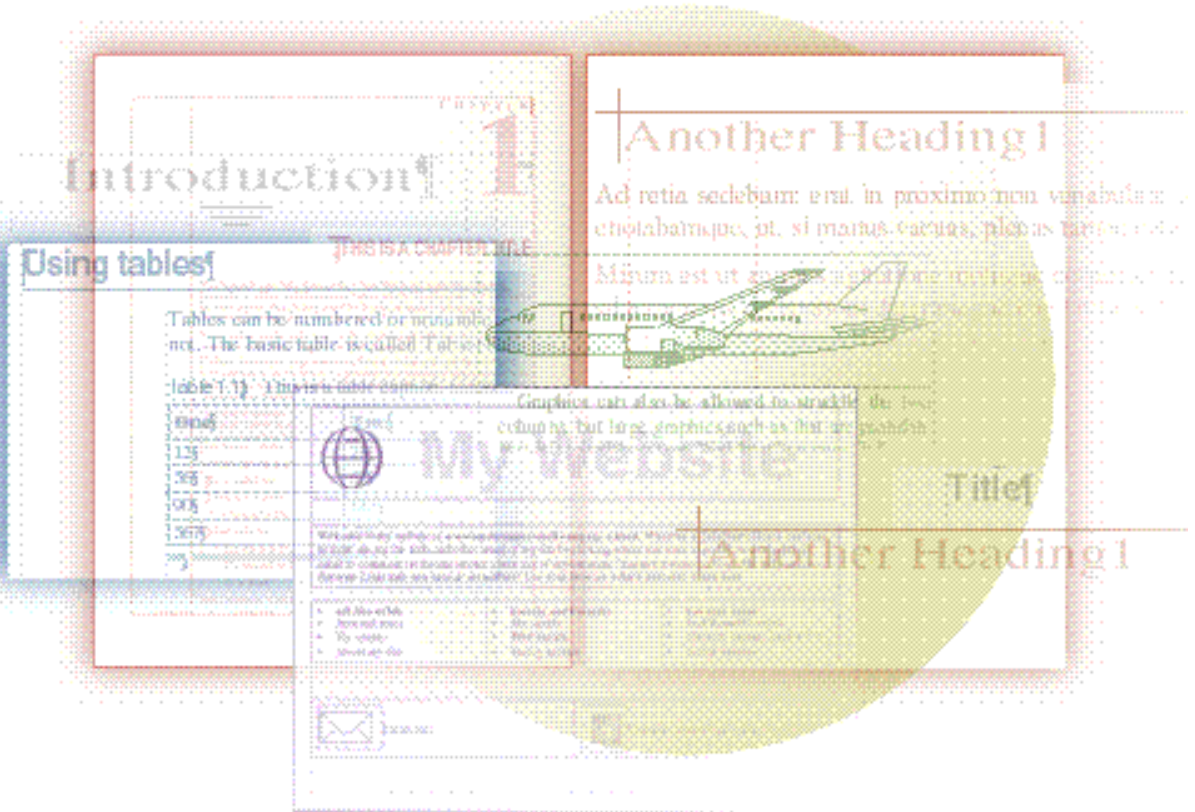




Adobe® FrameMaker® Template Series

Template Pack 1 Guide



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Primer and template guide design by Bobbi Long.

Template Pack 1: Books and Manuals

This pack contains nine basic templates for creating long documents. Although these templates were designed with software and hardware manuals in mind, you can easily modify them for use as general purpose books, manuals, training guides, or virtually any multi-chapter document. Each template folder, if appropriate, actually combines several templates together in a book file: TOC, chapter, appendix, and index. You'll find each template enhanced with powerful paragraph, character, table, and cross-reference formats; color definitions; variables; special sidebars; HTML mappings; as well as background graphics and text.

