

Introduction to Adobe Framemaker

Warren Singer provides an overview of Adobe Framemaker and describes how to migrate your projects from Word to Framemaker.

Introduction

Framemaker is part of the Adobe Communications Suite, a professional desktop publishing suite that includes Framemaker, Robohelp, Adobe Captivate and Adobe Acrobat and other products. It is a preferred tool of choice, popular with technical communicators and certain sectors of the publishing industry. Framemaker provides the following benefits:

- Enables content management through use of conditional text, user-defined variables and book management features. This will be a great aid in enabling the sharing of content between different guides.
- Robust numbering, cross-reference and graphics handling, eliminating some of the issues with Word.
- Provides better control over content, including layout and styles.
- Enables the creation of structured content and output to multiple formats including XML, web help and responsive HTML (HTML5). This is an important feature to enable integration of content into online support sites and remove or reduce the need for manual content creation and update in HTML or markup/markdown language.
- Plugs in to existing CMS solutions such as SharePoint.
- Enables the provision of integrated content, including tutorials and videos. Adobe tools such as Captivate and Robohelp are integrated closely with Framemaker, enabling the inclusion of dynamic content.

The instructions below provide basic steps and information when using FrameMaker. If you need more detailed advice, refer to the FrameMaker online help guide maintained by Adobe.

Working with books in FrameMaker

Open a FrameMaker book

1. Go to the FrameMaker Guides folder and select the folder of the guide you want to open.
2. Double-click to Adobe FrameMaker book.

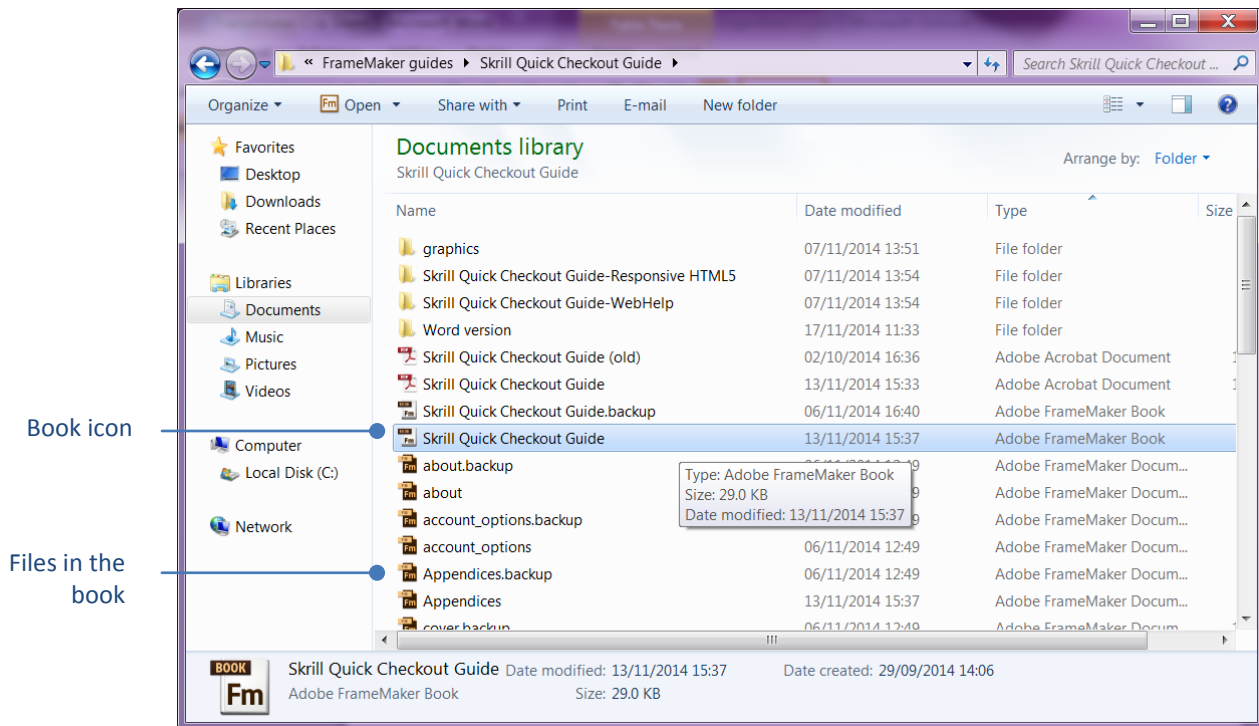


Figure 1: How to open a FrameMaker guide

FrameMaker loads, which may take some time, and displays the book.

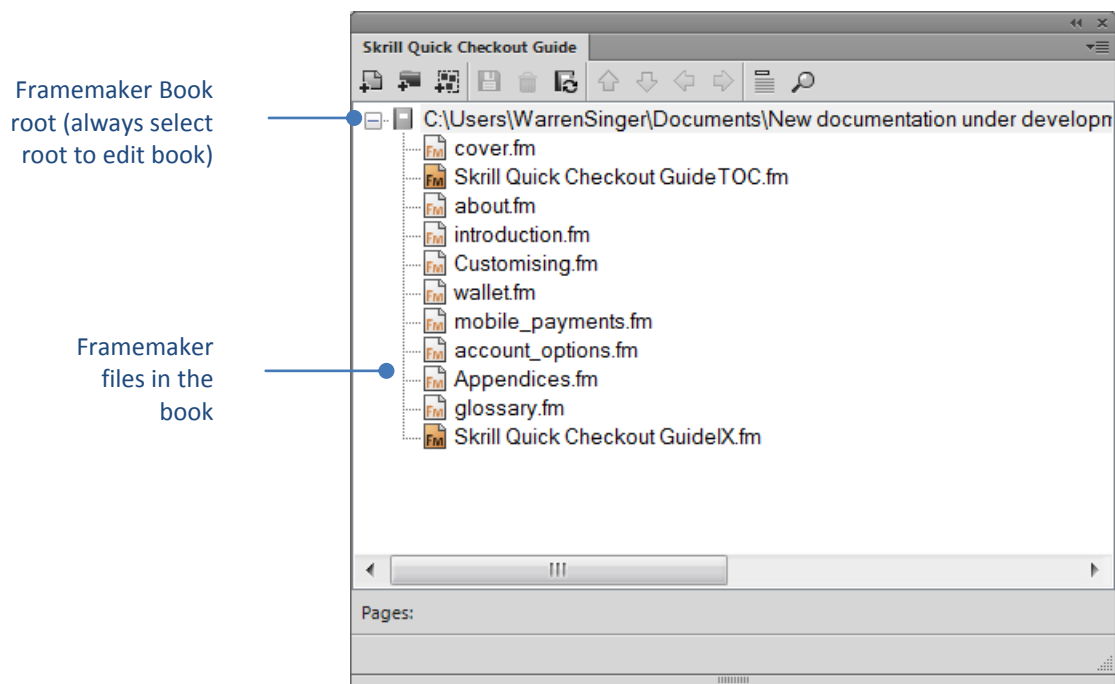


Figure 2: FrameMaker Book

Typical book structure

The above example shows a typical guide structure, containing the following files:

- Cover
- TOC (Table of contents)
- About
- Introduction
- Other chapters in the book
- Appendices
- Glossary
- Index (IX)

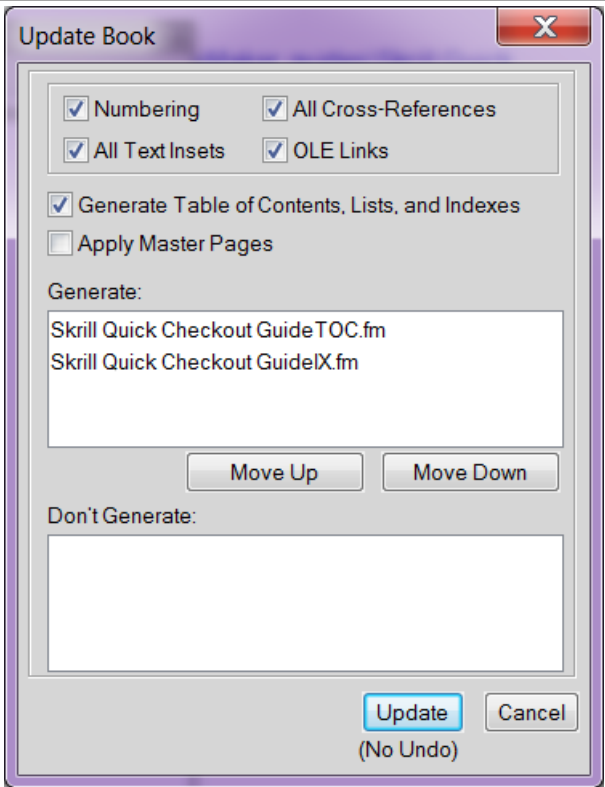
The above files are generally present for all guides, although some shorter guides may not have all these elements (e.g., you may not need appendices, glossary or an index for a short document).

Editing and updating books

Below are some quick crib tasks you may need to do.

Table 1: Quick Crib Tasks – Editing Books

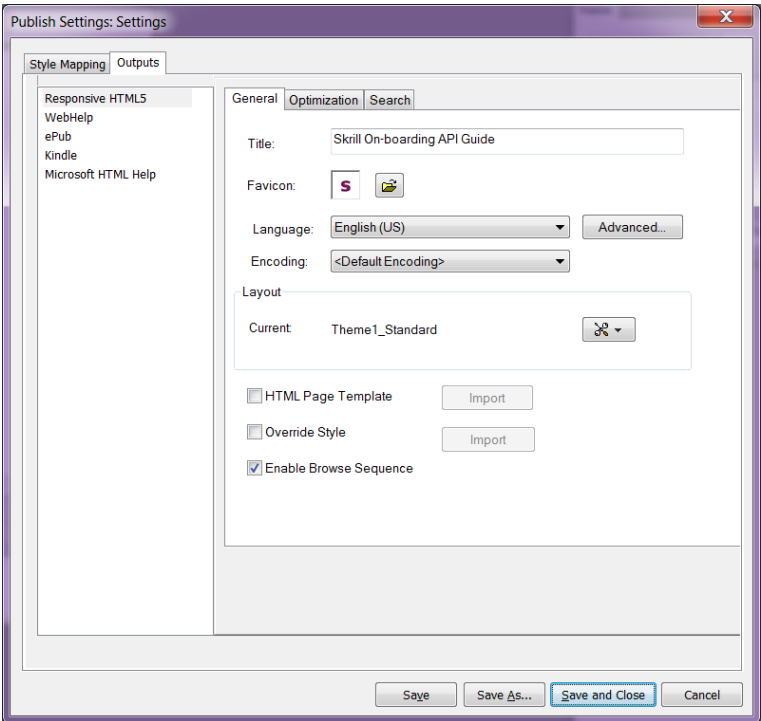
Task	Description
Delete a file	Select the file in the book and click delete.
Save	Ctrl S on the keyboard or click the Save button.
Add a file	From the menu, select Add > Files . Browse to the file(s) you want to add and click Add .
Rename a file	Right-click the file and select Rename .
Save Book as/ create a new book	<p>You can save the entire book by selecting the book (root in the book window) and then selecting File > Save Book As.</p> <p>This will create a new book and rename the TOC and IX files in the guide. You will then need to rename your TOC and IX files in Explorer so that they will be picked up by the new book.</p> <p>Delete any files not required in the new book.</p>
Save File as/ create a new chapter	Double-click to open the file and then select File > Save as .
Update a book	Select the book and then from the menu, select Edit>Update Book . Check the numbering, cross reference, OLE links, TOC and index as shown below and then click Update .

