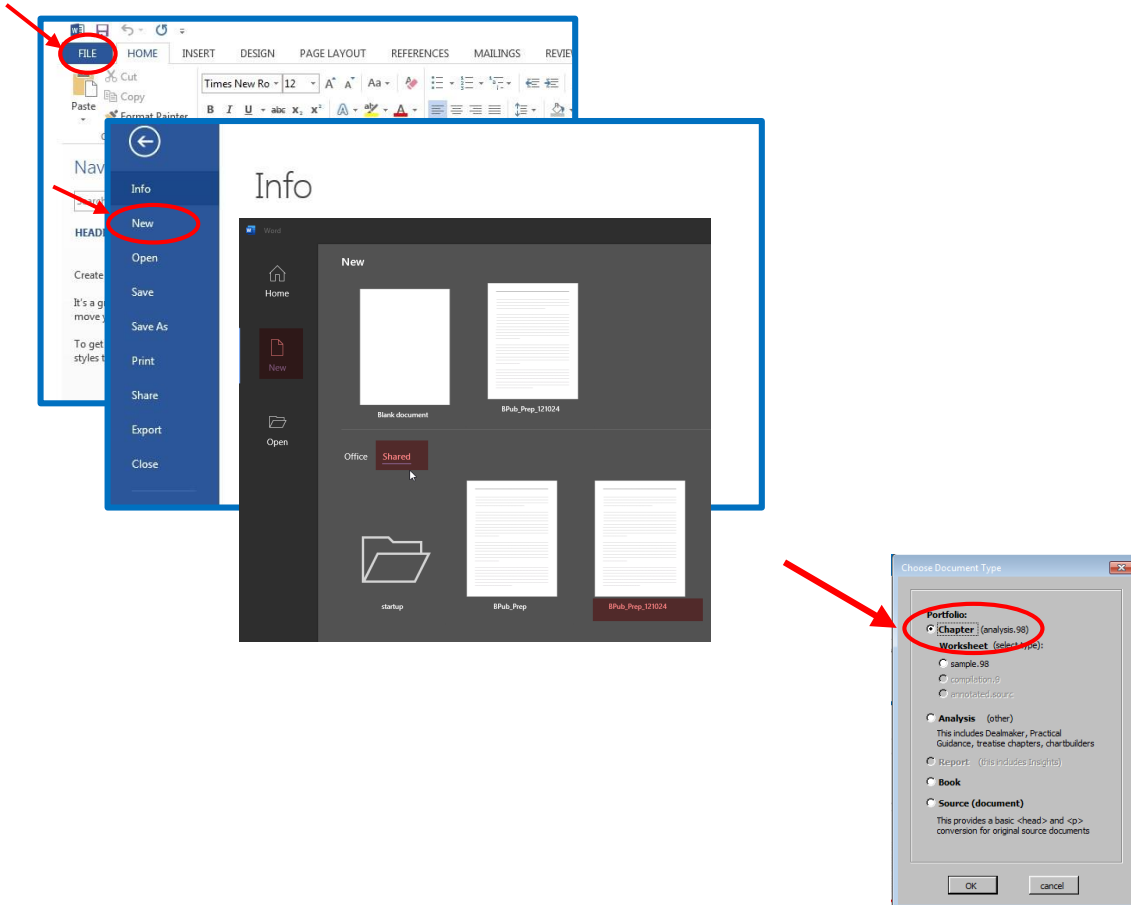
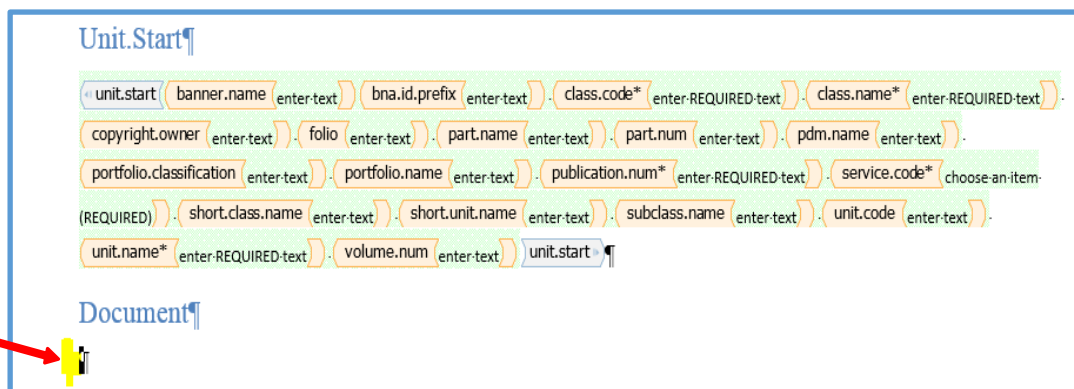