This packet of templates includes the following:

- ◆ BkStyle1: This is designed to keep page count down.
- ◆ BkStyle2: This template features prominent headings and generous white space without increasing page count.
- ◆ BkStyle3: This is designed for a book that needs to number chapters, appendices, illustrations, etc., independently.
- ◆ BkStyle4: This template is ideal for laser-printed software manuals, training guides, tutorials, and instructional material.
- ◆ BkStyle5: This is the same template as BkStyle2, but with running thumb tabs on recto pages.
- ◆ BkStyle6: This is intended for the small manuals that accompany TVs, VCRs, and similar consumer hardware.
- ◆ BkStyle 7: This mimics the pre-5.5 FrameMaker manual.
- ◆ BkStyle 8: This is the template we used for this digital series.
- ◆ BkIntl: This template is meant for instruction sheets or step-by-step guides where the contents must be in three languages.

format and is set so that graphic and caption always remain on the same page.

Use `Numbered.intro` to introduce numbered steps. It resets numbered steps to 1, so it's vital to apply it before each unique series of numbered steps. Use it for the "to do this" statement before each set of steps.

The `Query` paragraph format lets you insert queries to document reviewers in a standard format that is easy to search for and remove later when the document moves on to production. There is also a `Query` character format you can use within paragraphs.

Use `Typed-in.para` to indicate a paragraph the user must type. A character format called `Typed-in.text` does the same for text within a paragraph.

The `Bullet`, `Number`, and `TipIcon` character formats are used by other formats. You won't deal with them unless you need to redefine the `Bulleted`, `Numbered`, and `Tip` paragraph formats.

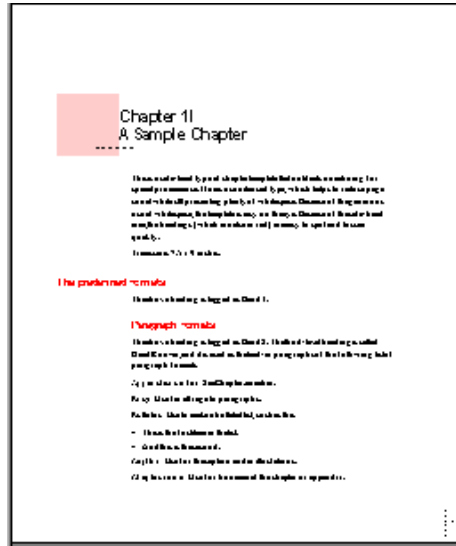
Making it your own

As mentioned, this template uses small point sizes to reduce page count. To retain legibility, be sure you use a body font that prints well at small point sizes on the printer you'll be using.

➤ With this and most of the other templates, be sure to save the original file under a new name and then delete the sample text. This text demonstrates and describes the template's formats so you'll want to keep it available.

The `Tip` paragraph format uses an asterisk as a dingbat instead of a character from a symbol or dingbats font, as is usually done. You can change this by redefining the `TipIcon` character format to be the desired dingbat font and then replacing the asterisk with the appropriate character in the `Autonumber Format` box of the `Tip` format's `Numbering` property in the `Paragraph Designer`. You should also change the `Stretch` setting of `TipIcon` back to 100% in the format's `Default Font` property.

BkStyle2 outdents numbering and extends some headings into the side-head area for special prominence. These numbers and headings also use spot color so they remain easy to spot and scan quickly. BkStyle2 uses a condensed type, which helps to reduce page count while still presenting plenty of whitespace. Because of the generous use of whitespace, the template is easy on the eye.



Headings
easy to spot
and scan

The design includes templates for a table of contents, chapter, and index, all organized within a sample book file. The general look incorporates a one-column layout flanked by a side-head area into which some headings extend so the reader can easily scan through the sections of the finished document to find material of interest. The side-head area also provides whitespace so the over-all impression given by the layout is one of openness. The template provides several tables, cross-reference formats, and, in general, the same collection of paragraph and character formats as BkStyle1. The trim size is 7.5 by 9 inches.

Nut & bolts

The paragraph and character formats are virtually identical to those of BkStyle1, at least in name and purpose. Note especially the

Numbered.intro paragraph you must use before any numbered steps to reset the series.

