

## ***Technical Publications Production Notes***

Release 2.5

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*Contract Technical Writer, 10/2000 — 05/2001*

**VALUBOND**★

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# Chapter 1 Introduction

## Purpose

This publication explains the history and conventions of publications for the ValuBond platform.

## Intended Audience

This publication is written for follow-on writers or editors of the ValuBond family of technical publications.

## General Comments

» **Note:** For answers not provided in these pages, email [valubondquery@johnsonstudios.com](mailto:valubondquery@johnsonstudios.com). I will answer as quickly as possible.

A first-person narrative describing a technical publications program may be unusual. I decided to write one because in past assignments I've inherited tasks with no historical reference. The turnover in the technology industry adds confusion and a lack of history to development efforts. My goal in this document is to describe the ValuBond platform and its supporting documentation.

I was ValuBond's technical writer from 10/2000 until the contract's end in 5/2001.

The ValuBond platform is in solid shape for further documentation. This is the first time in my life as a technical writer that a project of this scope has actually been completed, let alone activated for commercial trading. There have been incremental changes, but they all make sense, are client-driven, and the programming team has kept good internal notes.

ValuBond, Incorporated, was founded to bring online trading to the bond market. In the Summer of 2000, ValuBond hired a contract team of technical specialists to build the hardware and software mechanism. I was hired for a "two week contract" to produce a small set of training materials. These materials were to be for three audiences:

- Administrators who perform account maintenance and post new bond issues for sale on the platform
- “Relationship managers” who oversee strategic business partnerships. The partners are called “subscribers” in company parlance; for more on this see [“User And Subscriber Terms”](#) on page 6-2.
- General site users

In the original two weeks, I produced the training documents and conducted the first training classes.

A *Security Policy* (required by partnership agreements) was added to the schedule. Since the ValuBond platform was evolving quickly, I wrote a quick policy based on Requests for Comment found on the Internet, security materials at the National Institute of Standards and Technology, and my own background as a former intelligence officer. The final *Security Policy* was updated and released in March 2001.

By mid-October 2000, the technical and project managers realized that they needed more publications than those produced in a two-week period. The following titles were ultimately added to my scope, and were revised with each modification of the platform:

*Demonstration Guide*

*Runbook* (a system administration manual)

*Quickstart Guide* (for subscribers)

## ***Platform Changes and Updates***

The development team uses a bug tracking system called Web Tracker. See the project manager for access.

## ***Style References***

- *The Chicago Manual of Style*, Fourteenth Edition, 1993.
- *The Microsoft Manual of Style for Technical Publications*, Second Edition, 1998.
- Microsoft Word and Adobe FrameMaker templates from past assignments.

## **Organization**

This publication is organized as follows.

This introduction explains the basics of the book.

[Chapter 2, “Site Information and Key Business Processes”](#) contains information on the ValuBond platform’s logical components.

[Chapter 3, “File Locations”](#) explains where source and production files are.

[Chapter 4, “Chronology of Publications”](#) is a history of ValuBond technical publications from October 2000 – May 2001.

[Chapter 5, “Software”](#) is a brief description of ValuBond’s publishing tools.

[Chapter 6, “Style”](#) discusses lexical and design style for ValuBond’s technical publications.

[Chapter 7, “Typefaces and Fonts”](#) discusses ValuBond’s typography and the use of required PostScript and TrueType fonts.



# *Chapter 4      Chronology of Publications*

## **Overview**

This chapter is a time line of the ValuBond technical publications program from October 2000 – May 2001.

## ***Word Templates***

These were imported from previous work in converting Frame documents to Word. They served as the style source for *New Issues Training*, *Site Training*, and the *Demonstration Guide* from October – December 2000.

## ***Frame Templates***

Like the Word templates, these were from a previous job. They were the basis for the *Runbook* and *Security Policy* from January – May 2001.

## ***New Issues Training***

This was the first document written, October 2000. It was for the trading desk administrators in Nashville. It was done in MS Word.

## ***Site Training***

This was the second document written, again for trading desk employees in Nashville, in November 2000. It was intended for a “train-the-trainer” program for partnering companies such as Schwab, but this was never implemented. The directories have a hierarchy of three levels that mirror the original, though unrealized, tiers of training materials.

