



## Creating Single Source Documents with FrameMaker

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### WELCOME

## What are we doing here?

- **FrameMaker is the best-of-breed tool for creating long, complex documents**
- **A recent WinWriters survey says 56% of Help authors use FrameMaker**
- **Increasingly, content created in FrameMaker needs to be moved online**
- **Single sourcing is the most efficient and cost-effective way to move FrameMaker content online**



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### WELCOME

## Who is this presentation for?

- **FrameMaker template designers**
- **Aspiring FrameMaker template designers**
- **Intermediate to advanced FrameMaker users**




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### WELCOME

## What will we cover today?

- **How to think about templates for single source documents**
- **What to include in templates for single source documents**
- **Template design tips**
- **Tagging tips**

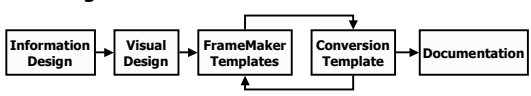


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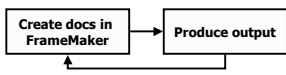
### CONCEPTS

## The single source process

**Defining the Process**



**Using the Process**




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### CONCEPTS

## What a single source document is ...

1. **A document with content designed for multiple output formats like:**
  - Print / PDF
  - Web (HTML, XHTML, XML, CSS, XSL, JavaScript, etc.)
  - Online Help (WinHelp, HTML Help, JavaHelp, etc.)
2. **A document with content designed for multiple audiences like:**
  - End users
  - Developers
  - System administrators
3. **A combination of #1 and #2**




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CONCEPTS

## What a single source document is not ...

- A book
- A Help system
- A Web site

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CONCEPTS

## Writing single source documents

- Takes longer and can be more complex than writing "just" a book or "just" a Help system
- Requires a shift in the way you think about writing

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CONCEPTS

## Using FrameMaker for single source documents

- Create all content for all output formats within your FrameMaker documents
- Automate the conversion to various output formats using a tool like WebWorks Publisher
- Do not edit or tweak the output — everything you want to do can be done within FrameMaker

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CONCEPTS

## CREATING TEMPLATES

- Abandon the notion that you are creating templates for a "book"
- Define tags based on structure and function, not appearance
- Keep it as simple as possible
- Create tags for all unique elements

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CONCEPTS

## Effective single source templates

- Have a compact set of tags
- Have tag names that clearly communicate their purpose and promote correct tagging
- Enable authors to produce all necessary formatting without format overrides
- Are clearly documented

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TEMPLATE ELEMENTS

## Elements defined in single source templates

- Standard book and document files
- Paragraph tags
- Character tags
- Table tags
- Condition tags
- Cross reference formats
- Marker styles

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**TEMPLATE ELEMENTS**

## Book and document files

**Standard Elements**

- Title
- Preface
- Chapter
- Appendix
- Glossary
- Index

**Timesavers**

- LOP for author comments
- LOM for TopicAlias and/or Filename markers
- LOR for unresolved cross references
- LOR for imported graphics

**More** 14

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**TEMPLATE ELEMENTS**

## Tips for books and documents

- Use multiple book files to organize information differently for different output formats
- Use a separate document (or documents) for context-sensitive Help

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**DEFINING TAGS**

## Paragraph & Character Tags

- Keep it simple!
- Create as few as you can ...
- ... but as many as you need


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**DEFINING TAGS**

## Simple

**9 unique character tags**



**47 unique paragraph tags**




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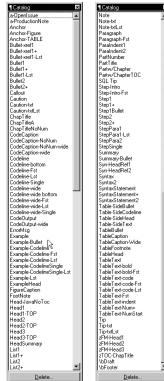
**DEFINING TAGS**

## Not so simple

**21 unique character tags**



**118 unique paragraph tags**



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**DEFINING TAGS**

## Types of paragraph tags

- Headings
- Body Text
- Lists
  - Bulleted
  - Numbered
  - Procedure
- Notes, cautions, warnings, tips