The special Query, Typed-in.para, and Typed-in.text formats from BkStyle1 are among the usual formats. You'll also find the Illo+Caption format for use as a way to keep anchored frames with their captions on the same page. BkStyle2 includes a special Warning table format you can use for warnings and other important paragraphs you want to emphasize.

The dotted line under the chapter name is on a reference page.

Making it your own

Besides changing fonts to something more interesting than Times and Helvetica, you could also change the spot color used. We used a simple default bullet symbol you might want to change. Just redefine the BulletSymbol character format to reflect a dingbat font you have installed. Then replace the \b with the appropriate character in the Autonumber Format box of the Bulleted format's Numbering property in the Paragraph Designer.

Note the use of an anchored frame for an icon or graphic in the side-head area on page 4 of the BkStyle2 template. You can use this technique to emphasize a tip or note. Insert an anchored frame at the beginning of the paragraph outside the column at the left. The FrameMaker clip art collection (accessible through Help > Samples & Clip Art) provides many symbols and other graphics you can use for this purpose. Copy and paste one into the frame.

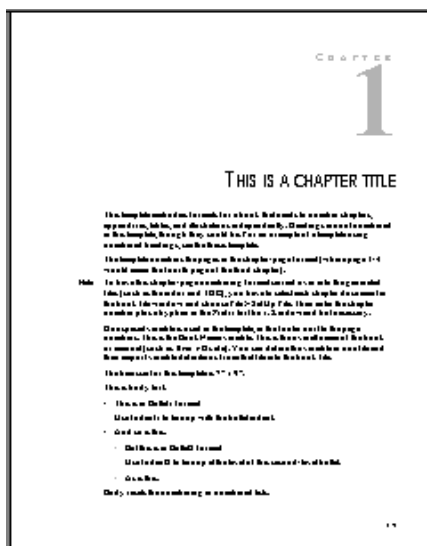
You might want to change the default dotted line we used under the chapter title. Go to the first reference page (View > Reference Pages) and change the characters in the frame called Chapter Dots. You may have to open the Paragraph Designer when the insertion point is in the dots and change the font (for example, to a dingbat font) to use the character you want.

BkStyle1 uses a single color for some formats. If you are not printing in color, make sure you print to a printer that can print colors as grayscale or change the color AccentColor to a shade of gray in View > Color > Definitions. All the colored text and symbols will take on the new hue. This is a good example of the importance of generally naming character formats and colors for their function, rather than for their type style or hue. This lets you change the

underlying definition of the format or color without being forced to change the name as well.

Book Style 3

This style combines a one-column format with a more complex autonumbering scheme than seen in the first two book style templates. This template numbers chapters, appendices, tables, and illustrations independently. The template also numbers pages in the chapter-page format (for example, 3-4 means page four of chapter three) which is preferred by some designers or pubs departments.



Complex
autonumber
schemes

BkStyle3 offers separate autonumber series for chapters, appendices, tables, and figures and creates generated lists for tables (LOT) and figures (LOF) as well as the TOC. There are five table formats already defined and a variety of cross-reference formats. Read through the notes in the template itself for details.

Nuts & bolts

Most of the formats are self-explanatory, but note the greater complexity found in the formats. Bulleted lists can contain secondary bulleted lists indented from the first level. The Bullet2 format lets you insert secondary level bulleted items. Indent1 and Indent2 let you add unbulleted paragraphs within a bulleted list that line up

with the appropriate bullet level. Similarly, Numbered2 lets you insert indented numbered lists within numbered lists formatted with Number. Indent1 and Indent2 also work in numbered lists.

Note how the Head1-leftside and zHead-rightside paragraph formats are combined or linked to create a head with a note or explanatory text (in a different typestyle and point size!). zHead-rightside also combines with Head2-leftside for the same effect.

To add text in the sidehead area of this template, use the SideWords paragraph format. To place graphics or icons instead of text, insert an anchored frame positioned at the outside of the column on the left side rather than a special format.