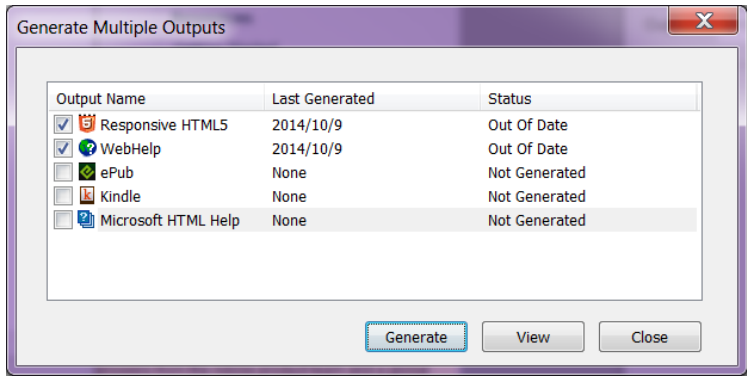
Task	Description
	 <p style="text-align: center;"><i>Figure 3: Update Book</i></p> <p>Note: Warnings generated when updating are added to the Book Error Log. Conditional settings and colour definition errors can be ignored. You should update any broken cross-reference errors.</p>
Save as PDF	<ul style="list-style-type: none"> • Select the book root and from the menu select File > Save as PDF. • Make sure the View Generated PDF in Acrobat option is checked. Leave everything else as is. • If you want to switch off the PDF bookmarks (displayed in the left-hand pane in Acrobat), click the Bookmarks tab and then uncheck the Generate PDF Bookmarks option. This is only recommended for very short documents. Most guides should have bookmarks enabled.
Save and close all open files	<p>From the menu, select File > Currently opened files. Select All and click the Save and Close button.</p>

Publishing and archiving books

In addition to producing PDF versions of a book, you can publish multi-channel versions (Responsive HTML and WebHelp), as well as create an archive of your changes.

Table 2: Quick Crib Tasks – Publishing and Archiving Books

Task	Description
<p>Publish a book</p> <p>Select the <i>Responsive HTML5</i> and <i>WebHelp</i> options and update the <i>Title</i> field.</p> <p>Leave other options as shown in the figure</p>	<ul style="list-style-type: none"> Select the book root and from the menu select File > Publish. Update the Output path by clicking the Browse Output Path button and selecting the folder for the output. Click the Settings button and select Edit Settings. Update the Title field with the name of the book. Make sure you do this for both the WebHelp and Responsive HTML 5 options (displayed in the left-hand pane). Then click Save and Close.  <p>Figure 4: Publish Settings</p> <ul style="list-style-type: none"> In the Publish dialog box, select Generate Multiple Outputs. Ensure that the options are checked and click Generate. To view the output, click View.

Task	Description
	 <p><i>Figure 5: Generate Multiple Outputs</i></p>
Create an Archive	<p>Select the book root and from the menu select File > Package. Check the option Create Package even if files are missing and then click Package.</p> <p>This creative a zip file containing all the latest files and graphics in the book. You should then upload the zip to a secure location, to ensure that a backup is available.</p>
Advanced publishing options	<p>If you need to configure the style sheet or template, you can do the following:</p> <ul style="list-style-type: none"> • Select the book root and from the menu select File > Publish. Click the Settings button and select Edit Settings. Select the Outputs tab. • <i>Add a favicon</i>: in the Favicon field, select the Browse option and select a favicon. • <i>Responsive HTML layout</i>: The current theme should be Theme1_Standard. To edit, select the Edit button. • <i>Change the WebHelp skin</i>: select the Navigation tab and in the Skin Selection field, select a skin or alternatively, click Import. Then browse to the location of the skin and select the skin (zkn) file.

Working with files

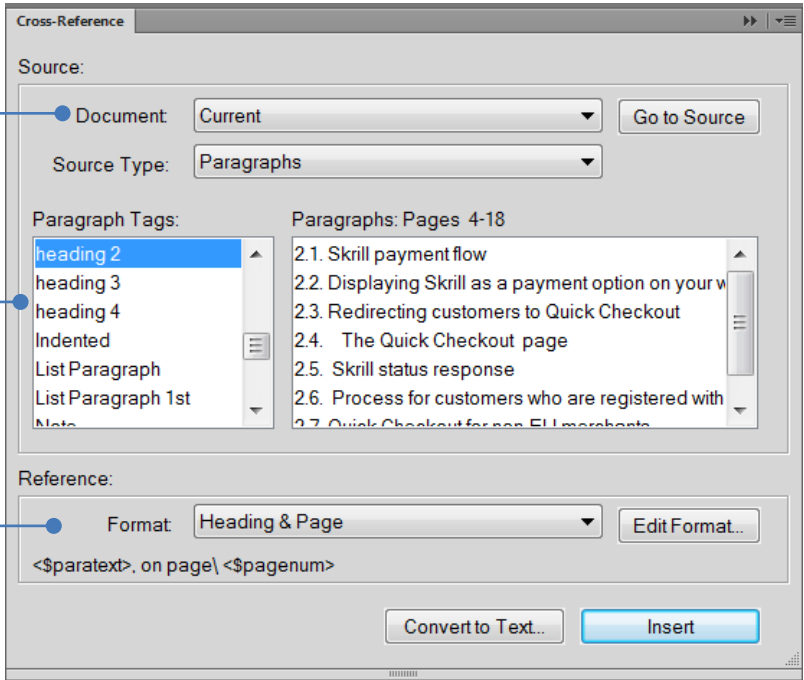
The instructions below relate to working with files. To open a file in FrameMaker, open the book and then double-click the file.

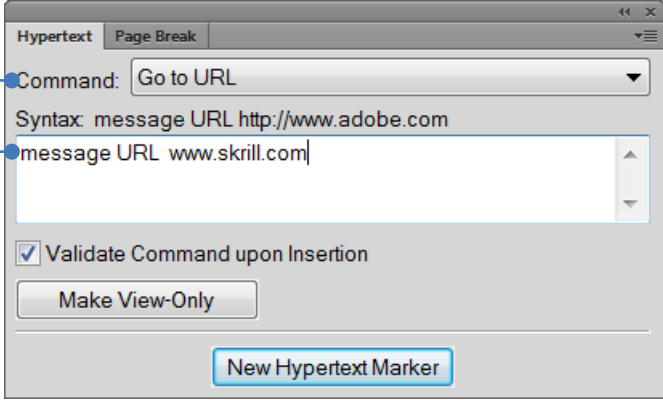
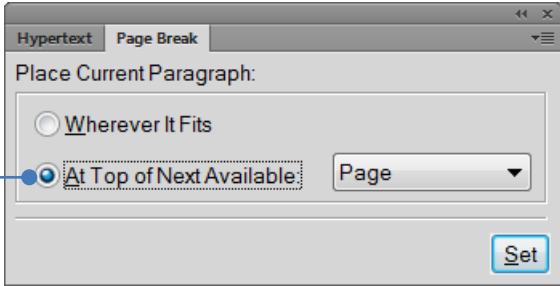
Editing files

See the table below for the most common options.