## ***Demonstration Guide***

This was done in December 2000, based on business notes and PowerPoint presentations. It was published to provide a standardized script, and also to be a surrogate site demonstration directly from a laptop should network connectivity fail during a marketing presentation.

## ***Security Policy***

The first version was done in October 2000 to meet a business requirement. The second version was completed in more detail in March 2001.

## ***Runbook***

The *Runbook* was done in several iterations from January – April 2001. It is a work-in-progress, so the PDF still bears the Draft watermark.

## ***Quickstart Guides***

*Quickstart Guides* are for business partners such as Schwab and J.P. Morgan. The guides introduce traders to the functions of the ValuBond platform. The emphasis is on secondary market trades. The typography and layout are a departure from the templates; topic headings are on vertical baselines in the left margin, and body and title type is in a faux (TrueType) Gill Sans called Guilford.

## ***ValuBond Publication Notes***

This is the volume you are reading now; it was written in May 2001.

## ***Data Dictionary***

As referenced in [“Data Dictionary” on page 3-1](#), the Data Dictionary is not a publication per se. The database field definitions and table characteristics are in a dynamic format that displays in HTML. See the Database Administrator (DBA) for details and access.



# *Chapter 6*      *Style*

## *Overview*

In October 2000, ValuBond chose Microsoft Word for publishing. This presented several difficulties. First, there were no existing templates. Second, Word is difficult to use and merge into complex volumes; the “master document” feature simply doesn’t work, and things like tables of contents and indexes across multiple chapters are work-arounds.

I used existing templates from a previous assignment, given the time crunch, and tried to make them as robust as possible.

In January 2001, ValuBond purchased FrameMaker 6.0. I adapted functioning templates from an earlier assignment.

## ***Manuals of Style***

Conflicts arise from the use of two manuals of style, in this case, *Chicago* and *Microsoft*. The most direct contradiction is in the use of a solidus or slash to designate alternatives such as yes/no. Microsoft is set against this construction, while Chicago allows it. At ValuBond, it made sense to incorporate the slash in the flow of product descriptions.

There are other deviations that made visual sense but which violated Microsoft's style guidelines. For example, Microsoft feels that command or literal input text should simply be capitalized; the ValuBond publications place the text in `monospace bold` for clarity. For the documents published in FrameMaker, apply the paragraph catalog tag "command." Also, em and en dashes do not touch adjacent text, contrary to *Chicago*.

## ***Lexicon and Business Terminology***

### ***User And Subscriber Terms***

Users. This term has evolved to several different categories. Different categories equate to different access privileges on the ValuBond platform.

- *Individual users* are individual investors.
- *Registered users* can use the Bond Research tools, but can not trade.

Subscribers. Companies that partner with one another are logically called partners, or sometimes strategic partners. ValuBond's original contractual documents describe these entities as subscribers for reasons that are not entirely clear. Thus the term is used to describe partnership arrangements. There are three categories of subscribers.

- *Brokers* can see the Live Bond Offerings but can neither buy nor sell.
- *Traders* can see the Live Bond Offerings, and can buy and sell.
- *Administrators* can post New Issue orders, as if from the ValuBond trade desk.

## **Disclaimers**

Financial trading companies have their own set of governors and industry regulators. Thus, ValuBond has legal restrictions on operations and some cautions on what is published.

### **Front Matter**

The front matter disclaimer is for the protection of copyright, trade secrets, and the limitation of liability.

» **Note:** *The Frame version contains variables such as addresses and company names. Click on the text in the Frame source files to highlight a variable.*

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In addition, the page footers of internal documents are marked (as are those in this volume) with a general caution statement. This statement is a Frame variable and will automatically update below if changed.

This page contains ValuBond proprietary information and is not to be duplicated or disclosed to unauthorized persons.

### **External**

External documents have a specified text that is always appended, usually in the footer.

All transactions are conducted through ValuBond Securities, Inc. member NASD/SIPC, a wholly-owned subsidiary of ValuBond. System response and access times may vary due to market conditions, system performance, or other factors.

## Templates

There was neither time nor a requirement to construct custom templates. I relied on Word and FrameMaker templates from a previous job. The templates had similar look-and-feel.

FrameMaker is inherently more stable than Microsoft Word. FrameMaker is a professional publishing tool; Word is not.