Special character formats you should note include Code and SymbolFont. Use Code for formatting programming code or text the user must type. Use SymbolFont to format characters in the Symbol font for special characters such as pi, arrows, or other mathematical symbols.

The template's mechanism for dealing with graphics differs from the formats used in the previous two book style templates. BkStyle3 assumes that every graphic in the body column (not in the side-head area) has a caption. To add a graphic, format a blank paragraph as IlloCaption (IlloCaptionApp in appendixes), type the caption, and then immediately import a graphic or insert an anchored frame without pressing Return.

Making it your own

Change the BookName variable (Special > Variable) to reflect the name of your document. The template uses this variable in footers.

You can change the color used for second-level bullets or numbers in the zBulletGray and zAuto#Format character formats.

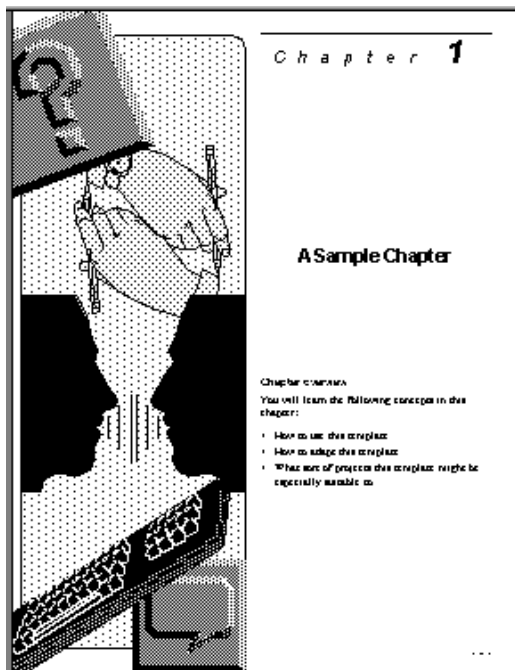
You may need to change the width of the side-head area depending on the point size of your type and how you plan to use this area. If you want to insert graphics or longish notes, the current five-pica width is probably not enough. To change it, switch to master pages (View > Master Pages), and choose Format > Page Layout > Column Layout. Enter a new value for the amount of room given to the side-head area. Then click the Update Entire Flow button. You cannot Undo this, so to protect yourself, be sure to Save the file just

before you change the space reserved for the side-head area. Then you can choose File > Revert to Saved to “undo” the width change if it proves inappropriate.

The chapter-page page numbering scheme used in the template must be set for each document in the book file by selecting each document in the book window and choosing File > Set Up File. Then enter the chapter number and a hyphen in the Prefix box.

Book Style 4

This template is geared toward laser-printed student guides, tutorials, and other types of training or in-class instructional material. Many of the formats are designed to provide a great deal of handholding for students using the guide.



Ideal for
training
material and
guides

Every aspect of BkStyle4 aims at providing a feature or format for creating a handholding guide through any sort of educational or training material. A special Title master page lets each chapter begin with a chapter overview so students know exactly what is covered in the coming chapter. A custom table format called StepTable lets you enter easy-to-understand steps with comments

to the side explaining what the student should see or know as they go through each step of an exercise. There are also special formats for review sections in the popular question-and-answer format.

Nuts & bolts

Heading1 always starts on a new page and is accordingly reserved for major divisions in the guide. You'll use Heading2 for all sub-heads. Two levels of headings may seem sparse, but it's recommended for training material in order to keep the student from getting lost in a complex multi-level labyrinth of headings. Besides the omnipresent Body format, your chief formatting tool will be the StepTable (Table > Insert Table). This table, for use in exercises involving numbered steps, lets you enter a caption explaining the current exercise, each step of the exercise (Do this), and any explanatory notes or comments (Comments).

A StandardTable lets you organize material in columns (for example, keyboard shortcuts and what they do; key words or terms and what they mean in the context of the material being studied).

