



Downloadable File Guidelines For Visa Online

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1 Overview

1.1 *What is Included*

This document provides guidelines and requirements for downloadable files (Adobe PDF, Microsoft Word, Excel, and PowerPoint) published on Visa Online (VOL).

1.2 *What is Not Included*

This document does NOT include the following:

- Details on creating, modifying, or optimizing downloadable files that are covered in Help documentation provided with your software (for example, specific instructions on using Acrobat Distiller)
- Details on creating other types of files (PowerPoint, Excel, ZIP, etc.).
- Detailed process and requirements for publishing information on Visa Online. Refer to the VOL [Content Development Guide](#), or contact the VOL team.

1.3 *Contact the Visa Online Team*

If you have any questions on these guidelines, ask your VOL Content Manager or email usvol_content@visa.com.

2 Requirements

2.1 *Valid File Types on VOL*

2.1.1 Adobe PDF

Provide Adobe Portable Document Format (PDF) files when you want to provide materials that look exactly like original documents and preserve the source file text, drawings, and full-color graphics. PDF is preferred on VOL because it is difficult for a user to modify the files for use out of context.

Typical PDF files on VOL include:

- Electronic versions of printed materials (newsletters, brochures)
- Guides (implementation, planning, marketing, etc.)
- Actionable items (order forms)
- Excerpts of images from large documents

2.1.2 Other File Types

Provide other file types when you want the user to be able to use or modify the original file. For example, you can provide an Excel spreadsheet in a ZIP file so that users can make calculations with the original formulas.

Valid file types for VOL are Adobe Acrobat (PDF), Microsoft Word (DOC), Microsoft PowerPoint (PPT), and Microsoft Excel (XLS). Contact the VOL team if you want to provide other types of downloadable files.

2.1.3 ZIP Format

The following procedures may reduce file size:

Provide files in a ZIP format (file extension .zip) in the following cases:

- Multiple files that go together
- A large file that exceeds the recommended download size (refer to Section 2.2)
- Files other than PDF or Word (Excel, PowerPoint, etc): member feedback indicates that files can become corrupted or not operate correctly when opened directly in a new browser window

As the default, provide files in PDF format if the user does not need to use or modify information in the original file.

2.2 *File Size*

2.2.1 Maximum Download Size

- The maximum download file size should not exceed 5 MB.

2.2.2 Tips to Reduce File Size

The following procedures may reduce file size:

- Compress the file into a ZIP format. Refer to Section 2.1.3.
- Break down larger files into separate small files as appropriate.
- Provide multiple files in a ZIP format, which may reduce the total file size. Refer to Section 2.1.3.
- PDF: Check the “Allow fast web view” box in Acrobat. Select Edit → Preferences → General → Options.
- PDF: Use PDF Optimizer settings available in Acrobat 6.0 and later.
- PDF: Use the Save As option.
- PDF: Un-embed fonts if this is an option. Note: Fonts often account for a large percentage of a PDF document's file size. You can safely un-embed fonts if you know that they are already installed on the computers of the users who will read your PDF document. If you un-embed a font that isn't available to someone reading your PDF document, Acrobat will pick a substitute font when the document is opened on their computer.

2.3 File Naming

Use the following guidelines for naming downloadable files:

- Give each download a succinct and descriptive title.
- Avoid upper case letters.
- Do not use special characters or spaces (only underscore_ and hyphen- are allowed).
- File names should include only one period before the file extension. Do not include additional periods.
- File names must not exceed 31 characters, including period and extension (for example: longest_possible_file_name1.doc).
- Do not include version numbers or dates in the file name. This makes easier to replace updated versions of a file without updating the underlying HTML code.
- Note: The VOL team may change your file names if they do not meet the requirements.
- Refer to the VOL [Content Development Guide Technical Requirements](#) for additional detail on file naming.

