Adobe® FrameMaker®
Template Series
Primer

Gregory Wasson
David Valiulis

Primer and template guide design by Bobbi Long.

Getting Started

The following few pages contain important information on how to handle the downloaded files so you can use them with FrameMaker on your computer.

Requirements

To use these templates, you should have the following:

◆ FrameMaker or FrameMaker+SGML

All the templates work equally in either FrameMaker product. If you're using FrameMaker+SGML, you can use these templates for unstructured documents; none of the templates provide element definitions.

◆ Version 5.5 or later

If you only have an earlier version of FrameMaker and still want to use one of the templates, ask a friend to save the template in MIF and then open and resave the file in the earlier version. (Any 5.5-specific formatting will be lost in the conversion.)

Installation

The most convenient place to install the template files is in the folder that contains the standard FrameMaker templates. By placing them in this location, they will be available whenever you create a new document by choosing File > New. If you prefer to place them in a different folder, you may have to navigate to that folder to find them when you create a new document.

Windows

The six template groups are compressed in .exe format.

To install the template files in Windows:

1 Copy any or all of the .exe files (tempac1.exe, tempac2.exe, and so on) to the Templates folder, which is in the folder you installed FrameMaker in. The default location is:

\Program Files\Adobe\FrameMaker5.5\Templates

2 After downloading an .exe file in Windows, double-click on the .exe file to access the file's contents.

3 Delete the .exe files once all the files have been uncompressed.

Macintosh

The six template groups are coded as BinHex files (.hqx) and compressed in StuffIt format (.sit format).

To install the template files on the Macintosh:

1 Copy any or all of the .hqx files (tempac1.sit.hqx, tempac2.sit.hqx, and so on) to the Templates folder, which is in the folder in which you installed FrameMaker.

2 Drag the .hqx files onto StuffIt Expander to uncompress the .hqx files.

StuffIt Expander is a free utility from Aladdin Systems (408-761-6200). For more information about StuffIt Expander, see http://www.aladdinsys.com.

3 Delete the .hqx and .sit files once all the files have been uncompressed.

UNIX

The template files in each group are collected in .tar format and then compressed into a .Z file.

To install the template files in UNIX:

1 Copy any or all of the tmpltar files (tmpl1.tar.Z, tmpl2.tar.Z, and so on) to the following directory:

$FMHOME/fminit/<language>/Templates

where <language> is the language version of FrameMaker you're using (such as usenglish or ukenglish).

2   Extract the contents of this tmpl.tar file by entering the following command:

uncompress -c tmpl1.tar.Z|tar xvf -

(If you're extracting a different file—tmpl2.tar.Z, tmpl3.tar.Z, etc.—be sure to substitute that name in this command.)

3   Delete the tmpl.tar file by entering this command:

rm tmpl1.tar.Z

(If you're deleting a different file—tmpl2.tar.Z, tmpl3.tar.Z, etc.—be sure to substitute that name in this command.)

That's it. Now when you choose File > Open, you'll have the additional template directories available in the New dialog box.

Most of the templates contain sample text and instructions. These instructions are helpful when you're using the templates for the first time. After a while, however, you'll probably want to clear out the sample text from the templates you use regularly. If you do this, be sure to keep a copy of the filled-in template in case you need to be reminded of how it's supposed to look or work.

Typographical conventions

The Adobe Acrobat PDF documents that make up this primer and the instructions for each template package make use of a number of typographical conventions you should be aware of:

➤   This format indicates an important note or warning.

◊   This format indicates a tip or technique that can make you more productive.

Text formatted like this, The Adobe Web site, indicates a Web link you can click in the PDF document to open your default browser to that site.

Each template instruction file (a separate PDF file) lists and describes the templates in that package, giving each template's full name with the filename or folder name (if several templates make up the document) in parentheses; for example:

Press Release (Press.fm)

is the heading for the Press Release template entry (Press.fm is the name of the template file). Similarly,

Dissertation (Thesis)

is the heading for the dissertation template entry (Thesis is the folder name).

In a few cases you might see an entry such as this,

Legal (Collect.fm, Complain.fm, Plead.fm, Will.fm)

This indicates the heading for the legal templates entry (Legal is the name of the subfolder which contains the files Collect.fm, Complain.fm, Plead.fm, and Will.fm).
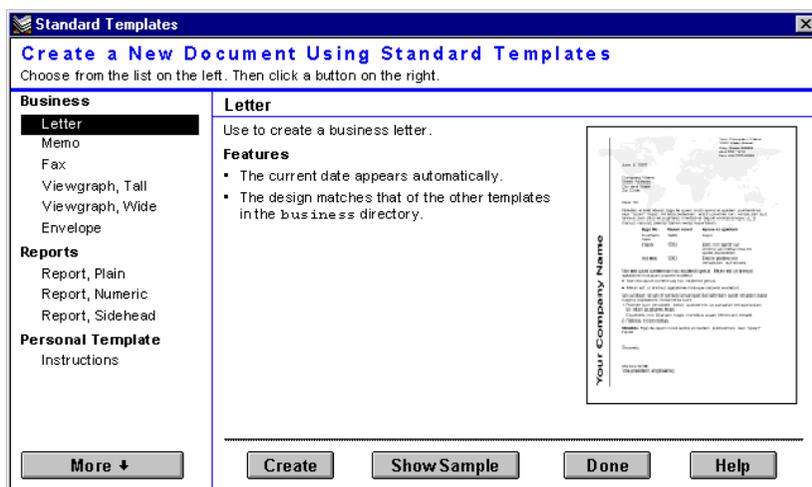
Introduction

Template.

The origin of the word itself hints suggestively at templates and their value for whatever field in which they're used. In ancient Rome, augurs traced out a rectangular open area of the sky—a *templum*—within whose confines alone could valid signs and meaning be sought. In Homeric Greece, a *temenos* (derived from the word *temno*, which means to cut, cut out, mark off) was a space set off as special or sacred to a ruler or god, within which only specified people, actions, and rites were deemed appropriate or permitted.

In keeping with these distant linguistic roots, templates generate almost a kind of religious fanaticism or devotion among Framers. Like the Roman *templum* or Homeric *temenos*, a FrameMaker template involves formats, ritualistic forms as it were, that force the writer to follow a certain structure or approved set of rules in order to create a finished, valid document of significance. Why are templates so important to this program and its users when the templates shipped with other programs generally remain untouched, tucked away in forgotten directories, or deleted from hard disks altogether? Most early FrameMaker adopters, already devotees of UNIX arcana, produced highly technical, complex material that required a highly structured presentation to be effective and comprehensible. In addition, most of these documents were extremely long—500 pages or more. The writer didn't have the leisure to check and format every page (often the case with smaller documents and traditional DTP programs), but had to be able to entrust formatting to the program itself. FrameMaker handles that chore admirably with templates. It brings order to the unwieldy chaos.

The love affair between Framers and templates that developed naturally in this environment has never lost its intensity even as the

program has become increasing popular among Windows and Macintosh users.

Over 150 templates

Standard Templates

Create a New Document Using Standard Templates
Choose from the list on the left. Then click a button on the right.

Business
- Letter
- Memo
- Fax
- Viewgraph, Tall
- Viewgraph, Wide
- Envelope

Reports
- Report, Plain
- Report, Numeric
- Report, Sidehead

Personal Template
- Instructions

Letter

Use to create a business letter.
Features
- The current date appears automatically.
- The design matches that of the other templates in the business directory.

[More ↓]   [Create]   [Show Sample]   [Done]   [Help]

About 20 templates grace FrameMaker. You can preview them from within the program.

Given the importance of templates to the FrameMaker way of working, we've always thought it strange that the software shipped with relatively few templates—just a handful compared to the dozens that accompany the leading word processors. And that feeling gave birth to this series.

The *Adobe FrameMaker Template Series* brings over 150 professionally designed templates to FrameMaker users. The templates range from technical manuals to cookbooks, personal letterhead, and even Web sites you can create entirely in FrameMaker. We've also thrown in over 30 custom table formats; borders (created entirely with FrameMaker tools) you can use for certificates, menus, and invitations; and special features, such as guidelines (for layout work), pre-built fractions (handy for recipes), quickly customizable variables, and easy-to-use tables of contents that can be updated with just a click or two.

Why we chose the templates we did

FrameMaker traditionally finds itself at work in corporate or technological settings. Framers have tended to be part of publications departments producing highly technical material or manuals for their companies. We've included a wealth of templates and other material of interest to this important segment of the FrameMaker userbase. But there's no reason why the program should be limited to this niche. Accordingly, we've tried to include templates for a broader spectrum of users: pubsters, of course, but also marketing/PR writers, administrative assistants, home office workers, and even casual users. We've tried to make templates aimed at these less technical users less intimidating and more intuitive to use. In some instances, we've even intentionally avoided employing some of FrameMaker's more advanced features where a seasoned, savvy Framer would have used them automatically.

What's in the series

This series is not just another rehash of the documentation. It does not teach you how to use FrameMaker or go through a stale listing of every menu item. We've tried to put fresh food on the table. The *Adobe FrameMaker Template Series* will help you put FrameMaker to better use by helping you fully understand the power of templates, by supplying you with an abundant store of customizable templates, and by informing you of template-related resources you can tap. The series' organization closely reflects these intentions:

A FrameMakerTemplate Primer

This primer covers original template creation in FrameMaker, leading you step-by-step through the process with a checklist of things to do or consider as you create your template's structure and formats. We take a look at template dos and don'ts to keep you from making some common mistakes. We also pay special attention to optimizing templates for on-line use as HTML or PDF files on the World Wide Web or on intranets. The primer also examines in great detail how to customize templates, covering issues of typography and font use, graphics, and the use of variables.

A FrameMaker Template Collection

The template collection itself is available in six template packs downloadable from the Adobe Web site. A PDF file accompanying each pack describes each template briefly, provides a screen dump of a representative page, describes how the template works ("Nuts and bolts"), and finally suggests some specific ways you might want to use or customize the template ("Making it your own"). In the case of borders, tables, letters, and some other common document types, we cover all the variations in one entry rather than examining each template separately.

Because we could not reliably know which fonts users have installed on their computers, we reluctantly restricted ourselves to an excruciatingly basic set of Type 1 PostScript typefaces and their variants: Times, Helvetica, Courier, and Symbol. Again and again, we found ourselves at painful odds with this self-imposed embargo every time we caught a tantalizing glimpse of Galliard, Stempel Garamond, or even Zapf Dingbats (our kingdom for a non-round bullet!) in the Paragraph Designer. It wasn't fun. We encourage you to let your natural fontasy run free. The "FrameMaker Template Primer" includes some suggestions on suitable font substitutes.

FrameMaker as a Layout Program

This section describes in detail some of the innovative techniques we used to handle the sort of design-intensive doucments (newsletters, ads, etc.) that FrameMaker normally does not handle as well as DTP programs such as Adobe PageMaker. In short, this section tells you how to break all of FrameMaker's rules.

Essential Keyboard Shortcuts

This section lists and describes some keyboard shortcuts that template designers can use to increase their productivity.

Localizing Templates

This section outlines the simple steps you would take if you wanted to localize one of our templates (most are designed with U.S. paper sizes in mind) for another country or language.