► 1. Create New file in Word.

A. In Word, click on **File**, then **New**, then **Personal**, then **BPub_#####**, then in *DocType* GUI, under *Portfolio*, select “**Chapter**” then **OK**.



B. You should now have an empty file, populated with an empty <porfolio.unit.start>.

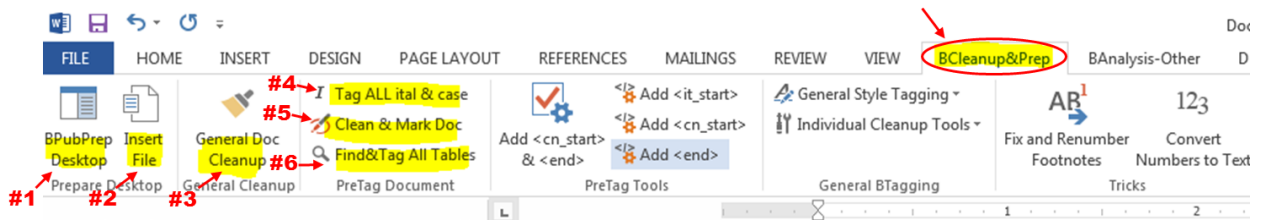


2. General File Cleanup and Preliminary Style Tagging

A. <portfolio.unit.start>. Enter values by tabbing from field to field. The service.code value is accessible via a picklist (you must be in Print Layout view to access the service.code picklist (access *Print Layout* under the *View* tab)).

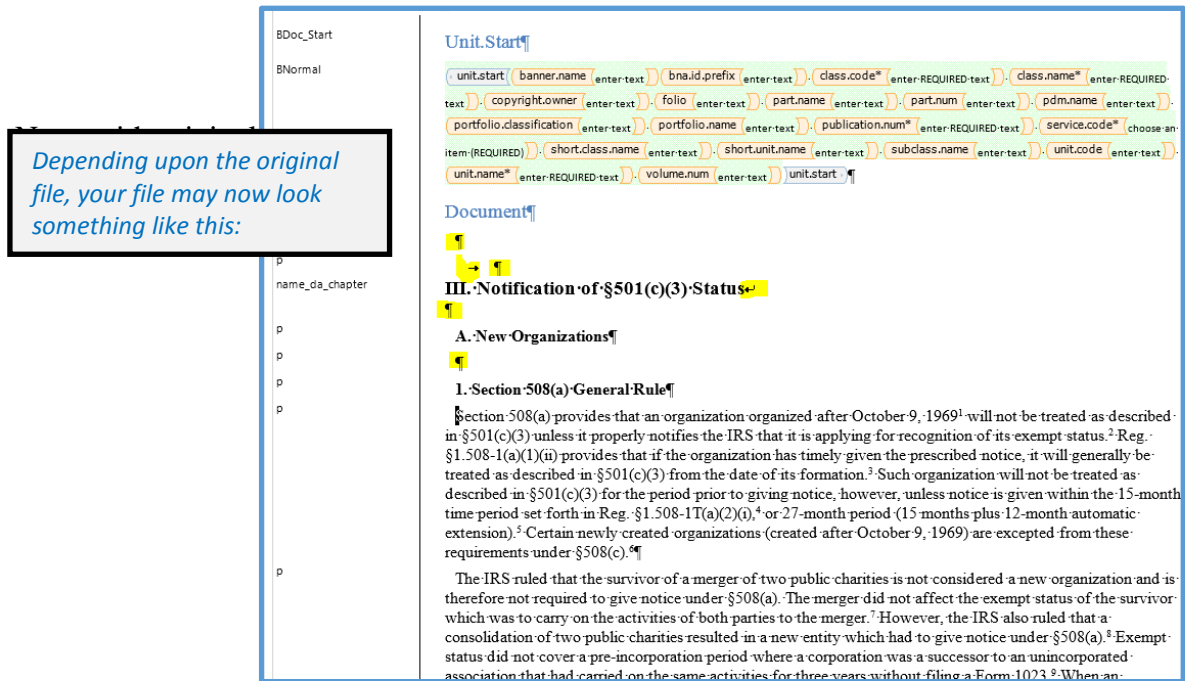
NOTE: The unit.start values must be added before sending the file through the gateway.