Table 3: Quick Crib Tasks – Editing Files

Task	Description
Rename file	In the book, right-click the file and select Rename .
Save as	Ctrl S on the keyboard or click the Save as button.
Paragraph formatter	Click in the paragraph you want to format. From the menu, select Format > Paragraphs > Designer (or press Ctrl +M)
Character formatter	Select the word or phrase you want to format. From the menu, select Format > Characters > Designer (or press Ctrl +D)
Paragraph Quick Style selector	<p>Press F9 on your keyboard. Examples of styles you can create for your book:</p> <ul style="list-style-type: none"> • Body_text – use for all regular body text • Bullet_list – use for a bulleted list • Figure – use for a figure title, displayed beneath the figure • Heading 1, Heading 2, Heading 3, Heading 4 – standard numbered heading styles • Heading – use for non-numbered headings • List paragraph – use for numbered lists • List paragraph 1st – use for first number in a list • Note – use for a note style. • No spacing – use for an extra space, typically below a figure title • Table_text – use for table text • Tabletitle – use for the table title, displayed above the table • Table_heading – use for table headings
Character Quick Style selector	<p>Press F8 on your keyboard. Examples of styles:</p> <ul style="list-style-type: none"> • Default Font – use to clear any previous character formatting • Bold – use to bold a word, e.g., menu or button option • Emphasis – use to emphasise a word, e.g., a field name or parameter

Task	Description
	<ul style="list-style-type: none"> • Glossary term – use for a glossary reference • reference – use for a cross-reference
<p>Cross references</p> <p>Leave as Current if you are linking to a topic in the current file. Otherwise, select the file you want to link to</p> <p>Select a paragraph tag style and then select the topic to reference to</p> <p>Select the format in which to display the cross reference (e.g. Heading & Page)</p>	<ul style="list-style-type: none"> • From the menu select Special > Cross reference. • Select the relevant paragraph tag in the left-hand pane and the topic you want to cross-reference in the right-hand pane. • In the Format field, select Heading & Page (this will add a cross-reference with the topic heading and the page). • Select Insert or Replace.  <p>Figure 6: Cross-references</p> <p>Once added, all cross-references are automatically updated when you regenerate or update the book.</p>
Hypertext links	<ul style="list-style-type: none"> • From the menu select Special > Hypertext. • In the Command field, select Go to URL. • Add the URL after the text message URL, as shown below. • Click New Hypertext Marker.

Task	Description
<p>Select Go to URL</p> <p>Enter the URL after the words "message URL"</p>	 <p><i>Figure 7: Hypertext Marker</i></p>
<p>Page break</p> <p>You can define where you want the page break to start</p>	<ul style="list-style-type: none"> From the menu select Special > Hypertext. Select At Top of Next Available Page and click Set.  <p><i>Figure 8: Page Break</i></p>

Working with graphics

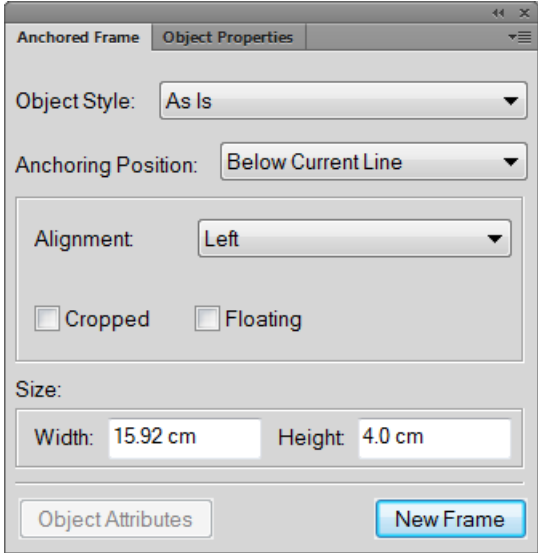
Graphics are always contained within a frame, so when adding a graphic, always add it to a new or existing frame.

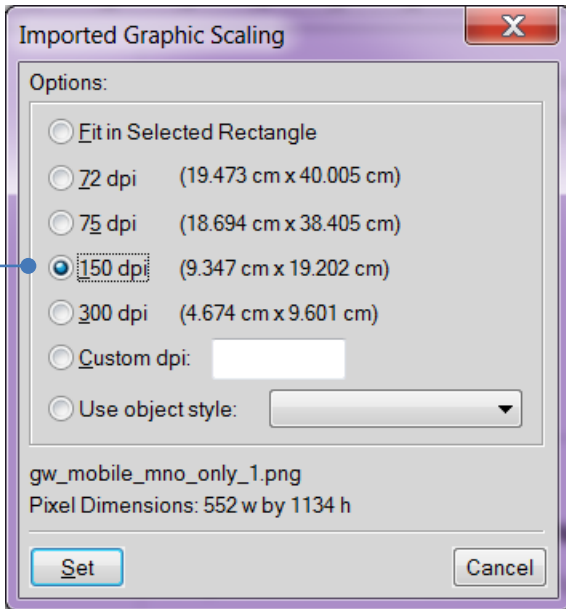
You are recommended to put the graphic source into the graphics folder of the guide and then link it by reference. Linking enables a single graphic file to be referenced and used in multiple locations in the same or different guides. If you update the source file, the graphics in the guide are then automatically updated.

Note: Do not embed graphics as this adds to file sizes and can make it slow to work with files.

See the table below for the most common options.

Table 4: Quick Crib Tasks – Graphics

Task	Description
<p>Create a frame for a graphic</p> <p>Anchor Position Below Current Line and Alignment centre.</p>	<p>The frame is the placeholder in which the graphic will be inserted.</p> <ul style="list-style-type: none"> From the menu select Special > Anchored Frame. Anchored Position should be Below Current Line. Alignment should be Center. Leave other options as shown in the figure below and click New Frame.  <p>Figure 9: Anchored Frame</p> <p>You can resize the frame after you have added it.</p>
Import a graphic	<ul style="list-style-type: none"> First copy the graphic source file to your <i>Graphics</i> folder. Files are typically in <i>png</i> or <i>jpeg</i> format. Select the anchored frame and from the menu select File > Import > File. Browse to your <i>Graphics</i> folder and select the graphic you want to import. Click Import. Select 150 dpi and click Set.