FrameMaker Resources

The "FrameMaker Resources" section lists various other on-line and off-line sources of tools, templates, instruction, and other items of interest to Framers.

A "Getting Started" section following the Introduction tells you how to install any template packs you download. Separate instructions cover Macintosh, Windows, and UNIX installations. We've also peppered the lot with handy tips, undocumented features, and special techniques, all denoted with special icons, throughout the book. Be sure to read them. They'll teach you some things about conditional text, text strings, and other FrameMaker features you never knew. They include the techniques and workarounds we used again and again in our templates.

We hope the *Adobe FrameMaker Template Series* makes a positive difference in your work. FrameMaker users have long hungered for more pre-made templates and a greater variety of template types than come with the software itself. This template series will take the edge off that appetite.

Bon appetit!

Dave Valiulis wrote his first long document (a 300-page doctoral dissertation) on a cutting-edge electric typewriter (an IBM Selectric). Since then, he's been a library assistant, a science writer, a production manager, and most lately a technical writer for Adobe. He has been a primary writer on the FrameMaker documentation for the last several versions.

Gregory Wasson is a long-time contributing editor to the now defunct *MacUser* and one of the founding sysops of the ZiffNet/ Mac online service (now absorbed into Computing Pro on CompuServe). He's done online work for both CompuServe (now part of America Online) and America Online and was the Webmaster for NetCarta Corporation (before Microsoft gobbled it up). Perhaps events are trying to tell him something. He has produced software manuals and marketing material for a variety of clients, including Apple, Claris, Frame Technology, Live Picture, and others. His motto: *Template fugit!*

A FrameMaker Template Primer

Templates are the heart and soul of FrameMaker—brevity to FrameMaker's wit. These powerful stylesheets or collections of formats, page size, background elements, and master pages control a document's look and feel from the get-go. In FrameMaker, templates automate and simplify document creation by combining composition and formatting in one efficient process. In fact, templates are so integral to the way FrameMaker functions that you cannot work in the program without using a template, even if the template provides only the most generic of formats and structure. It shouldn't come as a surprise, then, that knowing your way around templates is the key to FrameMaker success.

You can harness the power of FrameMaker by customizing the templates provided with the software to better conform to your needs or the conventions of you or your company. The templates in this seriesor available through third parties provide another source. In fact, any file, even a finished document, can serve as the start of a template. But before you can effectively use templates obtained in any of these ways, you need to understand how they work. In the next section we'll take a brief tour of a template in the process of being created from scratch so you can see how the parts fit and work together as a whole. If you feel comfortable with the template creation process already, feel free to skip this section and move on to the next section, "Having it your way," on page 42.

Creating your own template

Starting from scratch

The File > New command lets you create a template based on default settings for standard or custom pages in Portrait or Landscape orientation or use one of the standard templates that ship with FrameMaker. For all your effort in the New dialog box, you

generally walk away with a bare-bones page with one column, a master page with a footer and header, and a collection of boiler-plate formats such as Body, Bullet, Numbered, Heading1, and so on. For most purposes, the default templates simply won't cut the mustard and you'll find yourself tailoring the template or better yet, simply striking out solo on that lone template trail. Starting from scratch really isn't the long march you might imagine. Designing a template does, indeed, take some careful planning, but it can also be enormously satisfying and fun as you successfully gather together the supplies needed for the journey to a finished document.

Page layout, columns, and master pages

Every journey begins with the first step and to start a template from scratch means choosing New from the File menu. Clicking Custom in the New dialog box displays the Custom Blank Paper dialog box where you define the first elements of any template: page size, num-

ber of columns, margins, whether the document is single- or double-sided, and the units of measurement—in other words, the basics. You can change any of these elements later, but it's a lot easier to do it right now, so give this dialog box more than just a cursory once over. Give it careful thought and build the template on a firm foundation.

### Creating a consistent look and feel with master pages

Once you sign off on the initial New dialog box, the nascent template appears, squealing and kicking, fresh with a single text flow and a basic set of paragraph and character formats, but not quite equipped for its adult responsibilities. First stop in the education of any template: master pages.
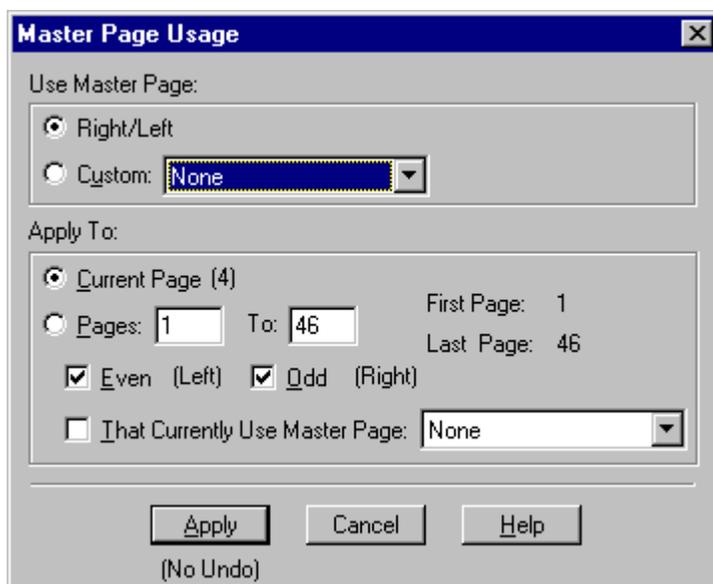
Every template has at least one master page. This page contains all the items you want to appear on every page based on the master page: footers, headers, background text or graphics. In most page layout or desktop publishing (DTP) programs, master pages are a traditional way to maintain a consistent look and feel across pages without manually mucking around on each and every page to make sure page numbers fall in the same location or that graphic elements are properly aligned. In FrameMaker, you access the master page area by choosing View > Master pages. You scroll through the pages, if more than one exists.

Some templates may have more than one master page. For example, a template for chapters in a book or manual may have three master pages: first, right, and left. The first master page might have a special layout and graphics for the title page at the start of a chapter. Right and left master pages would incorporate the look and elements you want to appear on the rectos and versos that make up the rest of the chapter. You might have other master pages (as many as a hundred) for other special-purpose sections of a document, such as fold-out or rotated pages.
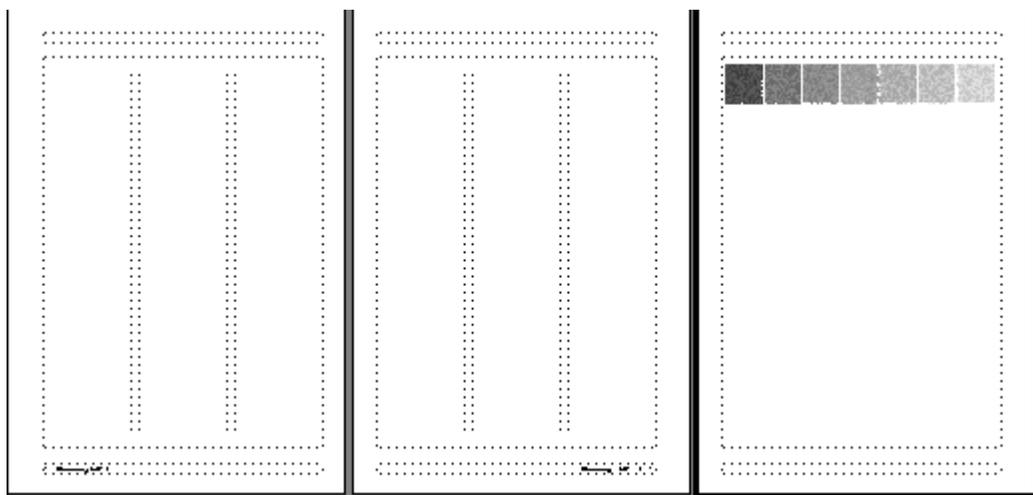
A newly created, custom template will have at most two master pages, depending on whether the document is single- or double-sided. One text flow named "A" graces the master page(s). Each automatically generated master page will also have a header and a footer. You can change any of this (remove the header or footer, change its location, resize the text flow). We'll talk more about that later. You can add background text to a master page, but text placed or typed in a master page text flow will not appear on body pages when you switch back to normal viewing via View > Body Pages. Headers and footers buck that limitation. You can enter text, system or user-defined variables (such as page number or count, date, or running headers/footers), and graphics in the header/footer text frames. Anything placed there will appear in Body pages view.

Controlling text with paragraph and character formats

The use of text on master pages brings us to the issue of controlling how text looks (its font, point size, color, etc.) throughout a document. Just as master pages control the general page layout, paragraph and character formats control how text looks at the paragraph level or even letter by letter. FrameMaker's Paragraph and Character catalogs correspond to the stylesheets found in some word processors or DTP application software. Creating the individual formats of these catalogs is the next step in transforming a fledgling template into a powerful, independent tool.

◊ FrameMaker provides two paragraph formats for creating numbered steps: Numbered1 and Numbered. Numbered1 starts numbering at 1 (the autonumber format is defined as: <n=1>.\t) and then hands off to the Numbered format for the rest of the steps. Unfortunately, if you need to add a step before it, you can't just place the insertion point at the beginning of step one and press Return. If you do, you end up with two step ones. A better way to handle numbered steps is to adopt the convention that the paragraph before the numbered steps always resets the numbered step autonumber series. Rename Body to "NumberedIntro" and save it to the catalog as a separate format when prompted. Enter the following as the autonumber format: S:< =0> where S is the label for your steps autonumber format. Another option is to let Body itself reset the autonumbering series.

Each template comes with a set of basic formats for paragraphs and characters, ranging from text for body material, heads, bulleted or numbered lists, and table cells to character formats to make single words within a paragraph bold or italic. Why not just apply font, size, and style selections from a menu? Because formats make quick, painless changes on a document-wide scale possible. You have to reformat text formatted on the fly paragraph by paragraph, word by word. Text controlled by FrameMaker formats, on the other hand, changes instantly throughout a file if you change the corresponding formats.

Formats are forged, blow by blow, within two mighty dialog boxes:

♦ The Paragraph Designer (Format > Paragraphs > Designer)

♦ The Character Designer (Format > Characters > Designer)

The Paragraph Designer is a dialog box with a series of tabbed sheets where you have total control over a paragraph's look. FrameMaker lets you muck around with the basics, such as font, point size, and alignment, but the true test of its mettle comes in the details: pair kerning, autonumbering, default text strings, stretching text (FrameMaker 5.5 or later only), hyphenation and word spacing, widow/orphan control, space above/below, leading, change bars, and next paragraph links. While designing a template, you'll spend so much time in the Designer, that the keyboard short-cut to display it will become a personal mantra: Control+M (Windows), Command+M (Macintosh), Esc o p d (UNIX). Some Framers find it more efficient to dispense with the keystroke alto-gether and simply leave the Paragraph Designer open all the time. If you have enough available screen real estate, it makes sense to let Paragraph Designer and other frequently used non-modal dialog boxes move in.
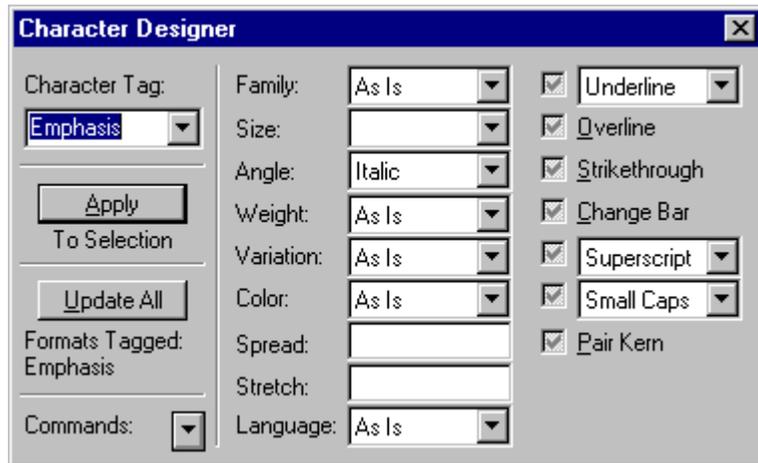
The Character Designer in FrameMaker.