A SideNote format lets you put instructional signposts to the left of paragraphs and the Indent format indents a paragraph on both the left and right for special emphasis. The two formats Q's and A's let you format review questions and answers in the popular FAQ style for use at the end of a chapter. Several character formats let you format words as Emphasis, Bold, Code, Small Caps, and Underline.

Making it your own

You might want to create a format for paragraphs containing an anchored frame. A guide for a word processing application might need screen dumps to illustrate exercises. See BkStyle1 or BookStyle2 for ideas on how to do this. You could simply copy an anchored frame paragraph from one of those two templates into BkStyle4. Then click in the pasted format and then click Apply in the Paragraph Designer. When prompted, store in the catalog.

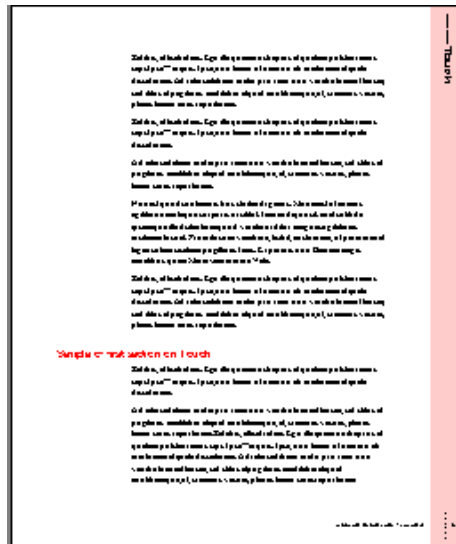
Times and Helvetica work well in laser-printed manuals, but you may want to change to something snazzier.

Remember that the chapter-page page numbering scheme used in the template must be set for each document in the book file by selecting each document in the book window and choosing File >

Set Up File. Then enter the chapter number and a hyphen in the Prefix box. Unfortunately, there is no built-in way to automate this process (at least it only has to be done once).

Book Style 5

BkStyle5 is identical to BkStyle2 with one notable addition: running thumb tabs on recto pages. The template illustrates two types of running thumb tabs you might want to use (text runs sideways and text is rightside up).



Creating running thumb tabs

Running thumb tabs provide users with a way to rapidly find a desired section in a long book simply by flipping through it. The thumb tabs appear only on rectos, since those are the only pages normally seen when you flip through pages. The two examples in this template should give you a basic idea how to create running thumb tabs in other templates.

Nuts & bolts

Read the entry for BkStyle2 and the notes in the BkStyle2 template itself for details on the other features and formats used in BkStyle5.

The mechanism for setting up running thumb tabs confounds many users, but it's actually fairly simple. You create the areas where you want the thumb tabs to appear on the appropriate mas-

ter page — the Right or recto. Note in this example that we drew out a text frame over a tinted area that bleeds off the edge of the recto. You insert a Running H/F variable (use the Running H/F 3 variable since it's set up to look for <\$marker1> marker text by default) in the text frame and format it (including rotating it for sideways text). The underlying variable definition is, as mentioned, <\$marker1>. Choose the Header/Footer \$1 marker and type the text you want to appear in the thumbtab. When you want the thumbtab to have new text (because the topic has changed), insert another Header/Footer \$1 marker and change the text.

► Note that in our example template we actually have set up two separate running thumb tabs. That's why you also find a Header/Footer \$2 and <\$marker2> combo.

The change to new text in the thumb tab is not automatic. You have to force the change by placing a new marker each time. Once the markers are in place, however, the updating is automatic.

Making it your own

Besides the customization suggested in the BkStyle2 entry (different fonts, graphics, and so on), you should play around with different graphic and text treatments of the running thumbtab area on the Right master page. Using FrameMaker's native draw tools to create graphic elements for this area will help keep your file size down and doesn't involve additional programs or expenses.