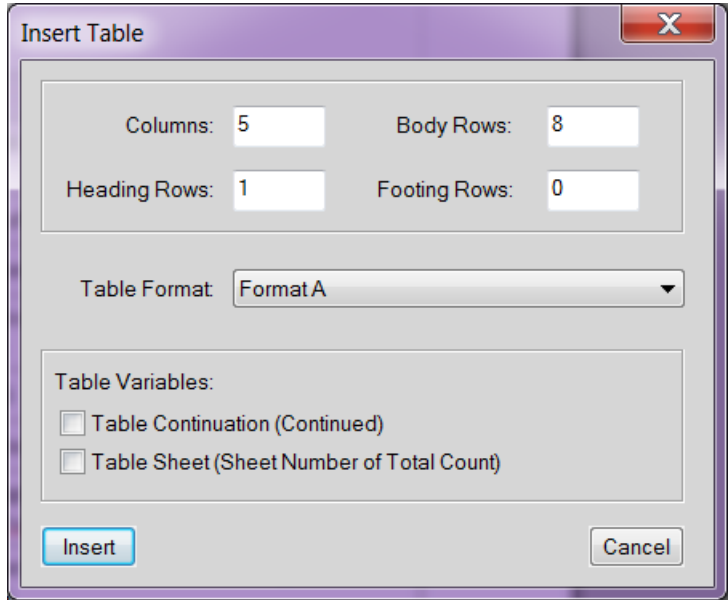
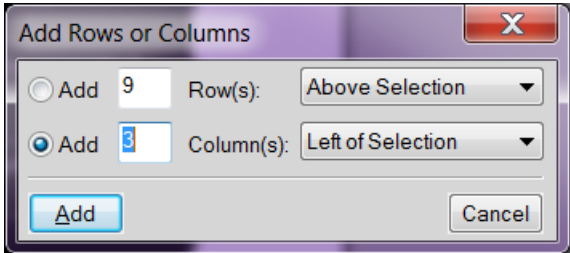
Task	Description
<p>Typical resolution is 150 dpi (dots per inch). You can adjust the graphic size after</p>	
Edit a graphic	Right-click the graphic and select Object Properties .
Edit a frame	Right-click the frame and select Object Properties . Frame should be 5pts above baseline.
Create a figure title	Create a paragraph marker below the graphic, press F9 on your keyboard and then select the Figure style.
Graphics toolbar	From the menu, select Graphics > Tools .
Add a callout to a graphic	<p>Select your graphics frame and on the Graphics toolbar, select Add a text frame. Use your mouse cursor to place and size the text frame, then add to text to it.</p> <p>To format the text, press F9 and then select the style Callout-left or Callout-right</p>

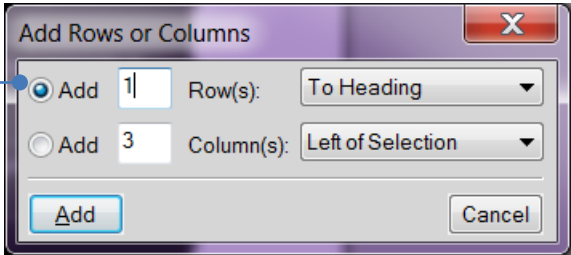
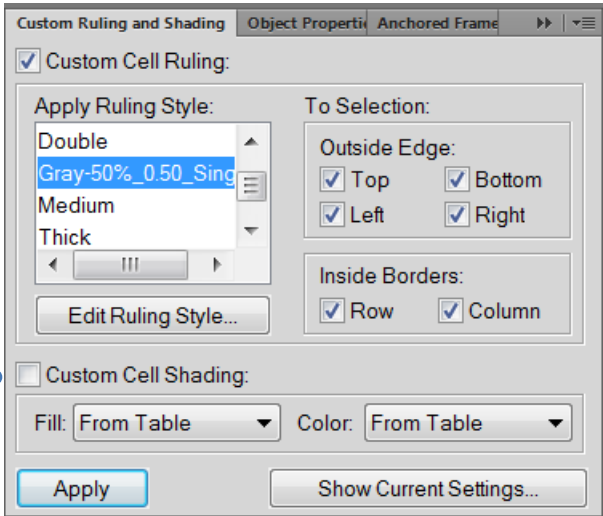
Working with tables

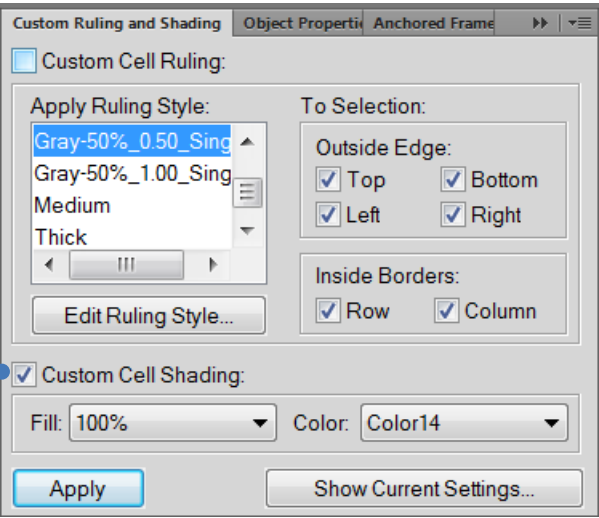
The easiest way to create a new table is to copy an existing table and then format and update it.