The Character Designer basically serves as a way to selectively override the type-related aspects of a paragraph format, including font, point size, weight, and so on. Instead of formatting an entire paragraph, character formats let you format single words, phrases, or even just characters. Like paragraph formats, character formats let you quickly change the look of text by simply changing the definition of the character format itself. Any words or characters controlled by that format instantly change to reflect the new definition. For example, you might need to emphasize a word in a paragraph occasionally. You create a character format called Emphasis that makes selected text bold. Later you decide italics makes more sense as a way to draw attention to emphasized words. Instead of searching for all bold words in a document, you can simply change the definition of the Emphasis character format from bold to italics and presto! Previously bold words bow humbly.

◊ The Numbering property of a paragraph format creates autonumber schemes, such as numbered steps. You can also use it to insert default text at the beginning of a paragraph, such as "Note:" or "Warning" by entering the text in the Numbering property area of the Paragraph Designer. You can use this ability to prompt a typist for specific information in a form letter or invoice. For example, the Customer format might insert the label "Customer" and then seemingly pause for the typist to enter a name and press Return. Customer might link to Street which automatically inserts the label "Street" and then waits for the typist to enter the street address. It's an easy way to automate data entry in certain kinds of business documents and thus make an employee more productive. The template invoice.fm makes use of this technique, as do many others.

Paragraph and character formats in FrameMaker, when thoughtfully designed and not merely cranked out with indifference, can do more than just distinguish an otherwise dull document with a distinctive look and feel. Properly equipped, a paragraph format can insert default text automatically, or pass the controlling torch onto another format (from Heading1 to Body, for example) when it has run its course (and you've pressed Return), thus saving you or the user of your template time and keystrokes.

Setting up reference pages

Not content with mere body and master pages, FrameMaker relies on another page type called the reference page (View > Reference Pages). A template can have as many as 100 reference pages. Together they form a kind of document warehouse stocked to the ceiling with boilerplate graphics, lines (rules), entries that control HTML output, heading levels, formatting for generated files, and special macros or mappings. When a document needs a special item that is stored in the reference pages, such as a single horizontal line to place below a heading, the document can simply grab it off the shelves, so to speak.

Reference pages offer several advantages. They help keep FrameMaker documents smaller by storing frequently used material, such as graphics or boilerplate text in one place. This lets you display, for example, a special graphic icon or rule above or below a paragraph several times in a document without copying the graphic multiple times into the file, inflating its size with each additional instance. The graphic exists only once—on the reference page in a named frame. Reference pages also help maintain consistency in graphic placement throughout a document, since reference page graphics retain the alignment, spacing, and other attributes of their frames when brought into a body page. Even the most generic template has, at a minimum, about six reference pages, one with predefined lines (for use above or below paragraphs) and several pages of special mappings that control HTML conversions. We'll get back to some reference page chicanery you can profit from later.

Aren't we special!

FrameMaker teems with a variety of special text items ideal for working in long documents, documents destined for online use, or dynamic documents. They even reside in their own menu with the

highly appropriate name Special. You'll find some of them indispensable as you create your own templates or customize the ones in this series.

Cross references send readers off to related passages.

◊ You usually use cross-references and Special > Cross-Reference to direct readers to another location in a document, but a writer can also exploit them as navigation tools while working within a long document to jump to distant passages or sections in a flash. Simply open the Cross-Reference dialog box with Special > Cross-Reference. Select a paragraph tag, such as Heading1 or Heading2, that denotes a major section in your document. A list of paragraphs formatted with the chosen tag appears. Highlight one and click the Go to Source button to warp off to that section of the document through your cross-reference *wormhole*. Using cross-references this way wasn't the intention of the Great Framer; but, as the Klingons say, "Hoch nuH yIqel!" Consider every weapon!
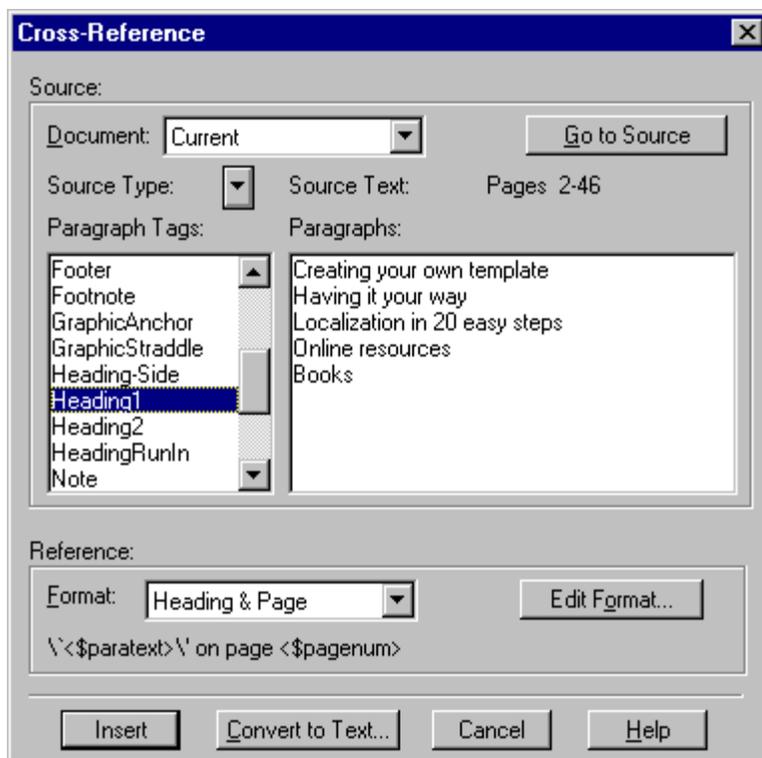

The Cross-Reference dialog box can help you naviagte around a long document.

Variables serve as placeholders, displaying their definition. Change the definition, and what the variable displays changes instantly, no matter how many times you've inserted the variable in your template or document. Special system variables store handy bits of

information such as the time and date, page number, number of pages, filename, and other data. Other variables, such as those for running headers or footers, steal their definitions from headings or other paragraphs, displaying that text wherever you've placed running headers or footers.

◊ User-defined variables tend to be a single word: a role in a play, a product name that may change as documentation is prepared—in short, a single line or less. In fact, the definition cannot exceed 255 characters. But you can create multi-line variables by typing \r in the definition wherever you want to insert a line break. This technique is handy for storing an address that might change frequently or any other information that might take up several lines.
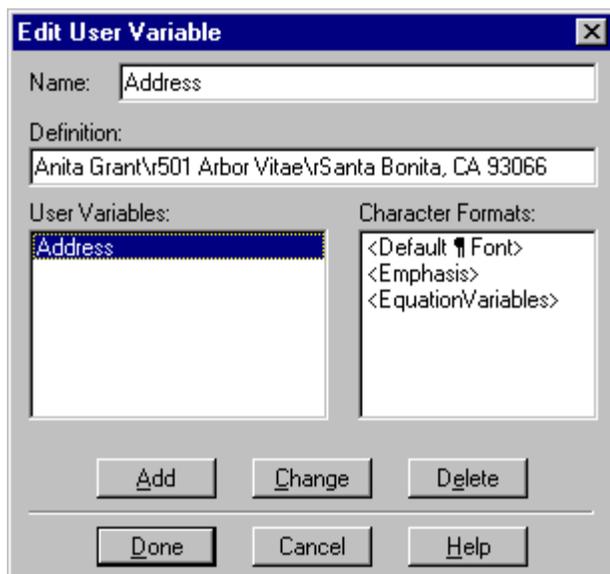
Creating a variable with multiple lines.

Other special text items you'll probably use at some point are index markers, footnotes, conditional text (text sections of a document that can be turned on or off), hypertext markers for creating jumps within a FrameMaker document or to prepare a document for use as PDF or HTML. You can read a lot more about online documents and FrameMaker's features for creating them in "Optimizing a template for online use as HTML," on page 22.

Templates for generated files

Templates for generated files such as TOCs or indexes are also special, unique creatures unto themselves. Here's a case in

FrameMaker, moreover, where you generally start with a file and create the template for it afterwards, placing the cart before the horse, as it were. Most often, you open a document and generate its TOC or index. You then open the generated files and turn them into a template by creating master pages, formats, and other elements; and save them under the default name for a TOC or index. For example, if the main file is book.fm, the TOC will be automatically named bookTOC.fm and the index will be bookIX.fm. You must retain these names for your templates or any subsequent TOC or index generated from the main file, as updates to previous generated files will not reflect your carefully designed formatting and page layout. The default for generated files is the underlying page layout of the source document with all TOC and index entries appearing the same.

◊ Documented, but seldom remembered, is the technique you use to generate pagination such as 2-3 (Chapter 2, page 3) in a table of contents or index. You can fiddle with a paragraph's Numbering property until you scream, but the answer lies elsewhere in a mysterious place called the book file. To accomplish this sort of numbering, all files must be part of a book file. Open the book file and choose File > Set Up File. The Set Up File dialog box appears. Enter 1- (or whatever chapter number is appropriate) in the prefix area. Do this for each document in the book file.
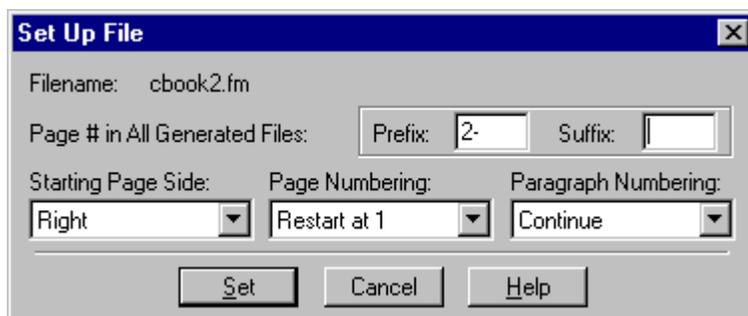
You can enter prefixes to page numbers (such as 1-, 2-, etc.) in the Set Up File dialog box for book files.

Some aspects of formatting generated files, however, are anything but straightforward and require some explanation. Each generated file has a special text flow located on a reference page with placeholders representing the actual text that appears on the body pages. It's here and not on the main body page, however, where you do most of your formatting. The entries are tagged with paragraph formats, with names derived from the paragraph formats the entries had in the source document. For example, a Heading1 entry

adopts a Heading1TOC tag in a TOC. You must change these generated formats to reflect the way you want the TOC or index to look. To insert tabs (between a TOC entry and its page number), you do this on the appropriate reference page, placing the tab between the default placeholders as shown in the illustration.