2.3.1 Example: File Naming

- Good examples: smallbuspromo.pdf; mktbestpractices.pdf
- Bad examples: Promo_Finalv01.pdf; Marketing Best Practices 031505.PDF; smallbus.04.08.06.pdf

2.4 Date

Use the following guidelines for adding dates to downloadable files:

- Include a visible date in the header, footer, or cover page of every downloadable file. You may also include this date information in the metadata Title. Refer to Section 2.5.1.
- Note: Going forward, it is no longer a requirement to include the file size and date in the description for downloadable files (PDF, DOC, etc.). This makes easier to replace updated versions of a file without updating the accompanying HTML text.
- Note: Removing the file size and date should be done for an entire section. Please consult with your VOL Content Manager.

2.4.1 Example: Date and File Size

- Old method of showing size and date for downloadable files:
[Member Comments Form](#) (PDF - 26K - 07/01/2006)
- New method:
[Member Comments Form](#) (PDF)

2.5 Metadata

Metadata is important because it allows the VOL search engine to compile and return search results that are appropriate to the content.

- The VOL Content Manager will work with the Content Owner to determine metadata that will ensure downloadable files appear appropriately in search results.
- Each downloadable file must have appropriate metadata. This includes PDF, DOC, XLS, PPT, and MPP formats.
- Title and Keyword metadata is required for downloadable files. Other metadata (such as Author and Description) is optional.
- Refer to the VOL [Content Development Guide Technical Requirements](#) for additional detail and examples regarding metadata.

2.5.1 Title

The metadata Title identifies a downloadable file in VOL search results.

- Title metadata is added under the Document Properties of the file. Refer to Section 2.5.3.
- Title metadata appears as the title in the Description area of the search results as shown below.
- Title is a text string that should match the actual title or heading within the body of the document. It should be unique and descriptive for each of your documents.
- If the date and version is key to identifying the document, include that information in the Title. This helps distinguish the document from similar documents in the search results.

Note: For downloadable files, the description is currently automatically generated by the search engine based on content in the file; it is not controlled by Description metadata in the downloadable file.

2.5.1.1 Example: Metadata Title with Date

Title: VisaNet Processor Digest, August 1, 2006

Title: VisaNet Processor Digest, June 9, 2006

Title: Business Enhancements News, Volume 5, Issue 16, April 26, 2006

Title: Business Enhancements News, Volume 5, Issue 24, June 26, 2006



2.5.1.2 Example: Search Results Showing Metadata Title

[Home](#) | [Edit Profile](#) | [Change User Name](#) | [Change Password](#) | [Help](#)

[Visa Online](#)

Visa News

Product and Services

Marketing

Systems and Operations

Risk Management

Resources

Services & Applications

Service & Application Info

Usage Reporting Service

VOL State

Visa Operating Regulations

Bill Licensing

Merchant Data Manual

Interlink Operating Regulations

Communications Resource

Visa Pricing Directory

VOL State Plus

Shopping Cart

Order Status

E-Mail

Administrator Tools

Search Again

best practices

[FAQ](#) | [Advanced Search](#)

Search Results
 You are searching for: best practices
 Documents found: 603 ◀ Page 3 of 61 ▶ Go to page:

Description	Date	Content Area	File Type
Merchant Offer Program - Best Practices Merchant Offer Program Fall 2005 General Offer Appeal and Redemption Top-redeeming offer types: 10 - Dollars off - Percent off - Value-added Categories yielding the highest average ticket: 10 - Travel, including cruise, air, and car - Specialty stores... File Size - 177K	06/25/2006	Marketing	PDF
Visa Extras Marketing Best Practices 2 x 5 - Visa Extras Marketing Best Practices Insights From Market Research and In-Market Results Using Visa Extras Marketing Best Practices Visa Extras Overview Launching Visa Extras to Your Employees Enrolling Cardholders in Visa Extras Encouraging... File Size - 423K	04/26/2006	Marketing	PDF
Visa Business Check Card Risk Management and Operations Best Practices Visa Business Check Card Risk Management and Operations Best Practices Visa Business Check Card Risk Management and Operations Best Practices I 2005 Visa U. S. A. Inc. Notice: This information is CONFIDENTIAL and may only be used for the operation. File Size - 1936K	12/07/2005	Risk Management	PDF
Visa Procure-To-Pay Best Practices © INTRODUCTION The Visa Procure-To-Pay Best Practices study indicates that leading companies have adopted best practices that incorporate six key findings: 1 Proactive, ongoing senior management sponsorship for Procure-To-Pay initiatives 2 Collaboration. File Size - 429K	04/29/2005	Products & Services	PDF
3-D Secure Forgot Your Password Product Rules and Best Practices 3-D Secure Forgot Your Password Product Rules and Best Practices Process Flow 1: Single Cardholder Basic 2: Re-authentication Page 3b: Create Password Page 1: Password Page 1: 22/04 11:22:04 11:22:04 11:22:04 11:22:04 © Copyright 2004, Visa U. S. A. All... File Size - 1281K	10/10/2005	Systems & Operations	PDF
Visa Procure-To-Pay Best Practices - Travel & Entertainment The questionnaire was designed to gather quantitative and qualitative information including: * Qualitative: Understanding best practices, key drivers, enablers, challenges, anecdotal information, user satisfaction ratings, service level quality * Quantitative... File Size - 167K	04/29/2005	Products & Services	PDF
Commercial Procure-to-Pay Best Practices The 54 practices identified in the Visa Procure-to-Pay Best Practices study address six key areas: 1 Proactive, ongoing senior management sponsorship for procure-to-pay initiatives 2 Collaboration to ensure communication and enforcement of procure... File Size - 65K	06/28/2004	Products & Services	PDF
Visa Press Release - Visa and Industry Experts Share Best Practices for Successfully Managing Government Payment Card Programs Visa and Industry Experts Share Best Practices for Successfully Managing Government Payment Card Programs Seventh Annual Visa Government Forum Helps Empower Attendees To Maximize Cost Savings Opportunities from Purchase and Travel Cards SAN FRANCISCO, ... File Size - 26K	10/17/2005	Products & Services	PDF
Payroll Best Practices for Employer Implementation 3 Dimension the Employer Opportunity (Issuer and Employer Working Together) Outline Key Implementation and Signing Facts - Total Employees Paid-By-Check - Number of Employees Paid-By-Check by Site - Turnover Rate in Target Employee Group - New Facilities... File Size - 94K	12/19/2005	Products & Services	PDF
Visa Optional Enhancements Best Practices Issuer Benefits Issuers can use enhancements to differentiate card products from competitive offerings appeal to specific target segments increase card usage and grow revenue motivate customers to shift spending from other sources to a specific card... File Size - 177K	11/28/2005	Products & Services	PDF

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2.5.2 Keywords

Metadata Keywords influence search results, therefore it is important that each downloadable file contains appropriate Keywords.

- Keyword metadata is added under the Document Properties of the file. Refer to Section 2.5.3.
- Each keyword is a text string, with keywords/phrases separated by commas.
- As a guideline, add at least 3 and no more than 10 keywords. Consult with your VOL Content Manager if you feel that your document requires more than 10 keywords.
- Include words that may not necessarily appear in the metadata Title or within the body of the page. This improves the chances of the documents showing up appropriately in search results.
- Choose words that are specific to the product or service.
- It does not help search results to add: generic words, such as “marketing” or “card” or “product implementation.”
- It does not help search results to add: variations on phrases that repeat key words, such as “prepaid, prepaid card, healthcare, healthcare card.”
- Search does not recognize capitalization; therefore, keywords can be all lower case.
- Search ignores punctuation.
- Search looks for portions of words and typically recognizes plural forms of a word. Therefore, you do not need to include plural forms of most words (employee/employees or cardholder/cardholders) unless the plural spelling is different.