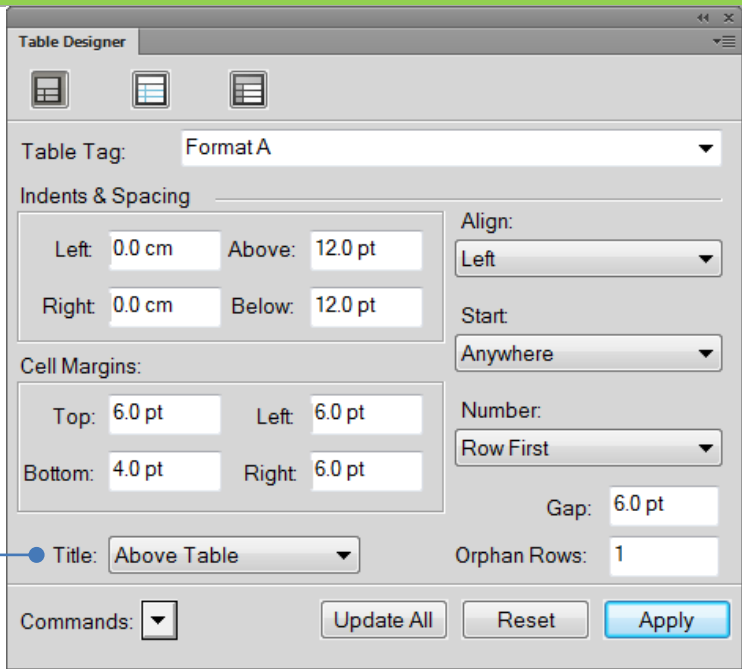
See the table below for the most common options.

Table 5: Quick Crib Tasks – Tables

Task	Description
Insert a new table	<ul style="list-style-type: none"> From the menu, select Table > Insert Table. Enter the number of Columns, Body Rows and Heading Rows required. Select a Table Format and click Insert.  <p style="text-align: center;"><i>Figure 10: Insert Table</i></p> <p>You can edit the table after you have inserted it.</p>
Add Rows or Columns	<p>Right-click, and select Add Rows or Columns.</p> <p>Select the number of rows or columns to add and click Add.</p> 

Task	Description
	<i>Figure 11: Add Row or Column</i>
Add a table heading row	<p>The heading row will appear at the top of each page, when a table runs over more than one page.</p> <ul style="list-style-type: none"> Right-click, and select Add Rows or Columns. Select Add 1 Row(s) To Heading.
Add a Row To Heading.	 <p><i>Figure 12: Add a Heading Row</i></p>
Customize table borders	<p>The procedure below will standardise the table cell borders for all body rows in the table.</p> <ul style="list-style-type: none"> Select the table body rows and then right-click and select Custom Ruling and Shading. Table borders in the guides are Gray_50%_0.50_single, as shown below. Uncheck the Custom Cell Shading option and click Apply.
Make sure this option is unchecked when adding table rows, as you don't want any internal shading applied	 <p><i>Figure 13: Custom Cell Ruling – Table rows</i></p>
Customise table heading shading	<p>This procedure shows how to apply the standard light purple style to the table heading.</p> <ul style="list-style-type: none"> Select the table heading row and then right-click and

Task	Description
	<p>select Custom Ruling and Shading.</p> <ul style="list-style-type: none"> Table borders in the heading are also Gray_50%_0.50_single, as shown below. Check the Custom Cell Shading option and select Fill 100% and Colour as Color14. Click Apply. <p>Check this option to configure cell shading to the select rows.</p>  <p><i>Figure 14: Custom Cell Ruling and Shading – heading row</i></p>
Straddle rows	Right-click the cells in the table row and select Straddle . (similar to merge cells on MS Word)
Open the Table Designer	Select and then right-click the table, and select Table Designer .

Task	Description
	 <p>The tables in the guides typically have a tile above the table.</p> <p>Figure 15: Table Designer</p>
Add a table title	<p>The title page appears at the top, above the table, and on each page, if the table breaks across multiple pages.</p> <ul style="list-style-type: none"> To add a title, in the Table Designer, in the Title field, select Above Table (as shown in the figure above). Click Apply.
Format table text	Press F9 on the keyboard and then select TableTitle .
Format table heading text	Press F9 on the keyboard and then select Table_heading .
Format table title text	Press F9 on the keyboard and then select Table_text .

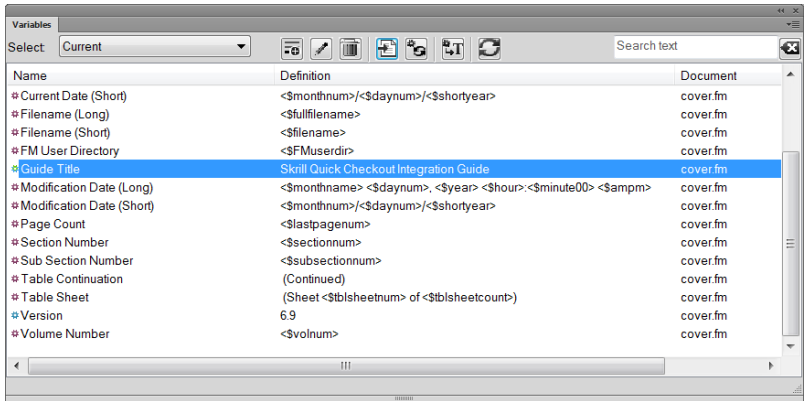
Variables and document properties

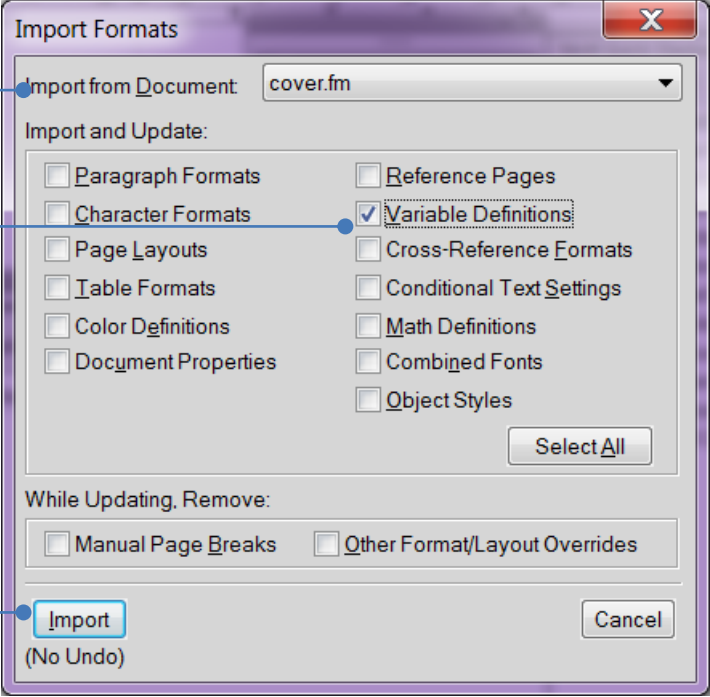
Variables enable you to create document properties that can be shared across files and updated from one source. Typically, variables in the guides are first defined in the *Cover* file and then imported to other files in the book. The following are examples of typical variables used in the guides:

- **Guide Title** – use this variable to edit/update the guide title, which appears in the cover and header of each page in the guide.
- **Version** – use this variable to define the version of the guide, which appears in the cover and header of each page in the guide.
- **Current Date Short** – used as part of the unique publication number at the end of the cover. Will always reflect the current date of publication

See the table below for the most common options.