<$paratext>¶

<$paratext> <$pagenum>¶

§
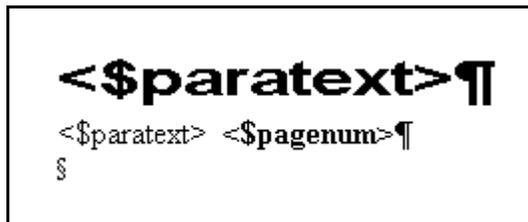
It can be a complex process, but is fully explained in the FrameMaker *User Guide.* We're providing only the most basic overview so you can understand the role of generated files in the template creation process.

▶ Some Framers prefer to create a template for the generated file before the file is generated, thus placing the template horse sensibly back in front of the generated file cart. To do this, simply create a blank document based on the template for your main file (this helps keep footers, headers, page numbers, and so on consistent and aligned properly). Give the template file the same name that FrameMaker would automatically create when generating a TOC or index, as already explained. Likewise, design formats with the names FrameMaker would auto-generate: Heading1TOC, Heading2TOC, and so on. Place this template in the same directory as the source file. When you generate the TOC or index, FrameMaker will use your template.

Optimizing a template for online use as HTML

FrameMaker (version 5.1 or later) has climbed aboard the Internet bandwagon by incorporating a number of features designed to turn it into a Web and PDF publishing powerhouse—or at least nudge it along in that direction. There's always room for improvement, but starting with version 5.1 (with a special plug-in available at the Adobe Web site), FrameMaker makes single sourcing for print, HTML, and PDF output more and more practical. Here are some guidelines that should help you avoid mistakes and make the most of FrameMaker as a cybertool as you develop your own templates

or customize existing ones for online use. This section assumes you are using at least FrameMaker 5.5.

➤ FrameMaker tables translate over to standard HTML tables, but there are some limitations and caveats. Cell color, cell border widths, rotated text, and table size do not carry over, but perish in the translation process. The documentation tells you that you can control whether the table has borders or not. But it doesn't make it clear that you must specify the table's borders in the Table Designer. Any setting you make with Table > Custom Ruling & Shading (even to turn borders on or totally off) FrameMaker ignores during the conversion to HTML.

Spinning a Web with FrameMaker's HTML capabilities can be fun, challenging, frustrating, and exhilarating all at once. On the plus side, you can produce attractive HTML pages and incorporate them in an existing Web site without extensive knowledge of HTML and without leaving the familiar WYSIWYG environment of FrameMaker—at least if you stick to relatively basic, no-nonsense page layouts. On the negative side, FrameMaker's HTML capabilities seem largely aimed at producing plain, corporate-oriented pages totally lacking in the multimedia pizazz and wired design of many Web sites. In other words, we're talking technical manuals, press releases, product data sheets, company directories, and white papers where one text flow, a body format, and perhaps a couple of heading levels suffice. Sideheads, runaround graphics, and other advanced design elements just don't fly. FrameMaker, in short, is not Adobe PageMill. That said, this book has the audacity to include two templates for creating full-fledged, if rather simple Web sites: one for personal use, the other for creating a corporate presence on the Web. It can be done. If you do want your FrameMaker document to appear on the Web exactly as it appears within FrameMaker, Adobe's PDF format is a practical alternative we'll discuss later. It requires that visitors to your site install a free browser plug-in, but you may find the results merit this inconvenience.

◆ You might expect FrameMaker to append the .htm or .html extension automatically when you save a file as HTML. Oops! It doesn't. You can bypass this sign of sloth by appending it yourself in the Save dialog box. Once you do, FrameMaker, shamed to the task, will add the extension to any other HTML files generated.

When you save a FrameMaker document as HTML, the program saves everything in the main text flow, text and anchored frames, to

the generated HTML file(s). Text or graphics from the master pages disappear. FrameMaker uses settings on the HTML reference pages (View > Reference Pages) to determine which HTML tags correspond to the paragraph formats you used in your FrameMaker document and formats the HTML page accordingly. You can set the mapping before the conversion by choosing File > Utilities > HTML Setup (see following illustration). If you don't do it, FrameMaker will, and you may not be happy with the results.
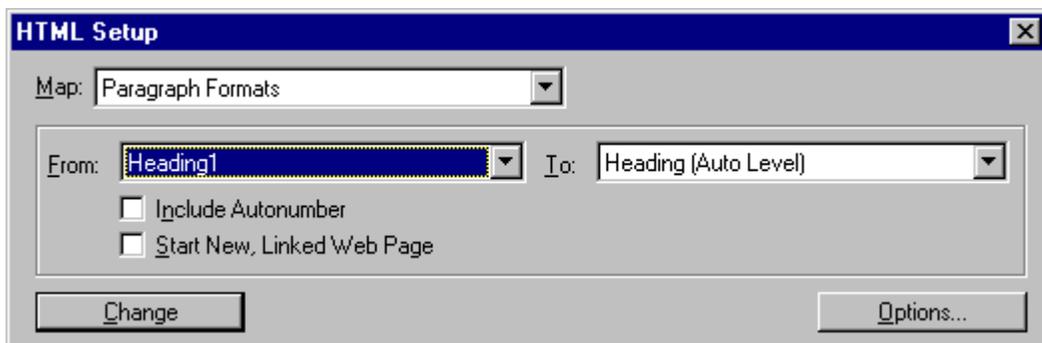
Normally, the entire FrameMaker file gets pumped into one HTML file (and hence one scrolling page), but you can designate any heading in the source file to force FrameMaker to generate a separate HTML file/page whenever it encounters that heading. The first HTML file contains links to the secondary pages. The result is a fairly pedestrian, but useful series of linked HTML pages or even a complete Web site. We've used a sneaky variation of this technique in the Personal Web Site Template that awards you with much more flexibility in designing an attractive home page. Check out that

template and the Corporate Web Site for some ideas and examples of how to get the most out of FrameMaker's HTML prowess.

Table 1: FrameMaker to HTML Reminders

	Remember	Comments
1	Avoid format overrides	Overrides are the Devil's snares; a professional shouldn't be using them. Create new formats or expect a sloppy conversion to HTML that can't be blamed on the software.
2	Avoid complex page design	HTML was never intended for complex page layouts and can't handle side heads, complicated hanging indents, drop caps, and irregular runaround graphics. Keep documents intended for online use simple and elegant.
3	Use File > Utilities > HTML Setup to map formats to HTML tags	FrameMaker's default mapping is seldom 100% on the mark. Always do this step manually or be prepared for some amusing and confusing HTML formatting faux pas.
4	Set table borders in Table Designer, not with the Table > Custom Ruling & Shading command	Borders are an all-or-nothing affair in the great FrameMaker to HTML chase. Custom settings are ignored.
5	Map special characters to HTML substitutions on the HTML reference pages (Character macros table).	Smart quotes, copyright symbols, angle brackets, em dashes, and more are simply not in the parlance of HTML. Instead of dumbing down your source document, map these typographical niceties to straight quotes, (c), double hyphens, and so on. Some are already mapped for you.
6	Open all documents in a book file before converting	Error messages can disrupt the conversion process.
7	Resolve all cross-references before converting	Broken links await the disobedient.
8	Make sure Copy Files Imported by Reference is enabled in File > Utilities > HTML Setup	Broken graphic links will mar the HTML page without this setting.
9	Tag the .html or .htm extension on to the file name when you save to HTML	There's just no Web connection without that three- or four-letter extension!

◊ FrameMaker provides a palette imbued with all the colors that nature and Pantone provide. Unfortunately, only 216 of them work across platforms on all browsers. Browsers dither other colors and the results aren't always very pretty. You can avoid the problem by restricting yourself to the 216 Web-safe browser colors. FrameMaker 5.5.3 and later have a built-in Web safe color palette called Online that version 5.5 lacked.

Finally, the HTML reference pages (see following illustration). We've mentioned them once before as a source of settings FrameMaker relies on to parse a document into HTML. They also store snippets of HTML code the documentation calls HTML macros. For example, you can create horizontal rules in FrameMaker by placing lines in anchored frames. They become GIFs during the conversion. But you can minimize your page's graphic load by defining a "macro" with a single line of HTML code to draw a horizontal rule and then inserting a marker (Special > Marker) on the body page that calls this macro. Unlike the GIF line, the macro-created line will expand as needed to fit the browser window. The FrameMaker *User Guide* contains full details on how to do this.
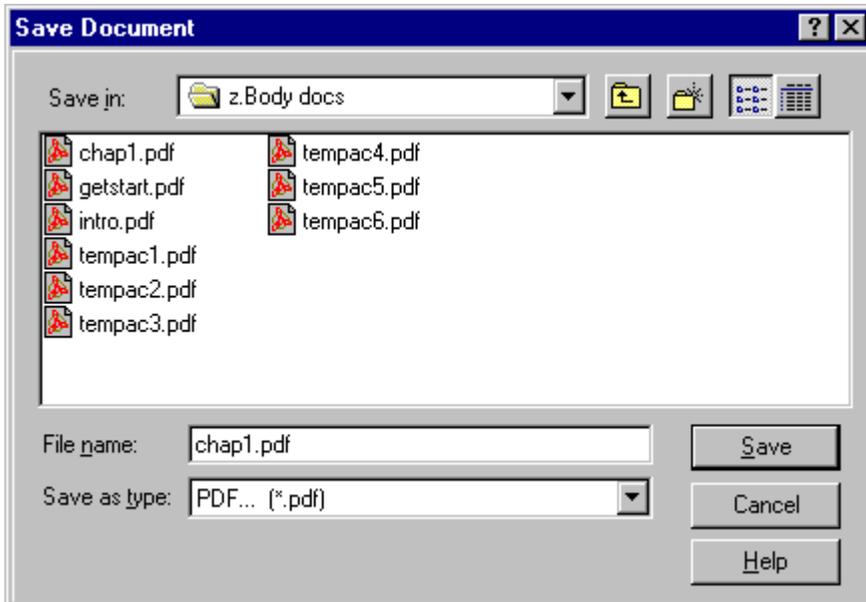
System Macros

Macro Name	Replace With	Head	Comments
StartOfLastSubDoc		\<TITLE\> \<$defaulttitle\> \</TITLE\>	
EndOfLastSubDoc			

Cross-Reference Macros

Macro Name	Replace With	Comments
See Also	See \<$paratext\>	

◊ FrameMaker doesn't let you print reference pages, but here's a workaround in case you need hard copy of the HTML reference pages for reference. Open a blank new document. Choose File > Import > File, select the file with the reference pages you want to print, and click Import by Copy or Import by Reference. The Import dialog box appears and lets you elect to import the Reference Page Flow. Choose HTML from the popup menu and click the Import button to flow the HTML reference pages onto the body pages of the new document. Now you can print the pages without so much as a murmur from FrameMaker.

PDF PDQ!

Save Document	? ×

Save in: 📁 z.Body docs ▾ 📁 📁 ▦ ▦

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📄 getstart.pdf 📄 tempac5.pdf
📄 intro.pdf   📄 tempac6.pdf
📄 tempac1.pdf
📄 tempac2.pdf
📄 tempac3.pdf

File name: chap1.pdf   Save

Save as type: PDF... (*.pdf) ▾   Cancel

                                        Help

▶ This section, as did the previous one, assumes you use at least FrameMaker 5.5. If you aren't using the most recent release, you will not be able to take advantage of the product's growing Internet capabilities.

