

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:

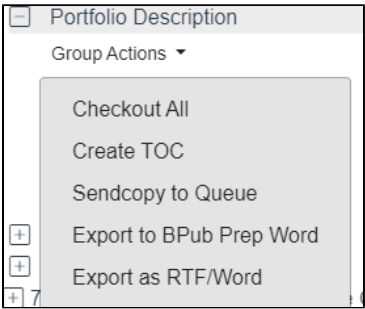
- [Work is assigned](#)
- [Checkout the files from BWIP](#)
- [Compose the Title Page in Oxygen](#)
- [Compose the Portfolio Description in Oxygen](#)
- [Compose the Detailed Analysis chapters in Oxygen](#)
- [Compose the Table of Contents](#)
- [Compose the Table of Worksheets](#)
- [Combine Files in Acrobat](#)

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 exclamation 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 exclamation 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 footnotes
 - 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

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**