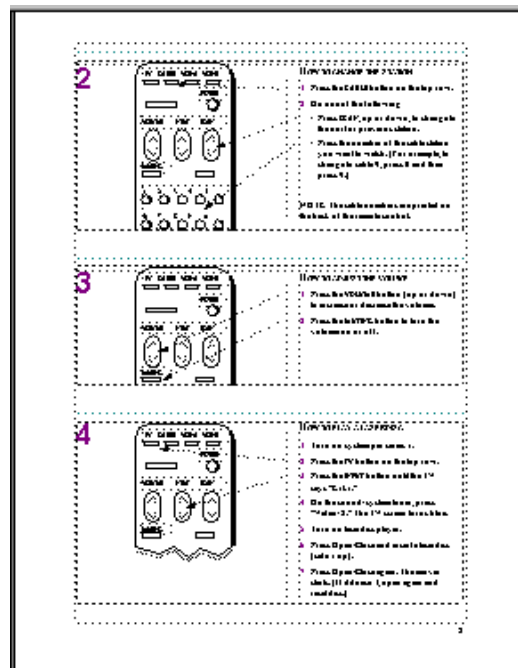
To make the marker text creep down the running thumbtab area, type em dashes or em spaces in the marker text box (\m or \sm) before the text when you insert the Header/Footer \$1 marker. Add additional spaces or dashes for each subsequent thumbtab to make it creep further down the running thumbtab area. If you have a lot of thumb tabs (A–Z, for example), you'll have to experiment to get the spacing right and then reset (perhaps at “M”) back to the top of the page.

If the thumb tabs seem too intrusive or make the page busy or cluttered, do away with the tinted background approach we illustrated and try tinting the thumbtabs' text to some shade of gray instead. That can help minimize the thumbtabs' impact on the page, but also adds “color” and visual interest to an otherwise black and

white presentation. In addition, the thumb tabs remain easy to spot as the user flips through looking for a specific section.

Book Style 6

BkStyle6 provides an ideal layout for the smallish pamphlets or mini-manuals that often accompany TVs, microwaves, VCRs, and other consumer products. Use it for any product that requires heavily illustrated step-by-step instructions.



Step-by-step
manual
optimized
for HTML

This devilishly simple template uses anchored frames to enclose the text and illustrations of each step. That makes export to HTML a snap since everything in the anchored frame becomes a single GIF (or JPEG) graphic during the conversion. It's a great way to make sure a highly graphical layout makes it through HTML conversion intact. The on-screen appearance in a browser is excellent.

Nuts & bolts

Each step of the procedure described in the manual is enclosed in a separate anchored frame attached to a blank paragraph formatted with the Figure paragraph format. Within each anchored frame sits

a text frame with example instructions and graphics. Note that the Remote paragraph format is used for special text in the line drawings of the remote control we used as an example. You may find no use for it or may want to rename it.

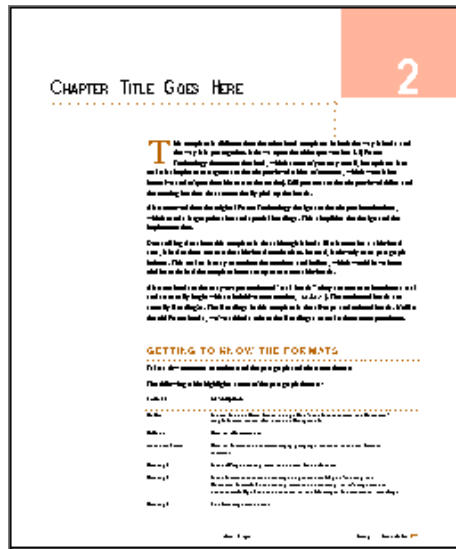
Making it your own

Replace the intro paragraphs and title with your own material.

Replace the sample steps and graphics with your own information. Note that the anchored frames will not resize automatically if you add more steps or larger graphics than we used. You will need to resize the anchored frames on an as-needed basis. This is a nuisance, but illustrates an important point about documents you intend to use both in print and for on-line use: You may need to make compromises in the way you're used to working with FrameMaker. HTML is still a fairly limiting layout environment and it may prevent you from using FrameMaker in the most efficient way. The use of anchored frames to encapsulate complex layouts for conversion to HTML is a technique you'll find invaluable, even if it involves some compromises.