Each publishing job has unique requirements. The final templates have minor modifications that reflect ValuBond's needs. The resulting chapters (in the case of Word documents) and books (for FrameMaker) have templates that are reasonably resilient. The Word chapters have minor variations; resaving and reapplying styles often changes the file in unpredictable ways that are the bane of every technical publisher.

### FrameMaker Templates

FrameMaker allows character, paragraph, table, and a host of other styles and applies and updates them efficiently.

The FrameMaker volumes have

- A title file with the title page and main internal disclaimer
- A table of contents
- Chapter files
- Appendix files
- An index

» **Note:** *The Runbook has a full set of files for copying and renaming into a new book.*

#### ▼ **To make a new book from existing Frame files**

1. Copy book, title, chapter, and appendix files into a new directory.
2. Rename the book file to the new volume name.
3. Open files and rename variables.
4. Flow new text, headings, and so on into new files.
5. Copy files (such as chapters) as needed, and import variables.
6. Generate TOC and index.
7. Delete new TOC and index, and rename TOC and index from previous volume to mirror newly-generated names.
8. Regenerate and save the book.

The Chapter and Appendix files have master pages for both portrait and landscape orientation. The title pages have no header and have an H1 heading and automatic chapter numbering. Title pages also have a narrower text column. This is to place summary or introductory information at the front of the chapter and enhance readability by presenting fewer characters per column inch. Follow-on pages have a wider text column to put more information on the pages.

## **Word Templates**

The Word documents are not linked to a root template. Creating new documents and linking them to a template directory is not a guarantee of stable files. Instead, the files are copied into new directories and existing text is replaced with new text. This seems to preserve typographic styles, though there are still the usual problems with Format > Bullets and Numbering.

As mentioned, using Word to make a composite document isn't always easy. The master document feature is supposed to allow dynamic embedding, but never works. When composing a PDF, naturally, you must save each file as a separate PDF and concatenate them in Acrobat to make a composite document. This involves adding extra blank pages, if necessary, to force an even page count for each chapter. I will describe this process below.

A Word "book" contains the following files:

### **Frontmatter.doc**

The Word front matter combines several of the files that are separate in the Frame versions of these books. It has a title page, a copyright and disclaimer page, and a table of contents (TOC). The TOC is inserted from the Insert > Index and Tables menu. At the end of the TOC are "RD" ("read") statements that correspond to the names and paths of the chapters in the book. When the TOC is built or updated, Word reads the statements and extracts the headings down to the appropriate level and appends them and their respective page numbers to the TOC.

» **Note:** *For a new TOC, open an older TOC file and Save As a new file in a new directory. Attaching a template is possible, but this could be courting disaster with changed styles and unanticipated excitement through MS Word.*

#### **▼ To set up a Word TOC with RD statements**

1. Insert a Table of Contents in the desired place (or use a previous set of TOC fields by copying a frontmatter.doc file into a new directory).
2. Insert > Field > (scroll in dialog box to "RD" and enter filename or path).

`{RD Introduction.doc}`

```
{RD First Chapter.doc}
```

And so on.

3. For simplicity's sake, it's best to keep all files in the same directory, so that the paths in the RD statements can be absolute. If files are to be read in other directories, specify the path in the RD statement like this:

```
{RD C:\directoryname\filename.doc}
```

▼ **To rebuild the Word TOC (and the index)**

1. Quit Word.

» **Note:** *If rebuilding the TOC (or index) produces “ERROR! Cannot open file referenced on page nn,” quit Word and reopen only the file to be updated. Word has a nasty habit of failing to regenerate lists if the file is not opened first. It's smart to quit Word again and then open the next files to continue work.*

2. Reopen frontmatter.doc.
3. Position the cursor in any of the gray TOC fields.
4. Press F9 to update.

**<Chaptername>.doc**

As with the front matter (frontmatter.doc), it's probably best to copy a chapter with correct styles and numbering into a new directory and rename it, rather than risk attaching a separate template and corrupting the file.

**Index.doc**

The index (index.doc) should probably be copied from a reliable Word index file to a new directory for a new project.