Table 6: Quick Crib Tasks – Variables

Task	Description
<p>Open the Variables pod</p> <p>Variable pod showing FrameMaker and custom-defined variables.</p>	<ul style="list-style-type: none"> • You can either double-click an existing variable in a document or from the menu, select Special > Variables.  <p>Figure 16: Anchored Frame</p> <p>You can resize the frame after you have added it.</p>
Edit a variable	<ul style="list-style-type: none"> • In the variables pod, select the variable you want to edit and click the Edit (pencil) button. • In the Definition field, enter the updated definition text and click Enter.
Import variable definition	<p>Make sure the updated Cover.fm file is open before starting this procedure.</p> <ul style="list-style-type: none"> • To copy the updated variable definition from the <i>Cover</i> file to other files in the book, in the book, select all files and then from the menu select File > Import > Formats. • In the Import from Document field, select your

Task	Description
<p>Select <i>Cover.fm</i> or the file where you have updated the variables.</p> <p>Select Variable Definitions only.</p> <p>Click Import.</p>	<p>Cover.fm file.</p> <ul style="list-style-type: none"> Click Deselect All and then click Variable Definitions. Click Import. The variable definitions will be copied from the Cover file to other files in the book.  <p style="text-align: center;"><i>Figure 17: Import Formats</i></p>

Migrating files from Ms Word to FrameMaker

Why migrate from Word to FrameMaker?

Microsoft Word is often preferred as the desktop publishing tool of choice because of its wide availability within most organisations and the ease with which it enables the creation and update of documentation. Guides created as Word documents can be made available to customers though publication to PDF format.

Despite these benefits, Word is not a professional desktop publishing tool and the functionality available with it is limited. In particular:

- Handling of large documents is problematic and prone to corruption
- Numbering and cross-referencing formatting is easily corrupted

- There are limited content management options available with Word. This means that content must be copied and pasted and reworked between different versions and different output formats.
- When an organisation has dozens of guides, with alternative versions of each guide, plus content in both online and PDF formats makes using Word a time-consuming process. This will not be sustainable for a future architecture that includes translation.

If you have a source file in MS Word which you want to migrate to FrameMaker, the recommended procedure is as follows:

Step A. Create a new FrameMaker book

1. Create a new folder for your guide and copy the relevant files from an existing FrameMaker guide.
2. Open the guide book you have copied and select **File > Save Book As**. Enter the name of your new book.
3. Delete any files not needed in your new book. You can also delete these files from your book folder.
4. Rename your IX (index) and TOC (Table of Contents) files to match the names referenced in your new book.
5. Open the Cover of the book and update the title, description, version number, version history table and publication number. Some of these are variable fields, which can be editing using the **Variables** pod.
6. Apply the variable definitions to other chapters in your book (select all other chapters, then **File > Import > Format** and select **Variable Definitions**)
7. Update the **About** chapter with details for your new guide.
8. Leave the TOC for the moment, it will be automatically updated when you update the book.

Step B. Copy text and images to your new guide

1. Open the Introduction file of your new book and delete all the existing text, then save your file. Leave it open.
2. Open your source MS Word file and Select All (Ctrl +A) and then copy (Ctl +V).
3. Paste the contents into your FrameMaker Introduction file. This may take some time, so leave it to do its work. The more graphics you copy, the longer it will take.

Step C. Apply correct style formats to your content

1. Apply the correct styles to the content, using the F9 and F8 style options.
2. You can use the global update option in the Paragraph Designer to update all instances of a style in your document.
3. Replace embedded graphics with linked graphics in your *Graphics* folder.
4. Apply correct table style using the Table Designer then apply custom ruling and shading to the table borders and heading. Update the table text styles.
5. Replace all cross-references in the guide and check that there are no broken links (which will show in the Error Log when you update the book).
6. If you need to create additional chapters, save the Introduction file as a new file and then add to the guide (select book root and from menu, select **Add > Files**). Then delete the previous contents and copy and paste the new chapter content. Repeat the steps above for the new chapter.

Step D. Update book and publish

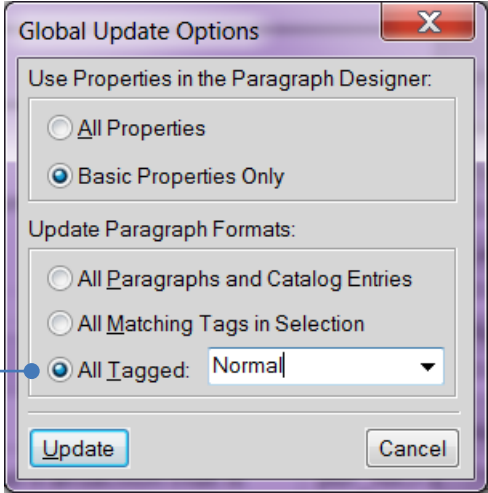
1. On book level, for each chapter, paragraph numbering must be set to restart, so that figure number restarts for chapter.
2. When the new book is ready, select the book root and then select **Edit>Update Book**. Check the Error Log for any broken links. You can ignore any warnings about colour definitions and conditional tags for the moment.
3. Select the book root and then **File > Save as PDF**. Select the option **View Generated PDF in Acrobat**. Check the generated PDF for errors, and then fix and update the book again, and regenerate the PDF.