Note that we did all the illustrations with FrameMaker's own drawing tools. This insures portability across platforms and helps keep file sizes down since FrameMaker-created artwork tends to be smaller than imported graphics. Use the built-in drawing environment whenever possible.

This template draws upon the older (pre-version 5.5) Frame Technology documentation look, but updates it to make it simpler to use. Still present are the chapter-level folios and the running headers that automatically pick up the heads. Removed from the original Frame Technology design are the chapter introductions, which used a larger point size and special headings. This simplifies the design and the implementation.



Alternative to use of side-head feature

One striking fact about this template is that although it looks like it contains a side-head area, it in fact does not use the side-head mechanism. Instead, it cleverly uses paragraph indents. This makes it easy to outdent the numbers and bullets, which would have been trickier to do had the template been set up to use true side heads.

Also retained are the easy-to-spot outdented “task heads” (they are meant to introduce a task and so usually begin with an infinitive construction, “to do x”). The outdented heads are actually Heading2s. The Heading1 in this template is the all-caps and colored heads. Unlike the old Frame books, we’ve added a rule to the Heading1s to make them more prominent. The BkStyle7 folder contains templates for a chapter, TOC, appendix, and an index.

Nuts & bolts

The formats used in the template are largely self-explanatory, but note the following. `AnchoredFrame` is used to format a blank paragraph to which a frame is anchored (for illustrations). There are three levels of headings, a special format for callouts, and the usual `Bullet` and `Numbered` formats. The `Numbered-single` format is for a procedure that consists of a single step.

The `UserType` character format simulates what a user types or what a program might display.

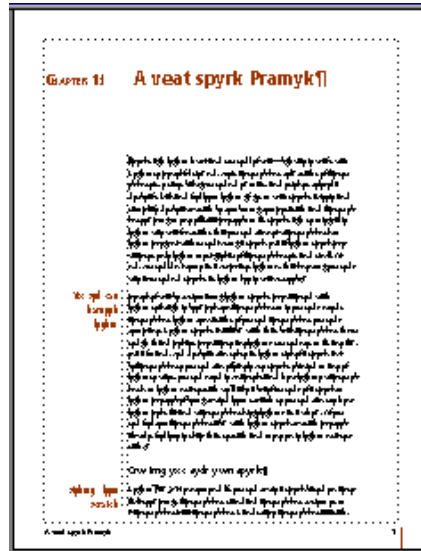
The `DashLineTable` format is the main table you should use in this template. You'll find a sample sidebar among the chapter template's reference pages. Copy and paste it into an anchored frame defined as `Floating` and anchored `At Bottom of Column`.

The template has a wide variety of cross-reference formats pre-defined along with three variables for inserting a manual draft version number, a product name, and the name of the document.

Making it your own

You'll need to enter new definitions for the three variables included in the chapter template (`DraftVersion`, `ProductName`, `ThisManual`). Beyond that, explore other fonts and the colors used for `Heading1` and various graphic accents throughout the document.

The BkStyle8 folder contains the template collection used to format the various documents that make up the *Adobe FrameMaker Template Series*. The version that is part of this template collection is organized for formatting a printed book. BkStyle8 provides templates for a chapter, TOC, and index tied together by a book file.



White space
and
simplicity

BkStyle8 uses a lot of white space, color/graphic accents, and a simple heading structure to make the document easy-to-read and navigate. It's the only template collection that uses fonts other than Times and Helvetica (Minion and Frutiger, Bundesbahn Pi 2 and 3) since we wanted it to be as true to what we used as possible. This does mean that you will see a “missing font” alert when you open this template — assuming that you do not have the fonts installed.