- Anchors for graphics & tables
- Captions for graphics & tables
- Table cells & headings
- Code samples

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**DEFINING TAGS**

## Hierarchy is important for headings

Do not skip heading levels

GOOD	BAD
Heading1	Heading1
Heading2	Heading3
Heading3	Heading3
Heading3	Heading1
Heading2	Heading2

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**DEFINING TAGS**

## Hierarchy is important for lists

Do not skip list levels

GOOD	BAD
•Bullet1	Paragraph
Bullet1-Continued	ParaIndent1
•Bullet1	-Bullet2
-Bullet2	-Bullet2
-Bullet2	ParaIndent1
	Paragraph

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**DEFINING TAGS**

## Anchor tags

- Avoid anchoring graphics and tables to text paragraphs
- Instead, create anchor tags like:
  - Anchor-Table
  - Anchor-Graphic
- If you want to treat different types of graphics differently, create unique tags like:
  - Anchor-Screenshot
  - Anchor-LineArt
  - Anchor-Photo

More

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**DEFINING TAGS**

## Character tags

- Define character tags that reflect the types of elements in your documents, not their intended visual appearance
- Define character tags for standard toolbar formatting: bold, italic, bold italic, etc.
- For hypertext links, create dedicated tags like:
  - Link-URL
  - Link-Email
  - Link-FTP

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**DEFINING TAGS**

## Character tags: Examples

GOOD	BAD
GUI-Element	BoldSansSerif
Filename	BoldSerif
SystemOutput	18ptBold
UserInput	GreenUnderlined
Link-URL	
Link-Email	

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**DEFINING TAGS**

## Tips for paragraph and character tags

- Make sure authors can tag content without using format overrides
- Assign tag names carefully
  - Be consistent
  - Use a prefix for "production only" tags
- Create a "New Page" paragraph tag to force page breaks
- Don't ask tags to do double-duty

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**DEFINING TAGS**




## Table tags

- Define table tags for each unique type of table (based on function, NOT appearance)
- Be sure to create table titles in the Table Designer, not as stranded paragraphs
- For column headings, be sure to use “real” heading cells
- Anchor tables to empty paragraphs using a unique paragraph tag (Anchor-Table)

More

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**DEFINING TAGS**




## Condition tags

- For all output formats, define unique condition tags like these:
  - PrintOnly
  - PDFOnly (if PDF includes unique elements, such as navigational controls—rare)
  - HTMLOnly
  - JavaHelpOnly

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**DEFINING TAGS**




## Cross Reference Formats

- Include opening and closing punctuation in cross reference formats
- Avoid compound cross references like:  
See “Configuration” starting on page 18
- Instead use cross references like:  
See “Configuration” starting on page 18
- Generally, avoid cross references that point only to page numbers, chapter numbers, appendix numbers, and so forth, like:  
See page 12    See Chapter 8    See Appendix C

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**DEFINING TAGS**




## Marker styles

- For context-sensitive Help, you may need to use custom markers like:
  - TopicAlias
  - Filename
- To add custom markers to a FrameMaker template, use them on a reference page

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**DEFINING TAGS**




## Glossary terms

- Create a glossary document, and use a unique paragraph tag for glossary terms
- Create a unique cross reference format for glossary terms
- To include a glossary term in body text, insert it as a cross reference

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**DEFINING TAGS**



## Graphics

- Standards, standards, standards!
- Standards for screen captures
- Standards for placing graphics
  - Always by reference
  - Use a consistent dpi setting when importing graphics
- Anchor graphics to empty paragraphs using a unique paragraph tag (Anchor-Graphic)
- Create unique anchor tags for unique types of graphics if you want to treat them differently

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CONCLUSIONS



## SUMMARY & WRAP-UP

- **Single source templates are different from traditional book templates**
- **When designing single source templates, simpler is usually better**
- **Well designed templates enable you to produce quality work in multiple output formats, while saving lots of time and money**

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## Questions & Answers



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