2.5.3 Adding Metadata

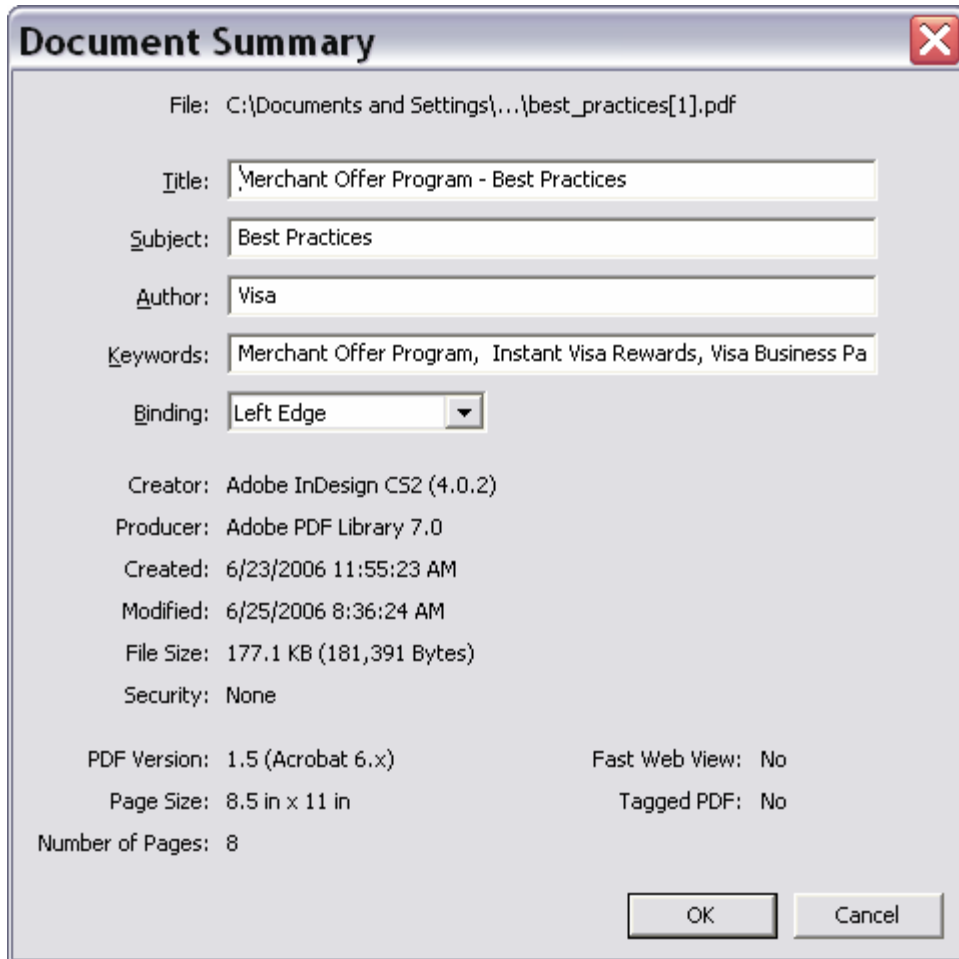
Refer to the Help documentation provided with your software for more detail on adding metadata:

1. Open the PDF file in the full version of Adobe Acrobat (Acrobat Standard/Professional, not Acrobat Reader).
2. From the main menu, select File > Document Properties > Summary
3. Enter a Title. Refer to Section 2.5.1 for requirements.
4. Enter Keywords. Refer to Section 2.5.2 for requirements.
5. Save the file.

For other file types, select the following to enter Title and Keywords:

- Microsoft Word – File > Properties > Summary
- Microsoft Excel – File > Properties > Summary
- Microsoft PowerPoint – File > Properties > Summary
- Note: Be sure to add Title and Keywords to files included in ZIP format. You cannot add metadata to a ZIP file.

2.5.3.1 Example: Document Properties Showing Title and Keywords



3 Security

3.1.1 PDF Format

- VOL recommends that most downloadable files are provided in PDF format, because it is more difficult for a user to modify the files for use out of context.
- Refer to Section 2.1 for information on valid file types for VOL.