The Adobe PDF format offers far more flexibility in presenting your documents online than does HTML—and it's far easier dealing with PDF than with the various HTML variables you have to consider when saving out to HTML. Starting with version 5.5, Adobe Acrobat technology is increasingly integrated within FrameMaker. In fact, if you installed the Acrobat software when you installed FrameMaker (it's an option during the FrameMaker installation), you simply choose File >Save As and select PDF from the dialog box popup to save the current document as a PDF Acrobat file. FrameMaker generates some PostScript, launches Acrobat Distiller, and feeds Distiller the PostScript. A few moments later, out comes a spanking fresh PDF version of your document. The process takes place transparently. You might not even notice it's happening. No alerts pop up, no progress indicators fill. It's almost a no-brainer.

Although the procedure soars along on autopilot, you can exert some control over the process before it starts and you can take some steps to prep your document for optimal use online.
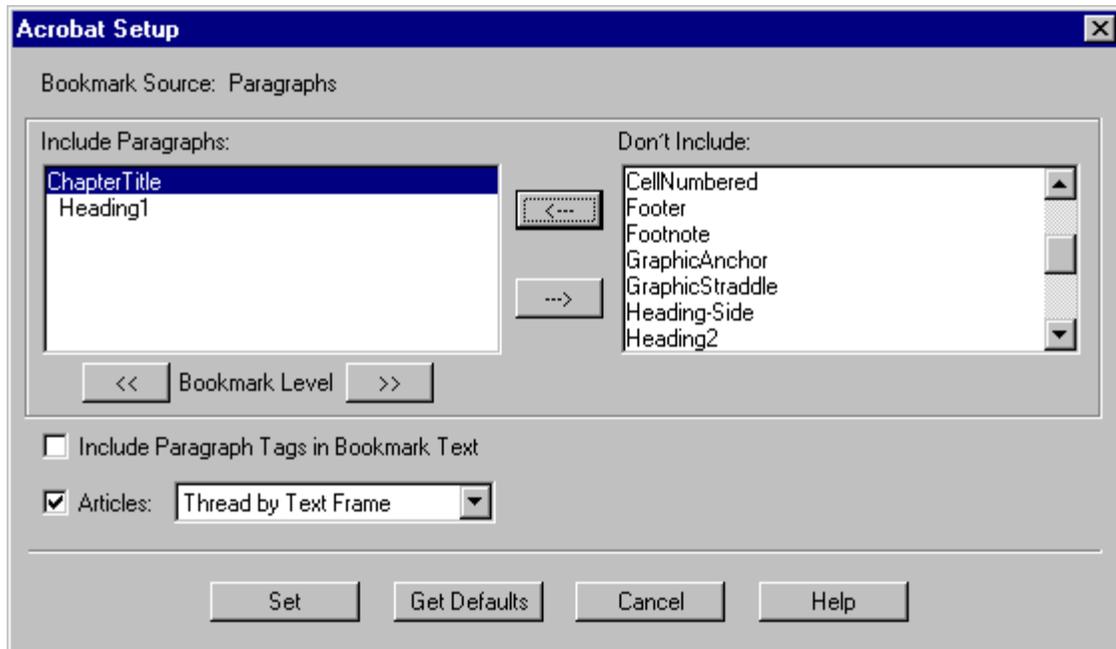
Just after you click the Save button to generate the PDF file, the Acrobat Setup dialog box (see illustration above) offers you control over which paragraph tags will be used to create Acrobat bookmarks (for navigation within the Acrobat PDF file) and how to thread articles: by text frame (single column documents) or by column (the best choice for multicolumn layouts). The default choices for the tag/bookmark mapping are seldom satisfactory, so make sure you pay attention to this dialog box or you'll regret it later.

After the file is converted to PDF, any cross-references or hyperlinks in the file become links in the PDF version. You can also explicitly set up URLs in the FrameMaker document. They transform into active Web links in the PDF file that open in your default browser when clicked. Take the time to enhance any document destined for online use with online features. FrameMaker makes it easy to turn any text or graphic into an active URL link. You simply select the text or draw out a text box on top of an area of a graphic in an anchored frame and set a hypertext URL message command (Special > Hypertext). It's easier than entering HTML code.
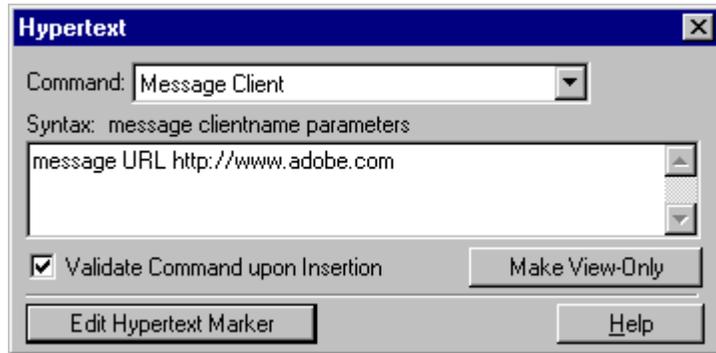
The Hypertext dialog box lets you enter links to URLs in FrameMaker documents.

You might consider using conditional text to include additional online material or variants of existing paragraphs edited for online use in a document also used in print form. A simple flick of a conditional text switch could flip you between the online and print forms of the same file, thus controlling the content of the HTML or PDF versions of the same FrameMaker source document.

◊ Problems converting a file to PDF? *Cherchez la* printer driver. Faulty, out-of-date, inferior printer drivers are the most common culprits in PDF file conversion mishaps. ALWAYS install an Adobe printer driver (included on the FrameMaker install disc) for the best results.

In addition to single documents, you can convert multiple linked files or book files. All links remain intact after the conversion process. Refer to the FrameMaker *User Guide* for details.

The downside to all this, of course, is that end-users have to configure their browsers and install a free plug-in or the Acrobat Reader in order to benefit fully from PDF. Some people would rather eat ground glass than do so. Therein lies the rub.

◊ When you save as PDF or HTML, you may notice a puzzling phenomenon—when you open the PDF file or view the HTML page in a browser, everything might seem smaller than it did in FrameMaker. What causes this? Alien probes? Occult interference? A shadowy and nefarious conspiracy? Nope, but the truth is out there, and you can find it by choosing File > Preferences. The Monitor Size setting (present in the Windows version only) in the Preferences dialog box (see illustration following this tip) lets you control how FrameMaker displays your document based on your monitor size. Why is this important? In Windows, monitors come in many physical sizes and can have many resolutions (dots per inch), which has the effect of defining a logical size. Given all the possibilities, should FrameMaker display a document so that, at 100% zoom, it is displayed at the same size as it will print, or should it display a document based on the current resolution? If the former, 1 inch on the FrameMaker ruler will be the same as 1 inch on paper. If the

latter, 1 inch on the FrameMaker ruler may not match a real inch at all (if, for example, you've upped the dpi of your monitor to squeeze more info on a screen). Most Windows users don't notice that their onscreen ruler doesn't match a real-world ruler in their applications (hold a ruler up to the screen in Word, for example), but FrameMaker takes WYSIWYG more literally than most applications. FrameMaker lets you resolve this issue by offering a Monitor Size setting that recalibrates what 100% zoom looks like to compensate for your physical and logical monitor size. You can choose Default to let FrameMaker work as other Windows applications, or you can enter an explicit monitor size to recalibrate (you may or may not have to enter your actual monitor dimension, depending on the current dpi setting of your monitor). You can enter monitor sizes from 0.05" to an amazing 455".
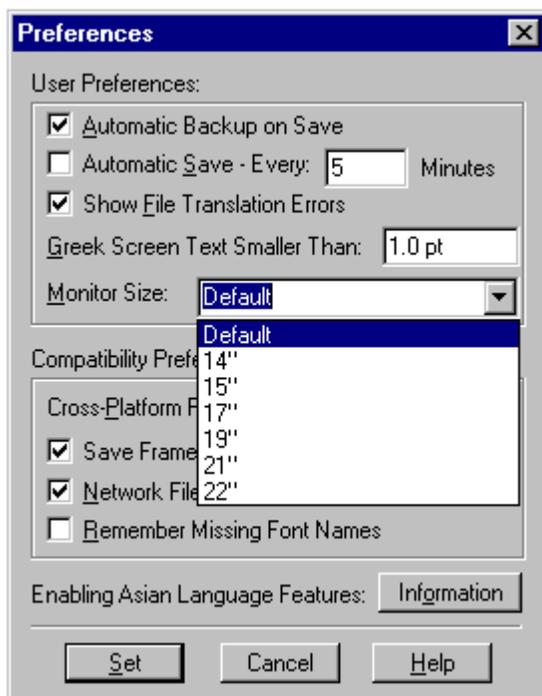
The Monitor Size setting in the Preferences dialog box (Windows only) affects the apparent size of your pages on the screen.

Designing sensibly

Designing for online use is part of a more general issue that needs to be kept in mind as you bring your template up from its infancy to maturity: designing appropriately for the template's intended users. Don't use inappropriate features for the users of your template. Neither an administrative assistant nor marketing staff need a template based on the complexities of a FrameMaker book file. KISS, if the user's needs warrant it.

◆ Framers usually keep TOCs as separate files, including them with a project's other documents in a book file. That can be overkill on a grand scale if the base project is a simple pamphlet or booklet best handled in a single document. In this sort of smaller document, generate and format the TOC as usual (see "Templates for generated files," on page 20 and the FrameMaker *User Guide*), but don't create a book file to combine it with the source document. Instead, create a page for the TOC in the source document and choose File > Import > File to copy the generated TOC into the page by reference as a text inset. Then if the source document changes, generate the TOC again, double-click the TOC text inset in the source document, and click the Update button.

In general, don't let the template get away from you. *Template fugit.* It's easy to become so distracted by the creation of elaborate formats, autonumbering schemes, and other FrameMaker arcana that you lose sight of the goal: good, elegant design that makes information a breeze to enter, interesting to look at, and easy to understand.

The following few pages contain an extensive checklist you might want to go through each time you design a template. The table outlines the things to do when creating a template, roughly in the order in which they should be done. Such a checklist is not definitive—many of these steps have no correct order, but all of them should be considered at some point or another during the creation process. That's the important thing.

Table 2: What to do when creating a template (sheet 1 of 11)

	Task	Comment	How to
1	Open a standard template that's similar to your goal, and save it under a new name.	This will save you a lot time defining formats. Think about what the name should be: BookTemplate.fm, Generic.fm, StartHere.fm, etc.	Open one of the formats from this series of template packs, or use the formats that come with FrameMaker. Choose File > Save As.
2	Decide if you want to enter values in inches, points, centimeters, etc.	Values will be more understandable to you if you use a unit of measurement you're familiar with.	Choose View > Options > Display Units.
3	If want to use color, decide on a color model and define the colors you'll be using.	Color can be expensive to print. Consider defining grays or a range of tints from one color. If you're writing for the Web, use the Online color library provided in version 5.5.1 and later.	Choose View > Color > Definitions.

