

CFA INSTITUTE AND THE NLM BOOK DTD, YEAR 2

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CFA INSTITUTE

- Is the largest global association of investment professionals, with over 110,000 members in 139 countries
- Offers career & educational resources, including:
 - the Chartered Financial Analyst® designation (CFA Program),
 - the Certificate in Investment Performance Measurement (CIPM), and
 - Claritas Investment Certificate
- In FY2012, had over 200,000 candidates register for one of the CFA Program exams in over 180 countries worldwide

- Serial publications and newsletters

**JUST WHEN WE THOUGHT IT WAS SAFE
TO GO BACK IN THE WATER**

- ...monographs, literature reviews, research and position papers



WHY THE NLM BOOK DTD?

- DITA, Docbook vs. NLM
- No reason not to
- Our familiarity with NLM tagset
- Interchangeability between journal and book XML allows for easy mixing

BOOK XML TO...

- Print
- Online
- Ebook
- Upcoming
 - Refresher Readings
 - Study tools

CHALLENGES OF NLM BOOK TAGGING

- We look forward to
 - @specific-use attribute for <list-item>
 - Table of contents tagging
- We are interested in
 - Systems of creating index markup within sets of files
- @specific-use: we use to mark optional vs. required content, as well as certain formatting restrictions

CHALLENGES OF XML FOR BOOKS

- XML allows for automated, single-source publishing – greater distribution opportunities available more quickly
- However, truly automated production requires accepting some layout compromises
- Print:
 - All authors are special
 - Table formatting
- Online and ebooks:
 - Stylesheets can only render content so predictably
 - Too many (proprietary) ebook standards with too little documentation easily available
 - It's a challenging place to reside now, but it's still where our members expect us to be

BENEFITS

- Single-source publishing: safer. No branched products; updates get made everywhere.
- “Just push the button”: easier for production, but also content owners
 - Changes don’t have to be tracked manually, one-by-one
 - Less time needed in production means more time authors and editors can have with content

LESSONS LEARNED

- Control your content
- Automation \neq immediate

THANK YOU

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