▼ **To make an index**

1. Cut-and-paste the list of RD Statement fields from the manual's fontmatter.doc table of contents to the bottom of the index (below the Word index fields).
2. To update the index, place the cursor in one of the gray Word index fields and press F9. Word should read the RD statements, open the called files, compile the index fields, and populate the index.
3. If this doesn't work
  - a. Close the index file after saving.
  - b. Quit MS Word.
  - c. Open the index file.

- d. Doing nothing else, place the cursor in a gray Word index field.
- e. Press F9.

This should rebuild the index.

» **Note:** When failure occurs, always quit MS Word, reopen only the file you wish to update, and follow the update procedure.

## ***Production Topics***

### ***Frame to PDF (Portable Document Format)***

Select Acrobat Distiller as the default printer and use Frame's Print Book feature to produce a PostScript file. Distil the PostScript file and save as a PDF.

### ***Word-to-PDF***

#### **▼ *To make a composite PDF from Word***

1. Build all TOCs and indexes.
2. Distill the separate files as PDFs.
3. Open Acrobat.
4. Starting with the frontmatter.pdf, import successive chapter PDFs, adding blank pages as necessary to force even page counts for each chapter and for the volume.

## ***Corporate Identity and Technical Publications Design***

ValuBond's logo development and identity book were done by a marketing and public relations firm. I have added a directory of marketing graphics to the legacy directories. The logos use mostly Copperplate and some sans serif typefaces and can be recreated on the fly if necessary. ValuBond to date hasn't put the strictures on logo use that, say, General Electric has. Part of this is an open acceptance of a growing marketing program, and part is due to a change in business image. For example, several of the logo typographic treatments show a Uniform Resource Locator for the Internet ([www.valubond.com](http://www.valubond.com)); in 2001 this "dot com" association became less desirable.

There is sparse use of identity graphics in the technical publications to date. A version of the ValuBond logo is normally in the lower-right corner of the cover page. The *Quickstart Guide* repeats this treatment on each of its two pages.

Thus, there is much design freedom in making ValuBond's technical and training documentation. The current volumes are based on several concepts:

- Readable body text in serif typefaces, headings in sans-serif. Exceptions to this are the body text in the Quickstart guides (presents a slicker visual appeal), and the presenter's notes in the Presentation Guide.
  - The Word template uses 11-point New Century Schoolbook with no real typographic control on leading.
  - The FrameMaker template uses 11-point New Century Schoolbook on 13-point leading.
- Generous use of white space
- Non-numbered headings
- Simple use of navigation information; titles, document types, release numbers, and effective dates in headers and footers
- Minimal use of graphics, mostly confined to horizontal rules and screen captures
- Use of sans serif type on vertical baselines in the margins as heads in the *Quickstart Guides*

# *Chapter 7      Typefaces and Fonts*

## **Overview**

Chapter 6, “Style” describes design decisions for ValuBond’s publications; font usage is simple and fonts are few in number. The main typefaces and fonts used in the ValuBond technical publications are:

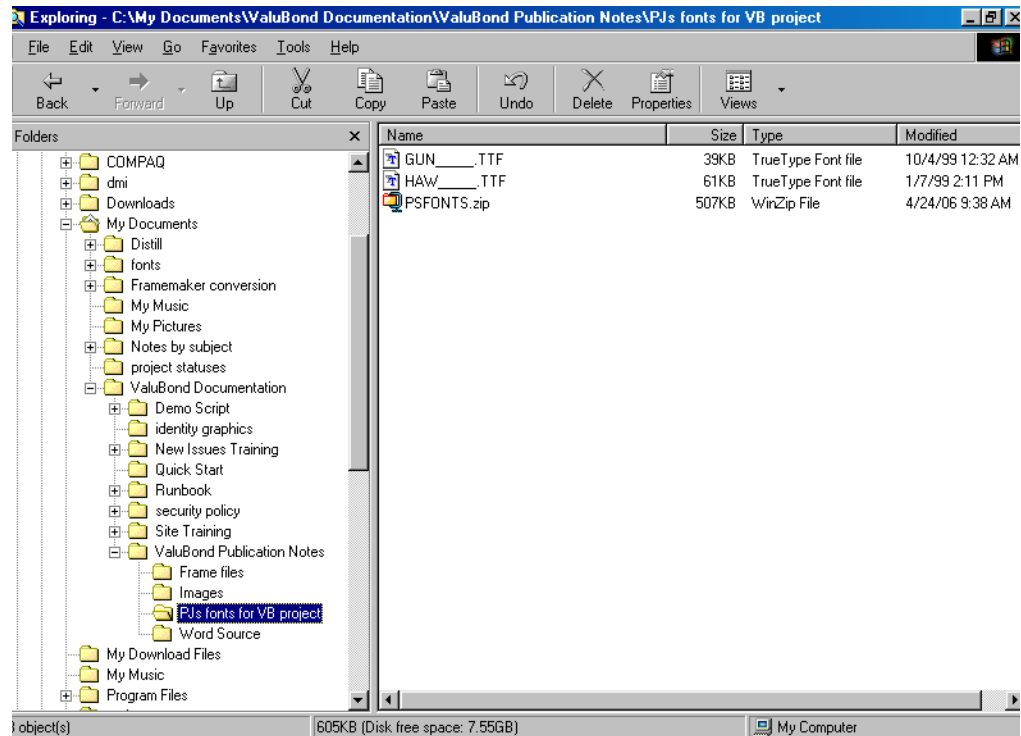
Headings: Adobe PostScript Helvetica.