Table 2: What to do when creating a template (sheet 2 of 11)

	Task	Comment	How to
Decide on page layout...			
4	Set up page size (trim size) and double-sided-ness.	Not needed if the original already is the size you need.	Choose Format > Page Layout > Page Size.
5	Decide on overall page layout (margins, side-head area, number of columns, etc.)	If you're unsure, look at some examples or ask for advice.	Choose Format > Page Layout > Column Layout.
6	Decide on special master pages that might be needed.	Do you need a special master page for the first page of the chapter, or for a landscape table? Avoid too many custom master pages because they are hard to maintain later on.	1. Choose View > Master Pages. 2. Choose Special > Add Master Page.
7	Set up master pages with all the needed background text frames.	Text or objects in these frames will appear on each page that uses that master page.	Choose View > Master Pages and then use the Text Frame tool to add background frames.
8	Turn on Smart Quotes and Smart Spaces.	Both are recommended in most templates.	Choose Format > Document > Text Options.
9	Will the document use footnotes?	You may need a special format for footnotes. (And be sure to set the maximum height of a footnote to something large to prevent footnotes from falling onto the next page.)	Click in body text (not in a table) and then choose Format > Document > Footnote Properties.
10	Examine catalogs for formats you can remove, then delete them.	The fewer formats the easier your template will be to use. The standard FrameMaker templates continue to ship with a character format called EquationVariables—you can get rid of this one for sure.	Click the Delete button at the bottom of the catalogs. Click Delete as often as needed, and then click Done.
11	Decide on your overall font families and point sizes. Decide which font will be used the most (usually the body font).	Font decisions dictate many decisions later. Font sizes affect tab stop positions.	Consult a designer if needed. In a workgroup, you may be restricted to a standard set of fonts.

Table 2: What to do when creating a template (sheet 3 of 11)

	Task	Comment	How to
Create character formats...			
12	Apply the font family (and other universal font settings such as Pair Kern) to *all* character formats.	This will save you having to set these options over and over later.	1. Open Character Designer. 2. Choose Set Window to As Is from the Commands pop-up menu. 3. Choose the font family you want (and other universally needed properties). 4. Choose Global Update Options from the Commands pop-up menu. 5. Click Characters and Catalog Entries and click Update.
13	Add formats as needed.	Do you need an underlined format? a small caps format? You probably *will* need a format for bulleted or numbered lists.	Choose Set Window to As Is from the designer's Commands pop-up menu. Type a name in the designer's Tag text box, click Apply, and then click Create.
14	Go though the character formats, one by one, checking that the properties are As Is except for the ones you want to be applied.	Most of the properties in most character formats should be set to As Is.	Control-click (Mac: Command-click) a format name in the catalog to "stuff" it into the Designer, edit properties, and then click Update All.
Create paragraph formats...			
15	Rename formats to group them as needed and to optimize them for use with other, related templates.	For example, consider starting all table-cell formats with *Tbl* and all headings with *Head*. If your workgroup uses a set of related templates, keep the naming conventions the same.	Click in text formatted in the format you want to rename, change the name in the Paragraph Designer's Tag text box, and click Update All.

	Task	Comment	How to
16	Apply the body font (and other universal font setting such as Pair Kern) to *all* paragraph formats.	This will save you having to set these options over and over later.	1. Open Paragraph Designer and display Default Font properties. 2. Choose Set Window to As Is from the Commands pop-up menu. 3. Choose the font you want (and other universally needed properties). 4. Choose Global Update Options from the Commands pop-up menu. 5. Click Default Font Properties Only and then click All Paragraph and Catalog Entries. 6. Click Update.
17	Go though the paragraph formats, one by one, applying and checking font properties.	Headings are often in a different size and font than body formats, and sometimes in a different color.	Control-click (Mac: Command-click) a format name in the paragraph catalog to "stuff" it into the Designer, edit properties, and then click Update All.
18	Check the Language property of each format.	A language such as US English will do for most, but formats you don't want spell-checked or hyphenated (such as Code) should be set to None.	Choose None from the Language pop-up menu in the Designer and then click Update All.
19	Check the Keep With property of each format.	Headings should be kept with Next. Bullets should be kept with Previous.	Click Next ¶ or Previous ¶ in the Keep With area of the Pagination properties. Click Update All.
20	Adjust spacing between paragraphs.	This can be tricky; should you use Space Above or Space Below? Headings should have a large space above and a little or no space below. Use a consistent amount of space below (or above) in all body formats.	Enter values in the Space Above and Space Below text boxes and then click Update All.

	Task	Comment	How to
21	Adjust indents and tab stops.	Check the indents of bulleted and numbered lists. If they use tabs, the Left indent should match the first tab stop. Most formats don't need many tab stops, but some may need a lot (such as Code).	In the Basic properties, enter values in the First and Left text boxes, and create tabs as needed. Click Update All.
22	Decide on your autonumbering strategy.	Do you need a Numbered1 format? How many numbered series will you have? (Tables, lists, and headings?)	Implement series counters in the Autonumber Format text box. Be sure to specify a character format for numbered lists and bulleted lists.
23	Decide on the Next ¶ Tag format.	Leave this blank if you want the same format to repeat when users press Return. Headings usually automatically go to Body or the like.	Select a format from the Next ¶ Tag text box and then click Update All.
24	Do you need ruling lines with headings?	If so, you need to name and draw them on the reference page *before* creating the format.	In the Advanced properties of the paragraph Designer, choose from the Frame Above ¶ pop-up menu or the Frame Below ¶ pop-up menu. Then click Update All.
25	Do you want hyphenation globally on or off?	Casual works seldom hyphenate nowadays; more formal works do. You can also turn it on or off for specific formats.	1. Open Paragraph Designer and display Advanced properties. 2. Choose Set Window to As Is from the Commands pop-up menu. 3. Set hyphenation as wanted. 4. Choose Global Update Options from the Commands pop-up menu. 5. Click Advanced Properties Only and then click All Paragraph and Catalog Entries. 6. Click Update.

Table 2: What to do when creating a template (sheet 6 of 11)

	Task	Comment	How to
Set up headers and footers...			
26	Define the headers and footers on the master pages.	Will they pick up the text of the current chapter or heading? Will they be different on a recto and a verso?	1. Insert the Running H/F 1 variable or the Running H/F 2 variable on a master page background text frame. 2. Double-click it and redefine to use the text of the format(s) you want. 3. Format the text and variable.
27	Will page numbers pick up chapter numbers?	Some industries prefer the 2-3, 2-4, 2-5 type of page numbers, but such numbering can make indexes cluttered and hard to read.	Use a Running H/F variable in conjunction with the Current Page # variable.
Decide on graphics issues...			
28	Will you need a standard size graphic frame?	If so, create it and store it on the reference page so users can copy it.	1. Use Special > Anchored Frame to create a frame. 2. Cut the frame to the Clipboard. 3. Go to the reference page and drag out a text frame there and paste the anchored frame.
29	Do you need a paragraph format just for anchored frames?	It's more convenient to anchor a frame to the end of a body paragraph, but you have more control over spacing if you create a special paragraph format just for anchoring.	
30	Do you need a standard piece of artwork?	For example, a small "tip" icon is more convenient when placed on the reference page of the template rather than having to import it. But don't overdo it; graphics added to templates add to file size.	Copy the graphic and paste it on the reference page.

Table 2: What to do when creating a template (sheet 7 of 11)

	Task	Comment	How to
Create table formats...			
31	Remove Format A and Format B, if present, or give them more descriptive names.	Much better names might be 2col, 3col, PriceList, etc.	To delete a table format, open the Table Designer and choose Delete Format from the Commands pop-up menu. To rename a format, insert a table with the format you want to rename, change its name in the Table Tag text box, click Update All.
32	Set up the number of columns and rows.	This will be the default, but users can override this when they insert a table.	Insert a table and change it to the number of rows and columns you want. Then click Update All in the Table Designer.
33	Double-check that you have the paragraph formats you'll need.	You may want a special table cell format for table titles, headings, body cells, body cells with numbers, etc.	If you need to create some paragraph formats for tables, go back to Step 15.
34	Set up the paragraph formats you want used in the table.	Again, this will be the default, but users can override this when they insert a table.	Apply a format to the headers and body rows. Then click Update All in the Table Designer.
35	Set the basic properties for the table.	Will the table have a title? Will the title be autonumbered? Adjust margins, indents, and space above/below so that the table fits in with the look of the rest of the template design.	Set the Basic properties in the Table Designer and click Update All.
36	Will the table be allowed to break across pages?	Tables meant for fewer than 8 rows should probably not break.	To prevent breaking, set the Orphan Rows property to 255 in the Table Designer and click Update All.
37	Will the table use footnotes?	You may need a special format for table footnotes.	Click in any table and then choose Format > Document > Footnote Properties.

Table 2: What to do when creating a template (sheet 8 of 11)

	Task	Comment	How to
38	Set up regular ruling, if needed.	"Ruling" just means the lines used to separate rows or columns. You may need special types of lines defined (such as the white line used in this table).	1. Define a special rule if needed by choosing Table > Custom Ruling & Shading and then clicking Edit Ruling Style. 2. Set up the Ruling properties of the Table Designer and click Update All.
39	Set up regular shading, if needed.	You may need special colors for the table.	1. Define a special color if needed (see Step 3). 2. Set up the Shading properties of the Table Designer and click Update All.
40	Adjust any paragraph format that might be used in a table cell that no longer indents correctly.	For example, a Code format that starts with an indent will be too indented when placed in a cell.	Adjust the Table Cell properties in the paragraph Designer for that format.
41	Will you need a table format strictly for positioning purposes?	You could use an "invisible" table to simulate a 3-column bulleted list.	Assign no heading rows, no ruling, no shading, and no title. Assign body formats to the cells.
Create cross-reference formats...			
42	Remove formats you won't need.	The fewer formats, the easier they will be to use.	Choose Special > Cross-Reference, click Edit Format, and then click Delete.
43	Add formats you'll need.	Will you need to refer to chapter names (and numbers), table numbers, numbered steps, headings, etc.? Will the document use endnotes? (Endnotes are a special case of cross-references.)	Choose Special > Cross-Reference, click Edit Format, and then click Add. Refer to online Help for help with building blocks.
44	Are spaces and special characters working in the formats?	Entering special spaces and characters in a dialog box can be tricky. You'll want a non-breaking space to precede a page number; you'll want curved quote marks around references to headings.	See online Help for a list of codes you may have to use to enter special characters in a dialog box.

	Task	**Comment**	**How to**
Define user variables...			
45	Remove user variables you won't need.	You may not need any.	Choose Special > Variable, click Edit Definition, and click Delete.
46	Add user variables you will need.	You may want to insert a Draft# variable in a footer.	Choose Special > Variable, click Edit Definition, and click Add.
Set up conditional text...			
47	Add conditions you'll need.	Will you be creating multi-versioned manuals for different platforms or audiences (an OEM manual and an end-user one)? You may not need any conditions.	Choose Special > Conditional Text and click Edit Condition tag.
48	Adjust the condition indicators.	Use a color or effect that keeps the text readable both onscreen and when printed.	Choose Special > Conditional Text and click Edit Condition tag.
Set up HTML mappings...			
49	Optimize for use on the Web—if appropriate.	You may want to split up the file into several HTML files. You may need conversion macros for cross-reference formats.	Choose File > Utilities > HTML Setup. Choose View > Reference Pages and edit the tables on the HTML reference page.
Set up Acrobat settings...			
50	Optimize for conversion to PDF—if appropriate.	The defaults for bookmarks are usually way off.	1. Choose Format > Document > Acrobat Setup. 2. Shift-click the –> arrow and then add just the formats you want included as bookmarks.
Consider Japanese settings...			
51	Set up some special Japanese settings, if needed.	This applies to FrameMaker 5.5 only. These settings are best done by a native speaker working on a Japanese system.	Choose Format > Document > Rubi Properties. Choose Japanese in the Paragraph Designer. Consider the Tsume font property in the designers.