B. “Clean up” file. Click on the **BCleanup&Prep** tab.



Make sure cursor is located before the empty ¶. Then, select in the following order:

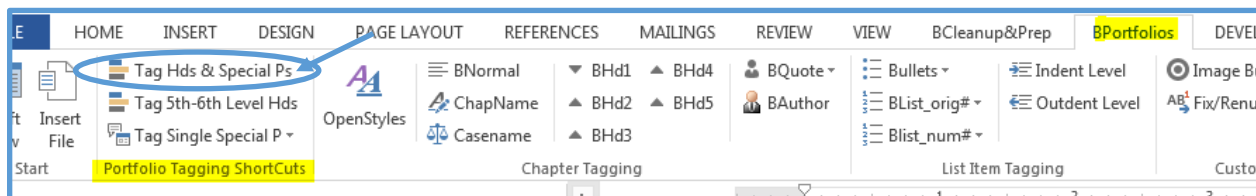
1. **BPub Prep Desktop** – opens Navigation/DocMap Pane, Style Pane, and Style Box.
2. **Insert file** – navigate to correct directory, then select [YOURFILENAME] and then, *Insert*.



3. **General Doc Cleanup** – this macro “cleans up” the document. Click **OK** when prompted.
4. **Tag ALL ital & case** – this macro finds italics, differentes italic vs casenames, applies Bstyle.
5. **Clean & Mark Doc** – applies Bstyles. Click **OK** when prompted.
6. **Find&Tag All Tables** – tags tables (does nothing if file has no tables). Click **OK** when prompted.

▶ 3. DocType-Specific Tagging.

A. Tagging. Click on *BPortfolios* tab. See buttons in the *Portfolio Tagging Shortcuts* group.



B. Apply General Portfolio Tagging. Select “Tag Hds & Special Ps.”

This macro cycles through your file. It looks for headings, bulleted/numbered lists, and “special” paras and applies the correct Bstyle tagging. (“Special Ps” are paragraphs which begin with “Comment:”, “Example:”, “Practice Note:”, etc.)

NOTE: Macros rely on pattern matching to discern where to apply various headings.

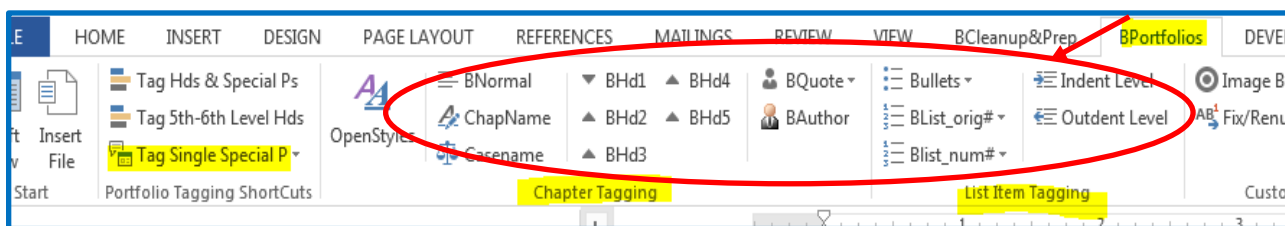
For example: a “BHead1” style would be applied to return followed by a capital letter followed by a period, followed by a space or tab (A. Heading Text Here).