Body Text: Adobe PostScript New Century Schoolbook

Specialty Sans Serif: Guilford True Type

## Project Fonts

The project fonts are in the directory shown.



## Adobe Type Manager (ATM)

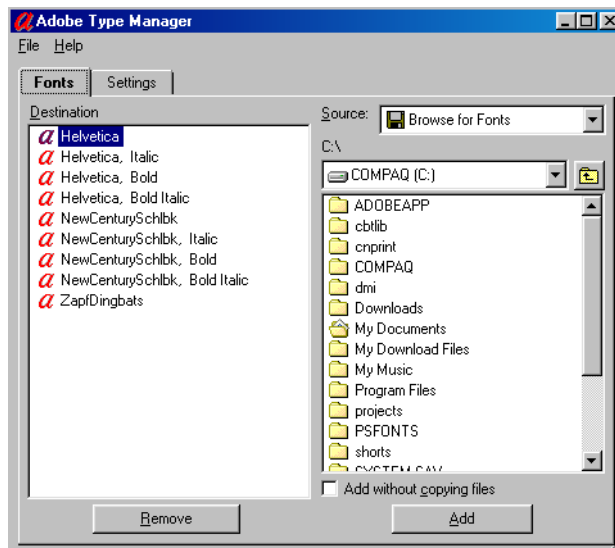
The PostScript fonts must be activated for use in Word and FrameMaker with Adobe Type Manager (ATM). ATM is available free for download from [www.adobe.com/products/atm](http://www.adobe.com/products/atm).

### ▼ To install the ValuBond documentation font set

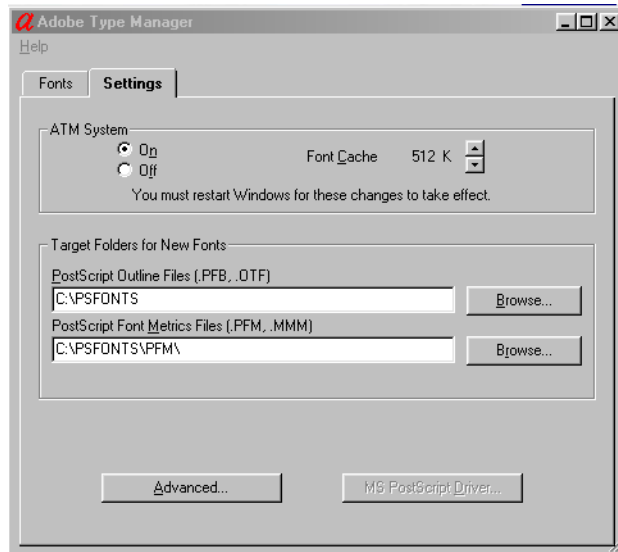
1. Unzip the file PSFONTS.zip in the root directory of your local drive. This creates a PSFONT directory of font files ending with the extension .pfb, and a directory called PFM containing font files with the extension .pfm.