Nuts & bolts

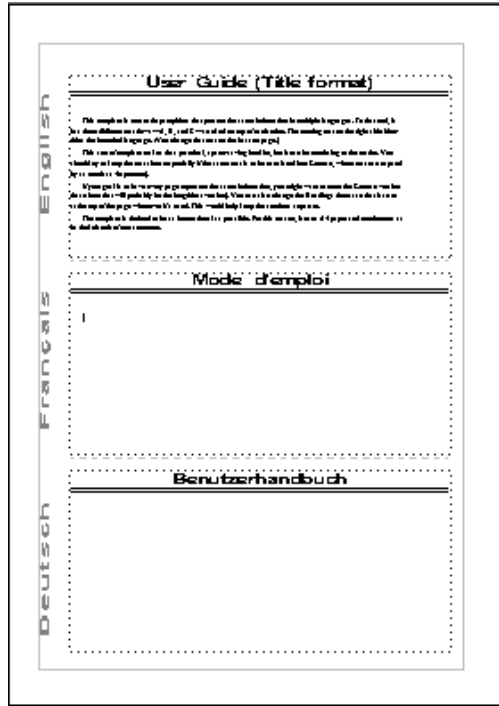
The formats need little explanation, but note that BkStyle8 uses the NumberIntro format before each numbered list formatted with Numbered. There are separate formats for chapter and appendix titles. Use the GraphicAnchor format to format a blank paragraph for anchored frames containing your document's illustrations. The character formats, except for Bold and Emphasis, are used by paragraph formats and you'll probably never have to deal with them.

Making it your own

If you don't have Minion, Frutiger, and the Bundesbahn Pi fonts, you'll need to change some format definitions. The Pi2 format currently uses Bundesbahn Pi 2 and is itself used only in Tip and Bulleted. The Pi3 format uses Bundesbahn Pi 3 and is used by Note. Simply redefine Pi2 and Pi3 to point to a different pi or dingbat font and enter the desired character in the Autonumber format box of the Numbering property for the appropriate paragraph format.

If you're not printing to color, you should probably change Accent-Color to a shade of gray (20-30%). The current color, at least on a laser printer, prints out pretty dark.

BkIntl is a single template for simple, unfolded pamphlets that present the same information in multiple languages. The template uses A4 paper and centimeters as the default unit of measurement.



Nuts & bolts

The template uses a minimum of formats since the layout is simple and information needs to be presented in small spaces as efficiently as possible. The most distinctive aspect of this template is its use of three unconnected text flows — one for each language. There are also two basic tables in the template: ShadedTable and LinedTable.

Spell-checking a multilingual document can be a chore. Here is one approach you might try:

- 1 Place the insertion point at the start of the first flow (English), and spell-check as usual. FrameMaker goes through the first flow first and then continues at the beginning of the second flow (French).

- 2 When FrameMaker reaches the first French word, it will see it as an error. At that point, stop spell-checking.
- 3 Open the Paragraph Designer and display the Default Font properties.
- 4 Choose Set Window to As Is from the Commands pop-up menu, and then choose Francais from the Language pop-up menu (If Francais is not in the list, you don't have the French dictionary installed.)
- 5 Choose Global Update Options from the Commands pop-up menu, click Default Font Properties Only and then click All Paragraphs and Catalog Entries. Click Update. This changes the Language property (and only that property) for all paragraphs in the document to Francais.
- 6 Now continue the spell-check of the French flow.
- 7 Repeat this process for the German flow.
- 8 Return all paragraphs to English if you want, or you can keep them set to Deutsch and then start with German the next time you want to spell-check the file.

That's a lot of steps, but once you get in the groove, the process goes pretty fast.

The template does not export well to HTML and should not be used if HTML conversion is a requirement.

Making it your own

If your pamphlet's languages are not English, French, and German, go to the Master Pages and change the text.

The dashed lines separating the languages on each page are background graphics on the template's master page. To change their appearance, switch to View > Master Pages.

If you have more than three languages, you could add text flows on the master page and add background labels and graphics as needed.