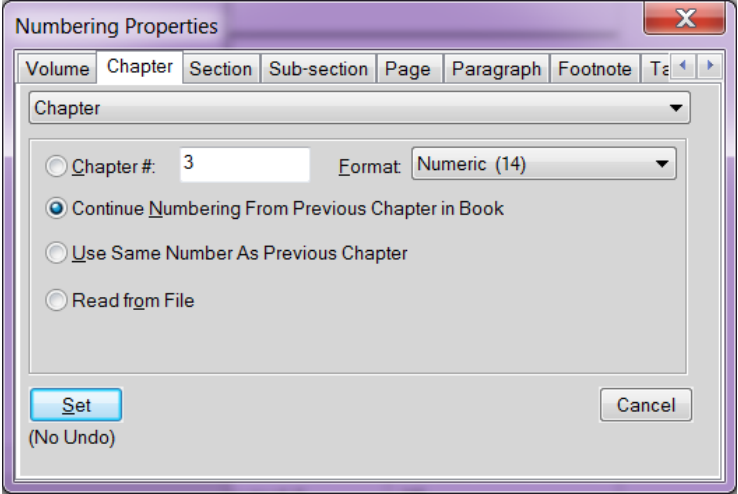
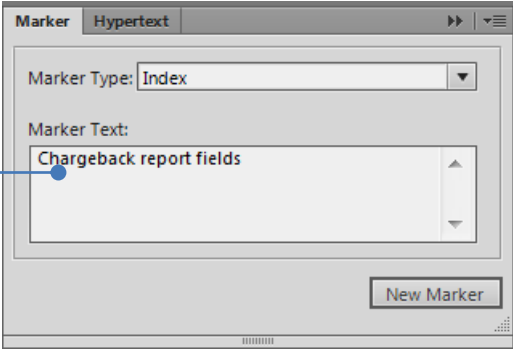
Advanced options

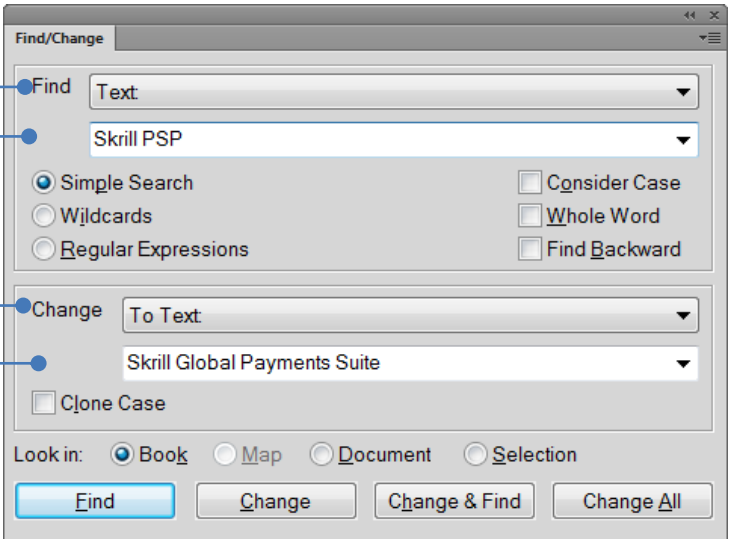
See the table below for advanced options you may need to use.

Table 7: Quick Crib Tasks – Advanced Migration options

Task	Description
Global Formatting Update –paragraphs)	<p>The procedure below describes how to update all instances of a style in a file (e.g., <i>normal</i>) to one of the standard styles used in the guide (e.g., <i>body_text</i>).</p> <ul style="list-style-type: none"> • Select the paragraph you want to update. From the menu, select Format > Paragraphs > Designer (or press Ctrl + M). • In the Paragraph Tag field, select the new style you want to apply to the paragraph (e.g., <i>body_text</i>) and click Apply. • Click Commands > Global Update options. • In the All Tagged field, enter the name of the old style

Task	Description
<p>Enter the name of the paragraph style you want to update.</p>	<p>instances you want to update (e.g., <i>normal</i>) and click Update.</p> <p>All paragraphs in the file with style <i>normal</i> will now be updated to style <i>body_text</i>.</p>  <p>Figure 18: Global Update Options</p>
Global Formatting Update – characters)	<p>You can use the character designer to globally update all instances of a character style, using the same procedure as described above.</p> <ul style="list-style-type: none"> • Select the character style you want to update. From the menu, select Format > Characters > Designer (or press Ctrl + D). • In the Character Tag field, select the new style you want to apply to the character (e.g., <i>emphasis</i>) and click Apply. • Click Commands > Global Update options. • In the All Tagged field, enter the name of the old style instances you want to update and click Update.
Set chapter numbering	<ul style="list-style-type: none"> • You can use this option to ensure that the new chapter numbering continues from the previous chapter. • Open your FrameMaker book and right-click the chapter you want to renumber and select Numbering. • Make sure the option Continue Numbering from Previous Chapter in Book is selected.

Task	Description
	 <p><i>Figure 19: Numbering Properties</i></p>
<p>View Master Page layout</p> <p>(edit header and footer)</p>	<p>Master Page layout enables you to edit the template content of the file, such as headers and footers.</p> <ul style="list-style-type: none"> • From the menu, select View > Master Pages. • To switch back to body view, select View > Body Pages.
<p>Create an Index Marker</p> <p>Enter text to display in the Index</p>	<p>You can create an index marker, which will appear in your guide Index.</p> <ul style="list-style-type: none"> • From the menu, select Special > Marker. • Select Marker Type of <i>Index</i>. • In the Marker Text field, enter the name of the text you want to be displayed in the Index. • Click New Marker.  <p><i>Figure 20: Index Marker</i></p>

Task	Description
Edit an Index Marker	<ul style="list-style-type: none"> From the menu, select View > Pods > Markers. Select the Index marker and click the Edit (pencil) button. In the Marker dialog box, update the marker text and click Edit Marker.
Find and replace	<p>Framemaker enables you to find and replace not only text, but also tags, styles and unresolved-cross references. Changes can be applied to a file or all chapters in a book.</p> <ul style="list-style-type: none"> From the menu, select Edit > Find/Change. <div> <div> Select tag or property you want to find Enter text you want to find Select new tag or property Enter new text </div>  </div> <p><i>Figure 21: Find/Change dialog box</i></p>