» **Note:** PostScript fonts have two parts, a screen font for display on the monitor and a print font that contains the mathematical characteristics of each letter in a character set. When a PostScript font in a document is printed, the print font measurements are sent to the printer or other output device. This ensures accurate typesetting. Adobe Type Manager (ATM) is a font management tool for PostScript fonts. ATM “smooths” the rasterized fonts on the monitor and makes the printer fonts available.

2. Download and install Adobe Type Manager (ATM). When you have done that, or if it is already installed, open ATM.
3. Select the Fonts tab.
4. In the drop-down list box Source, select Browse for Fonts.
5. In the drop-down list box below Source, click the drop-down tab and navigate to, and double-click on, the PS FONTS folder on your C: drive.
6. Select the available fonts (font names displaying the “a” icon) and click Add.
7. Double-click and open the PFM folder.
8. Select the font names displayed and click Add.



9. Select the Settings tab. The settings and information should be similar to those in the screen below.



## Production with Acrobat

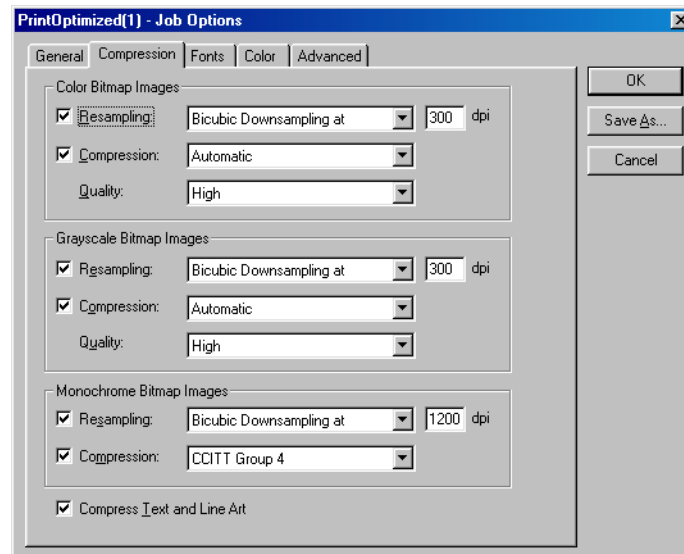
Adobe Acrobat, because it relies on PostScript, functions well with ATM and PostScript fonts. It also embeds True Type fonts in the document and approximates the font metrics to make standard output.

Acrobat files can be printed locally, displayed on screens across a network or remotely by web browser, or sent for commercial reproduction. As of this writing, ValuBond has an account with Kinko's for printing. Use File Transfer Protocol (FTP) to send the PDF file for reproduction.

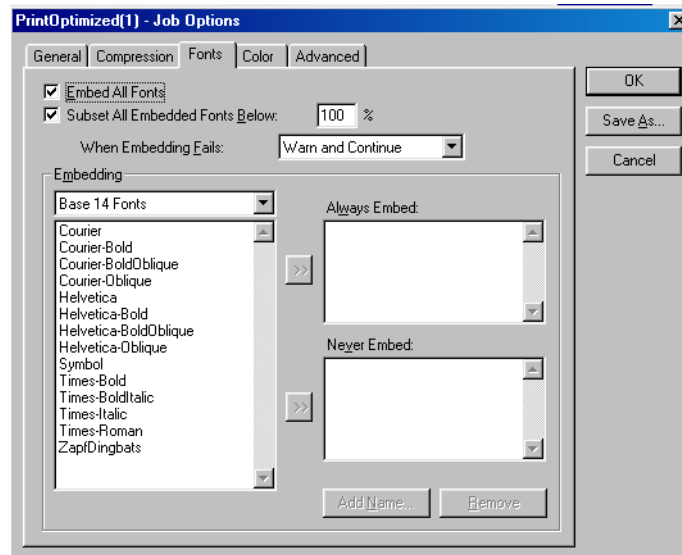
» **Note:** When using a print vendor, select a heavy grade of paper, normally 60-pound, for best results. If selecting paper for three-hole binders, request 3/8-inch drill. It costs more but the results are superior to the 1/4-inch punched bond paper. The 1/4-inch tears and frays more, often making a poor impression.

### ▼ To configure Distiller for ValuBond publishing

1. Open Distiller > Settings > Job Options
2. Click the Compression tab and set the parameters as shown below.



3. Click the Fonts tab and set the parameters as shown below.



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