "Edit" to open the new TOC in Oxygen
              1. 574-3rd-TOC-tmip-por
           ii. From the Tool Bar, select the "More" icon
           iii. Select "Edit as XML" to open XML code
           iv. Place the cursor AFTER the right arrow at the end of "<name>DETAILED ANALYSIS</name>"
           v. Hit enter several times to create space within the code
           vi. Use the ctrl + end command on the keyboard to take the cursor to the end of the code
           vii. Place the cursor AFTER the right arrow at the end of "<toc.entry1>"
           viii. Hit enter several times to create space within the code
           ix. Delete all code between the empty spaces
    c. Open the existing TOC
           i. Navigate to the Table of Contents to be edited
           ii. Change "Status" to Edit
           iii. Select "Edit" to open the file in Oxygen
              1. tmip-por 574-3rd 0 TC TABLE OF CONTENTS
           iv. From the Tool Bar, select the "More" icon
           v. Select "Edit as XML" to open XML code
           vi. Place the cursor AFTER the right arrow at the end of "<name>DETAILED ANALYSIS</name>"
           vii. Hit enter several times to create space within the code
           viii. Use the ctrl + end command on the keyboard to take the cursor to the end of the code
           ix. Place the cursor AFTER the right arrow at the end of "<toc.entry1>"
           x. Hit enter several times to create space within the code
           xi. Highlight and copy all code between the empty spaces
    d. Navigate to the existing TOC
           i. Place cursor in empty space
           ii. Use the ctrl + v command on the keyboard to paste the copied code
           iii. Select the "Save" icon to save the changes to the existing TOC
    e. Insert Page Numbers
    f. When complete, prepare the chapter to be printed
           i. PDF Preview
              1. Create PDF
                  a. Service Code
                  b. Grayscale
                  c. Date
    g. Ensure footer contains all required information
           i. Portfolio number
           ii. Date
           iii. Copyright
           iv. ISBN
           v. Page number
    h. Save the chapter in Portfolio Print Replacements folder

           i. Naming convention

              1. 574-3_TOC_MM-DD-YYYY
    i. Save and Close Table of Contents in Oxygen

6. **Compose the Table of Worksheets**
    a. Table of Worksheets
           i. PDF Preview
              1. View to determine what changes, if any, must be made
           ii. Confirm Worksheets are listed in numerical order
           iii. Confirm Worksheets are in Title Case
           iv. Confirm Worksheet titles end with a period
           v. Correct or remove unnecessary line breaks
           vi. Remove hyphenation from worksheet titles
              1. Insert line break
                  a. P tag
                  b. line break
           vii. Confirm "Working Papers for this Portfolio can be found online at https://bloombergtax.com" appears at the end of the Table of Worksheets and before "Additional Resources"
    b. When complete, prepare the chapter to be printed
           i. PDF Preview
              1. Create PDF
                  a. Service Code
                  b. Grayscale
                  c. Date
    c. Ensure footer contains all required information
           i. Portfolio number
           ii. Date
           iii. Copyright
           iv. ISBN
           v. Page number
    d. Save the chapter in Portfolio Print Replacements folder

           i. Naming convention

           1. 574-3_TOW_MM-DD-YYYY
      e. Save and Close Detailed Analysis chapter in Oxygen

7. **Combine Files in Acrobat**