	Task	Comment	How to
52	Do you need to specify special Kumihan rules?	A corporate standard may dictate very precise typographical rules. This is for advanced users only.	To customize the Kumihan tables for the template, you export the template to MIF and edit the tables there. See the online manual *MIF Reference.*

Don't forget templates for generated files...

	Task	Comment	How to
53	Create a template for each generated file you might need.	These would include TOCs, indexes, and possibly tables of figures, and the like.	1. Create a book file from the template sample you create in Step 56. 2. Rename the book file to something generic. 3. Add the generated files. 4. Choose File > Generate/Update from the book file. 5. Use these generated files as the start of your templates for generated files.
54	Remove formats and objects that won't be needed in these files.	The generated files inherit lots of useless baggage from the sample file the book file was created from.	1. Remove any format that doesn't end with TOC, IX, or the like. 2. Remove all unused variable definitions, master pages, reference pages, conditions, table formats, and color definitions.

Document and test...

	Task	Comment	How to
55	Document how the template should be used.	Too many template creators fail to perform this vital step.	You can enter the explanation in the template itself.
56	Create a sample document trying to use every format and master page.	Try every combination of formats you can think of. If you find the need to apply a format override, you may need to create a new format.	Test, test, test.

Last steps and save...

	Task	Comment	How to
57	Set the template's View settings and its zoom and save.	Users won't usually need to see rulers, but borders and text symbols are usually helpful.	Choose View > Borders. Choose View > Text Symbols. Choose View > Rulers. Choose View > Grid Lines. Use the Zoom pop-up menu.

Table 2: What to do when creating a template

	Task	Comment	How to
58	Set up the template's Print dialog box settings.	You'll probably want to set the template to print with no crop marks, just 1 copy, and all pages.	Choose File > Print.
59	Set up color separations.	Specify colors you've defined in Step 39+ to print as spot colors.	Choose File > Print and then click Separations Setup.
60	Look for items you can remove to reduce file size and improve usability.	Be careful that users won't import unwanted items when they use File > Import > Formats.	Scan for unneeded formats, reference pages, master pages, table formats, color definitions, etc. Delete extra body pages too.
61	Celebrate!		

◊ Did you notice that Table 2 on page 31 has three independently numbered series? (The table title is numbered, every row in the lead-off cell is numbered, and in each row there can be a group of numbered steps.) To see how this nimble numbering was handled in a single "series," open the template that was used for this primer (it's the Bk8.fm book template) and check out the sample table there. Look at the Autonumbering Format for the TableTitle, CellBodyNum, and CellNumbered formats.

Having it your way

Taking an existing template, such as the ones accompanying this PDF file as separate downloads, and bending it to your will, is an art in itself. It requires craft and occasionally cunning. The following sections discuss some of the ways you can customize pre-made templates so they better serve you. And there's a final sidebar discussion on using FrameMaker for design-intensive documents such as newsletters in ways that will, without doubt, send seasoned Framers screaming from your side. Fasten your seatbelts.

Fonts—when Times and Helvetica just won't do

Changing the fonts used in a template is inevitably one of the first acts of template customization. One person's selection of perfect fonts presents a vision of typographic hell to another. Or, the change may simply be predicated by the conventions of corporate font use: your company's pubs or marketing department must use specific fonts in its printed material to preserve the corporate identity. Whatever the case, it's likely you'll want to abandon the Times/ Helvetica combo used in all of the templates included here. We used Times for body text and related formats, Helvetica for headings, tips, notes, TOCs, and so on. Chances are you'll want to stick to this kind of dichotomy (one serif font family for body-type text, a sans serif family for everything else), simply replacing Times and Helvetica with something more *au courant.*

FrameMaker makes global font updates like this quite painless. The strategy is to change all formats to font X (leaving all other properties As Is) and then, one by one, change specific formats to font Y:

1   Choose Format > Paragraphs > Designer and click the Default Font property.

2   Select the Body format.

3   Select a new font from the Family popup that you want body text and most other most text elements to have.

4   Choose Commands > Global Update Options. Make sure Default Font Property Only and All Paragraphs and Catalog Entries are selected.

5   Click the Update button.

Now go back to the Default Font property in the Paragraph Designer and, one by one, select the heading-type formats that should not be in the main font just defined above and change them to the desired font. The reason we take this approach to changing the fonts is that most text in many documents uses the same font family as the Body format. Changing all formats to this font and then changing the few headings and related formats to another font family will save a lot of time for most users.

➤ If the template you're customizing with font changes is part of a book, load the book file first. Select one of the book parts and make all the font changes as outlined above. Then use File > Import > Formats to import the Paragraph Formats from that file into the other files of the book. See the FrameMaker *User Guide* for details on how to do this.

The following chart shows some appropriate font substitutions for Times and Helvetica that, because of their characters per pica (cpp), will work in all the templates in this series without forcing you to fiddle much with changing indents, table cell sizes, and so on.

Table 3: Substituting for Times and Helvetica

Times (2.85 cpp at 10 pt.)	Helvetica (2.68 cpp at 10 pt.)
Many common serif font families can sub for Times in most documents, but several that match the high space-saving cpp property of Times include: ITC Berkeley Oldstyle, ITC Galliard, Adobe Garamond, and Minion	We find the following font families generally make suitable substitutes in our templates: ITC Eras, Eurostyle, Franklin Gothic, Frutiger (Light), Futura, Helvetica Inserat, News Gothic, ITC Novarese, Optima, and Univers

➤ If you still prefer to use some other font families, you might consider using the Spread and Stretch settings in the Paragraph Designer's Default Font property to create condensed or expanded versions of the desired fonts on the fly so they fit properly with a given template's layout and elements. This feature is available only with FrameMaker 5.5 or later. Simply decreasing a font's point size can also make it a candidate as a replacement for another font, so don't rule out that low-tech solution.

Importing and updating formats

Importing paragraph formats to update font use globally is only one aspect of customizing a template. Here are several scenarios you'll eventually encounter as you customize a template:

Table 4: Import and update scenarios

Scenario	Comments	How to
Import all formats	You want to change a document's formats to those found in another document or template.	Make sure both files are open, then choose File > Import > Formats. Select the formats and other elements you want imported, and click the Import button.
Import just one format[a]	You find a format in one document or template that you want to use in another.	Copy and paste the paragraph containing the format from one document into the other. Choose File > Utilities > Create and Apply Formats and click the Continue button.
Global updates	You need to change a format name or apply other changes to many files or formats at the same time.	Apply changes made in Paragraph Designer to several paragraphs or files at once by choosing Commands > Global Update Options in the designer dialog box.

a. If the format has a "frame before" or "frame after," you also need to include the frame on the reference page. If the format has a numbering format that includes a character format, you must also bring in that character format.

◊ Many may come away from their first experience with FrameMaker thinking that named text flows must have truncated labels such as A. You should keep labels short (there's only so much room in the status bar inn!), but you can use more descriptive tags such as Story1, Main, or Side, if you have more than one flow. Control-click the flow's text frame on the master page, choose Graphics > Object Properties, and enter a new Tag name.

Clip art and color

You can use clip art and color to spruce up even the drabbest document. FrameMaker includes a relatively large and wholly underappreciated or unnoticed treasury of clip art we used in several of our templates. Even electronics symbols, which many might consider useful only in that industry, became a rich source of elements we could use as graphic accents or geometric borders. The built-in clip art is as close as FrameMaker's Help menu and should be explored. Also use scanned artwork, company logos, and other corporate

symbols to make the template better reflect you or your company's identity. Many templates use FrameMaker clip art as placeholders waiting to be replaced by a company logo or personal piece of artwork.

➤ If the document is to be used online in HTML format, be sure that any graphics you want to appear in the online version are in anchored frames attached to the main text flow. Otherwise they will not be converted to GIF or JPEG files when you save to HTML. Background graphics placed on master pages, positioned unanchored in sideheads, or left floating on a page will all vamoose from the HTML output.

◊ If you define colors, name them to reflect their function (e.g., WarningColor), not their hue. This lets you change a color's definition later without also changing its name.

Most corporate print material, from press releases to manuals, tends to be monochrome. Put bluntly, black and white is cheaper. But it doesn't have to be boring. Most of the templates included in this book are likewise monochrome. Several of our templates (for example, Personal Web Site) make effective use of gray tones to add "color" to the page. And if color is not a financial issue, you can modify virtually any element in the templates (rules, page numbers, headings, etc.) by applying any color on your palette.

◊ One innovative use of color in FrameMaker lets you create non-printing guide lines (a feature common to design-oriented DTP software, but which we've sometimes missed in FrameMaker). Simply use a single color for all guides and other non-printing elements; see any of the Grid templates for examples. Choose View > Color > Views and include that color in View 1, but make it invisible in View 6. To see the guidelines, press Esc v 1. To make them invisible (and so non-printing), press Esc v 6.

As mentioned earlier, if the document may be used online in HTML format, you should, in most cases, restrict yourself to one of the 216 browser- or Web-safe colors. We've created a special color palette file you can install in FrameMaker. Windows users: Copy the file websafe.acf included with this PDF file to the fminit > color subdirectory inside the main FrameMaker directory on your hard disk. Macintosh users: Copy the file websafe.acf to the Color folder within the Modules folder. UNIX users: Copy the file websafe.acf to $FMHOME/fminit/color.

◊ FrameMaker doesn't restrict text to flows and frames. The underused Text Line tool offers a way to place single lines of text on a body or master page. You can stretch a text line. This lets you stretch a line of text to fit a defined area—a way cool Protean trick for creating logos and headline text art in some kinds of layouts. We used this technique a lot in the certificate templates.

The templates we created as part of this project are available as separate downloads, "template packs," at the Adobe Web site. A PDF template guide is available for each template pack as a separate download. Each entry in the PDF guide covers one template or family of templates, providing a screen shot, details on how the template works, distinguishing features, and some hints on how to customize and use the template effectively.

Check the "Getting Started" section near the front of this primer for details on installing the templates on your computer.

FrameMaker as a Layout Program
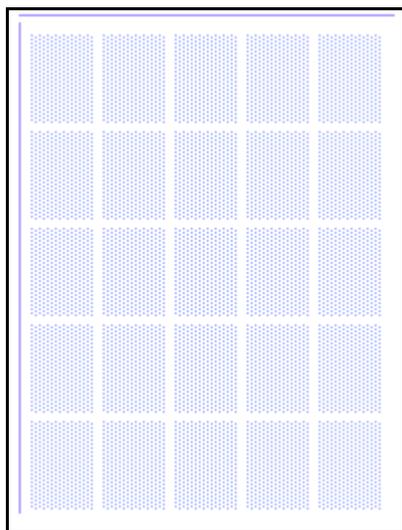
A layout grid in FrameMaker.