Typically, if a macro is “not working,” it is because it is not finding the expected pattern. Please check this in your document if you have problems with the macros.

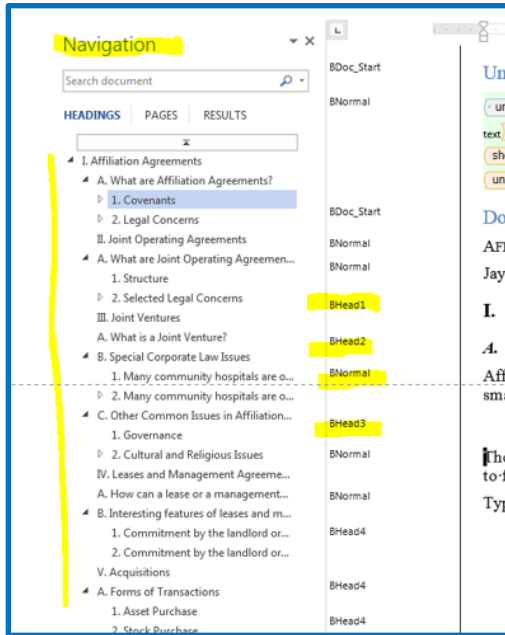
If your portfolio goes to a 5th or 6th level, use the “Tag 5th-6th Level Hds” button.

C. Review Document. Check for correct Bstyles, correct heading levels, <portfolio.unit.start> values, etc.

Use the individual tagging tools under the “Chapter Tagging,” and “List Item Tagging” groups to apply any style missed by the macro.

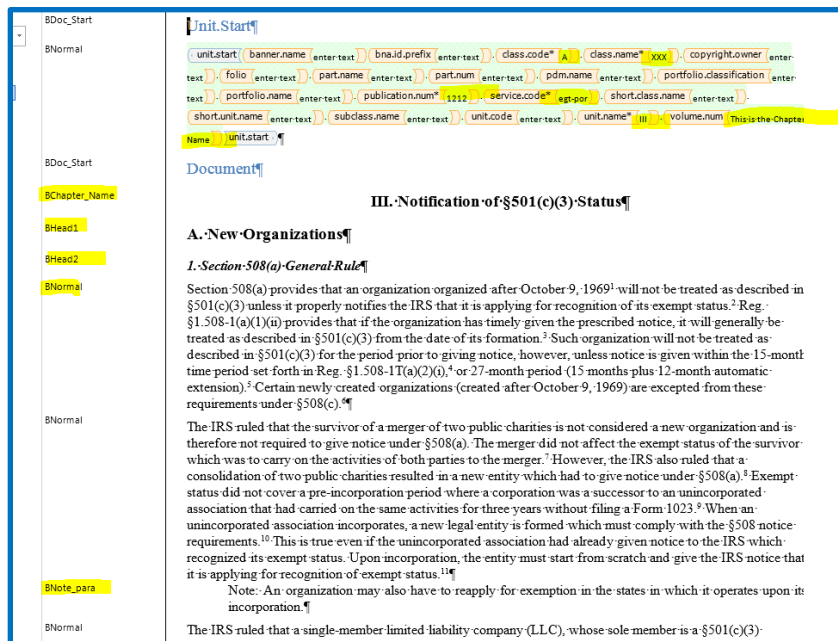


Use the Navigation Pane to ensure that document headings are correctly nested.