3.1.2 Security Settings

- Security settings are not required for downloadable files published on VOL. The Content Owner (not VOL) decides the security of an individual document.
- Be sure to mention any security restrictions or requirements for content when you discuss a project with your VOL Content Manager.
- Do not create PDF documents that require a password to read. This functionality can be set up using the Entitled Link functionality available on VOL.
- If you have applied a password to prevent editing of PDF files, be sure to provide that password to the project team (agency, Content Owner, and VOL Content Manager) in case it is necessary to edit the Title or Keywords.
- If you want to provide extra security to your PDF documents (for example, to prevent printing), refer to the Help documentation provided with the full version of Acrobat.
- PDF files created with Acrobat 7.0 and saved with security cannot be read with Acrobat Reader 5.0/6.0. If you are using Acrobat 7.0 to create a PDF file and want to apply security to the document, save the PDF as version 5.0.

4 Creating Downloadable Files for VOL

4.1 Adobe Acrobat requirements

4.1.1 Full Version of Acrobat

- We recommend using the full version of Adobe Acrobat (Acrobat Standard/Professional) to create Adobe PDF files. Use the latest version that meets requirements. Note: You cannot create PDF files with the free Acrobat Reader.
- Refer to the Help documentation provided with your version of Acrobat for recommended settings.

4.1.2 Acrobat Distiller

For best results, use Acrobat Distiller to create PDF files optimized for Web use:

1. Create a PostScript file by selecting “print to file” in the original application (Word, PowerPoint, etc.)
2. Open the Adobe Acrobat application. Select Advanced → Acrobat Distiller.
3. Open the PostScript file in Distiller and convert to PDF. Refer to the Help documentation that comes with your version of Acrobat for detailed instructions.
- Note: Do not use PDFWriter or the “Convert to PDF” option within Microsoft Word since PDF files created in this way are not supported by all systems. Distiller creates a PDF file from a PostScript version of a document. A PDF file created by Distiller maintains all the formatting, graphics, and photographic images from the original document, and it provides more precise control over the conversion process than PDFWriter.

4.1.3 Save as Compatible with Previous Versions

To ensure that users with older versions of Acrobat Reader can open the PDF file, save the PDF as compatible with previous versions:

1. Choose File -> Reduce File Size.
2. Select ‘Make compatible with Acrobat 5.0 and later.’
3. Click OK.
4. Save the file to a location and overwrite the existing file.

4.2 Code Requirements

Refer to the VOL [Content Development Guide Technical Requirements](#) for more detail on requirements, including the proper HTML and [Javascript code](#) when linking to downloadable files.



5 Viewing Downloadable Files on VOL

5.1 *Browser Requirements*

Refer to [VOL Help Documentation](#) for the latest browser requirements.

5.2 *Acrobat Reader Requirements*

Refer to [VOL Help Documentation](#) for the latest Acrobat Reader requirements.

6 Troubleshooting

6.1 *Creating Files*

1. Problem: PDF file has been created with a password to prevent editing, so it can't be unlocked to add metadata.
 - Solution: If you have applied a password to prevent editing of PDF files, be sure to provide that password to the project team (agency, Content Owner, and VOL Content Manager) in case it is necessary to edit the Title or Keywords.
2. Problem: File takes a long time to download on the VOL website.
 - Solution: Make sure that the file size does not exceed VOL requirements. Refer to Section 2.2.2.
3. Problem: Users can't view or open PDF files created with Acrobat 7.0 or later.
 - Solution: Save the PDF as compatible with previous versions of Acrobat. Refer to Section 4.1.3.
4. Problem: File does not open, or unable to recognize file type.
 - Solution: Make sure the PDF file has the proper naming convention (the file name must have a .pdf file extension, and cannot contain spaces or special characters). Refer to Section 2.3.

6.2 *Downloading or Viewing Files*

Refer to [VOL Help documentation](#) for the latest system requirements and troubleshooting for users.