Turning FrameMaker on its head

FrameMaker excels at huge documents where most pages resemble each other in terms of structure. That doesn't mean it can't produce letters, memos, fax cover sheets, and all the other paper jetsam and flotsam of the work-a-day world—this template series attests to that.

FrameMaker can also handle some design-intensive documents such as newsletters, where each page's layout tends to differ from its siblings in the same document. FrameMaker comes with a newsletter template, but it assumes the usual FrameMaker *modus operandi* and expects each page to resemble the others. That's just not the way newsletters work and we wanted to try a more radical approach that turns FrameMaker on its head.

First, start with one of our Grid templates. The 5- and 7-column grid templates provide the most flexibility. Add the exact number of pages the final newsletter should have, make sure Snap is on, and save the file under a new name. Don't worry. We've set the template to preserve blank pages; they will not be automatically deleted when you save. Now you're ready to begin.

Use the Text Frame tool to draw out the frames or "columns" that will contain your first story. You can always resize them later if the story does not fit. Rely on the background grid to form the text frames into columns. You can place columns for the same story on different pages. Now go back and select the second frame. Choose Format > Customize Layout > Connect Text Frames. The first two frames become one text flow. Note how the insertion point disappears in the second frame (if you have View >Text Symbols turned on). Now Control-click the third frame and choose Format > Customize Layout > Connect Text Frames to add it to the text flow. Continue doing this until all the story's columns/frames are one flow. Control-click the first frame and choose Graphics > Object Properties. In the Customize Text Frame dialog box enter a name for the flow's Tag. Although these Tag names are usually one-letter affairs, you might want to give the flow a more descriptive name (keep it short), such as Story1, Story2, etc.
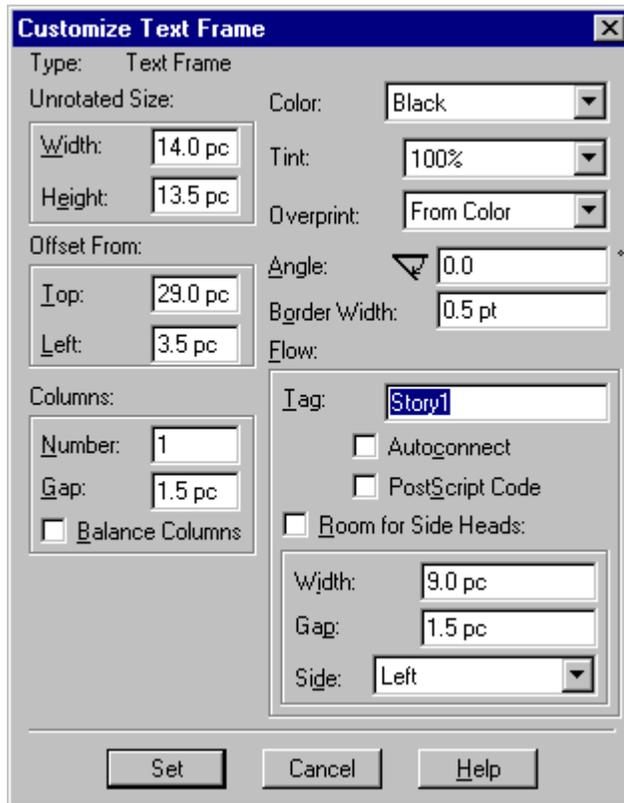
You can give meaningful tag names to stories in a newsletter.

Now type the story in the text flow or choose File > Import > File to copy the story in from an external word processing or FrameMaker document. Follow the same procedure for the rest of your stories.

You can create "continued on" jumps using cross-references. There are several approaches to this. The one we find works best in most cases is to insert a cross-ref marker near the end or middle of the text frame where the story resumes. Then insert a cross-reference at the end of the column: "Continued on page x." Create jumps only after you have finished all editing on the story or your cross-reference jump lines and cross-ref markers may move into the wrong columns as text is added or deleted.

◊ Whenever creating a template for a document with a set number of pages, such as a 4- or 8-page newsletter, add the number of pages, and then choose Format > Document > Numbering. In the

Add masthead material, graphics, rules, and other traditional newsletter material as background elements on the body pages where they belong.

It feels decidedly bizarre to work in FrameMaker like this, but we do find it a better approach to doing design intensive work in FrameMaker than the method adopted for the newsletter template supplied with the product.

Essential Keyboard Shortcuts

Template designers and creators will find that learning the following keyboard shortcuts will increase their productivity.

Some of the shortcuts use Escape shortcuts, which are unique to FrameMaker. Unlike other shortcuts, you must press Esc *and then release it* before pressing the keys that go with it. Once you get the hang of it, you'll really enjoy the power that these Esc shortcuts give because they work identically on all platforms.

Table 5: Shortcuts every template creator should know[a]

	Windows	Macintosh	UNIX
View Body Pages View Master Pages View Reference Pages	Esc v b Esc v m Esc v r	Command+Option+b Command+Option+m Command+Option+r	Esc v b Esc v m Esc v r
Paragraph Designer Character Designer Table Designer	Ctrl+m Ctrl+d Ctrl+t	Command+m Command+d Command+Option+t	Prop key or Esc o p d Esc o c d Esc t f
Open format in Designer	Ctrl-click name in Catalog	Command-click name in Catalog	Ctrl-click name in Catalog
Show/Hide Rulers Show/Hide Borders Show/Hide Text Symbols	Esc v r Esc v b Esc v t	Command+Option+u Command+Option+h Command+y	Esc v r Esc v b Esc v t
100% Zoom Zoom In Zoom Out	Esc z z Esc z i Esc z o	Esc z z Esc z i Esc z o	Esc z z Esc z i Esc z o

a. The Esc sequences will work on all three platforms.

Localizing Templates

The templates included here have an admitted North American bias. For example,

♦ Some of them use an 8.5-by-11-inch paper size.

♦ Their Language property is set to US English.

♦ Many of the dimensions are entered in inches.

This appendix outlines some of the steps you would take if you wanted to localize a template for another country or language.

Localization in 20 easy steps

Change the paper size

Localization isn't difficult, but you do need to be methodical, checking every format and every margin. Use the following steps as a checklist.

1 Choose Format > Page Layout > Page Size.

2 Choose a new paper size (A4 Letter, for example) from the Page Size pop-up menu and click Set.

Now you'll want to set the measurement units...

Set display units

3 Choose View > Options.

4 Choose cm (or mm, if you prefer) from the Display Units pop-up menu.

5 Choose one of the cm settings from the Rulers and Grid Lines pop-up menus as well.

6 Click Set.

Round off values

Next, you'll want to adjust the format settings in the properties to be round numbers. You want to do this because round numbers in one unit are unwieldy in another. For example, 1.0 inch converts to 2.54 cm, which would be more elegant to change to 2.5 cm. (Granted, this isn't absolutely necessary, but it's one of those niceties that differentiates a well-localized template from a quick-and-dirty job.)

7 Open the Paragraph Designer and choose each format in turn from the Paragraph Tag pop-up menu. Examine the settings and adjust them as needed, clicking Update All for each one.

8 If you've adjusted tab settings, make sure they still look OK and work as expected.

9 Choose Format > Page Layout > Column Layout and round off the values for margins and side heads.

10 You may want to adjust the text frame measurements on the master pages to be round numbers as well.

Change the color library

If your template uses color and is destined to be printed professionally, you should make sure the color library is appropriate. For example. Asian markets prefer using Toyo color definitions. In Europe, you may want to use the Pantone ProSim Euro library. Ask a commercial printer for guidance if you're unsure what library would be most suitable for the locale.

11 Choose View > Color > Definitions and redefine colors using the appropriate color library.

Change the Language property

You'll want to change the Language property in the Default Font of both paragraph formats and character formats. This makes sure FrameMaker uses the proper dictionary when spell-checking and hyphenating.

12 In the Paragraph Designer, choose Set Window to As Is from the Commands pop-up menu, and then choose the language you want (UK English, for example) from the Language pop-up menu.

13 Choose Global Update Options form the Commands pop-up menu and apply Default Font Properties to "All Paragraphs and Catalog Entries." This will change the Language property—and only the Language property—for all paragraph formats.

14 Do the equivalent procedure in the Character Designer.

You might also want to localize the format names to conform to UK English spelling or to translate them into a different language.

15 Open the Paragraph and Character Designers and choose each format in turn from the Paragraph Tag pop-up menu.

16 Edit the name as needed in the Tag text box and then click Update All. Click OK to rename the format throughout the template.

It's common for some formats to insert text automatically. You should check to see if this text needs translating or adjusting. For example, a bullet format inserts a bullet character, which won't need localizing, but a table-title format may insert the word "Table," which will.

17 In the Paragraph Designer, look at the text entered in the Auto-number Format text box for each format.

18 If you need to change the text, click Update All before continuing to the next format.

Depending on the complexity of a template, there may be other formats that need changing. Some of these are rarely used (custom marker names, for example), but others are not infrequent (table formats, for example).

19 Consider renaming the following formats:

♦ Table formats

♦ Custom color names

♦ Conditional text settings

♦ Cross-reference formats

♦ Names of user variables

♦ Names of custom master pages and reference pages

♦ User-defined marker names

20 Test the template and tweak as needed.

FrameMaker Resources

This section contains a listing of resources that FrameMaker template designers and users will want to explore. You can click blue underlined text to open your browser to the relevant Web site.

Online resources

[The Adobe Web site](#) **(www.adobe.com)**

Information about FrameMaker, updates, special events and promotions, tips, and techniques—straight from the horse's mouth.

[Adobe Magazine](#) **(www.adobe.com/publications/adobemag)**

A free bimonthly magazine featuring tips and articles on many of Adobe's products, including FrameMaker. You can apply for a free subscription online.

[The FrameUsers.com site](#) **(www.frameusers.com)**

This Web site is a cornucopia of all things FrameMaker. Up-to-date links to FrameMaker-related companies, newsgroups, free utilities, templates, Framer pages, and more. It provides one-stop convenience for all your FrameMaker needs.

[Charles Poynton FrameMaker page](#)
(www.inforamp.net/~poynton/Poynton-frame.html)

This FrameMaker expert's page contains a wealth of information about FrameMaker, much of it in the form of tips and techniques.

FrameMaker newsgroup (comp.text.frame)

Need help from real-world FrameMaker experts? This newsgroup is the place to go. Share problems and solutions with other Framers from around the world.

Books

Classroom in a Book: Adobe FrameMaker Version 5.5, 1997, Macmillan Computer Publishing, 351 pp. ISBN: 1568303998. Read more about it at Amazon.com.

FrameMaker to HTML, Ken Jackson and Sonya Keene, Addison-Wesley, 1997, 327 pp. ISBN 0-201-31204-2. Not updated for version 5.5, but still contains useful information, Check out the book online at the Harlequin Group Web site.

Learning Adobe FrameMaker: The Official Guide to Adobe FrameMaker, 1996, Macmillan Computer Publishing, 420 pp. ISBN: 1568302908. Applies to version 5.0 only. Read more about it at Amazon.com.