C. Document Ready to “Send to BPub” (or, in old terms, to “Send to the Gateway”)

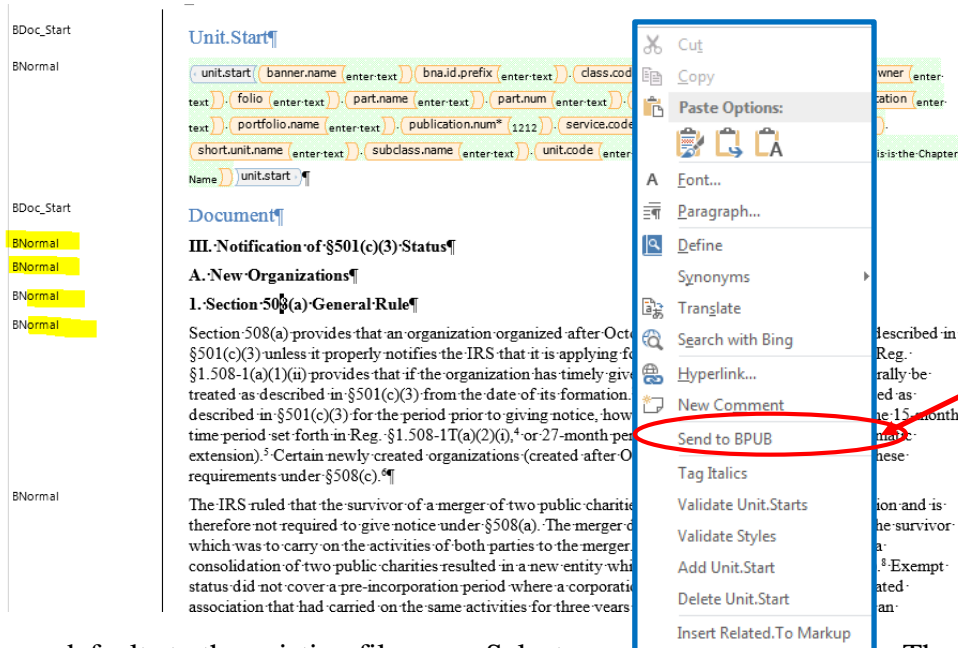
Below is an example of a file ready to Send to BPub. Note that it begins with a single “Bchapter_Name.” Each portfolio chapter *must* have something as BChapter_Name at the beginning of the file.



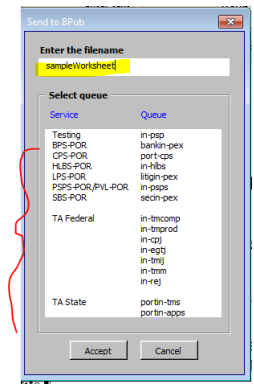
► 4. Send to BPub (i.e., “gateway”)

Once chapter file is complete:

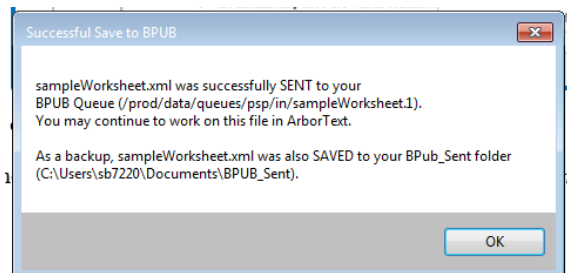
A. With cursor somewhere in text, **Right-Click**. Select **Send to BPub**.



B. The filename defaults to the existing filename. Select appropriate *queue group*. Then **Accept**.



C. If this message displays, file has successfully been sent to specified queue.



▶ 5. Chapter Delivered to BPub (i.e., queue)

A. Check queue for file:

filename	headline/name	slug x	date x	owner x
sampleWorksheet	1 Initial COBRA Notice Content Requirements		4/29 13:55	in
160430IB_VN_Dividends_GT_v2	Vietnamese Tax on Dividends Paid to Overseas In...	Dividends	4/29 12:28	in
160430IB_MY_FATCA_Wong_v2	Implementation Status of FATCA in Malaysia	Tax Compliance	4/29 12:28	in

B. Open in AT. Edit, as needed.