

# **Using FrameMaker as a Help Authoring Tool**

**Sarah S. O'Keefe**

**President  
Scriptorium Publishing Services, Inc.**

**[www.scriptorium.com](http://www.scriptorium.com)**



Copyright © 1999 Scriptorium Publishing Services, Inc.

# **Introduction**

- **About the presenter**
- **The Problem**
- **The Solution**

Copyright © 1999 Scriptorium Publishing Services, Inc.



## **About the Presenter**

- **President of Scriptorium Publishing, a technical documentation company based in North Carolina**
- **FrameMaker Adobe Certified Expert**
- **WebWorks Publisher certified trainer**
- **Consultant**

Copyright © 1999 Scriptorium Publishing Services, Inc.



Scriptorium Publishing provides a full range of technical publishing services—everything from turnkey documentation to specialized technical editing, training, and consulting. Visit our web site at <http://www.scriptorium.com> for more information.

Sarah O'Keefe is the president and founder of Scriptorium Publishing Services, Inc. The company offers project-based writing, editing, training, and consulting services to clients nationwide. Sarah is a FrameMaker ACE (Adobe Certified Expert), certified WebWorks Publisher trainer, and all-around tools expert. In addition to consulting work, she teaches Scriptorium Publishing's FrameMaker and WebWorks Publisher classes.

## The Problem

- **FrameMaker best choice for long, complex documents**
- **Online help needed**
- **RTF cleanup unpleasant**
- **Dual sources expensive**

Copyright © 1999 Scriptorium Publishing Services, Inc.



For long, complex documents, FrameMaker is the tool of choice for technical writers and other publishing professionals. However, if the content in the FrameMaker files is for print publication and online help, difficulties ensue. As a writer, you are faced with several unpleasant alternatives. You can export your FrameMaker files to RTF, which means you lose your graphics and much of the formatting. Typically, you will need to do all of the following:

- Recreate all hyperlinks
- Reimport graphics
- Reapply styles (the FrameMaker style names are preserved, but they may not match the styles in your help authoring tool)
- Fix corrupted index tags

Cleaning up the exported RTF to produce a usable online help file can take weeks or even months.

Another alternative is to develop the online help and the printed documentation separately. Although you eliminate the RTF clean-up problem, you introduce a different problem: maintaining two sets of the same information. This is inefficient, tedious, and error-prone. Sooner or later, someone will update the help and forget to update the printed documentation, or vice versa.

## **The Solution**

- **Develop content in FrameMaker**
- **Structure content to work in online delivery**
- **Export from FrameMaker to WinHelp using third-party tools**

Copyright © 1999 Scriptorium Publishing Services, Inc.



This presentation focuses on a better alternative. You can develop content in FrameMaker and then export to other formats, such as WinHelp, HTML Help, and HTML. By structuring content in the FrameMaker files so that it will work when delivered online, the reworking problem is eliminated.

This approach requires a thorough knowledge of FrameMaker and an investment in a third-party conversion tool. Currently, there are two tools available that support export of FrameMaker files to online help formats:

- MIF2RTF, from Omni Systems, [www.omsys.com](http://www.omsys.com)
- WebWorks Publisher, from Quadralay Corporation, [www.quadralay.com](http://www.quadralay.com)

## **Developing content in FrameMaker**

- **Structured content**
- **Running headers, variables, cross-references, books, tables of contents, and indexing to manage long documents**

Copyright © 1999 Scriptorium Publishing Services, Inc.



FrameMaker's robust templates offer content developers a lot of structure. Structured elements include paragraphs, characters, tables, variables, cross-references, master pages, conditional text, and more. These elements allow you to create consistent documents.

Other FrameMaker features help you maintain long documents. Automated running headers make it easy to provide navigational guides in each chapter or section. Variables provide a way to ensure consistency in repeated text (and easily update that text globally). The book, table of contents, and indexing features are robust and easy to maintain.

The help conversion tools interpret the structure elements to create the help files.

## **Structuring content for dual delivery**

- **Conditional text**
- **Markers**
- **Dual templates**
- **Cross-references**
- **Hypertext**
- **Tables of contents**

Copyright © 1999 Scriptorium Publishing Services, Inc.



The FrameMaker elements shown on this slide are the key to creating usable online help from your FrameMaker-based content.

## Conditional text

- **Label text for print-only or online-only delivery**
  - **Different introductory statements**
  - **Links needed in online help**
- **Embed code to be used without conversion**
- **Maintain two versions of a single document in one file**

Copyright © 1999 Scriptorium Publishing Services, Inc.

S

FrameMaker's conditional text feature lets you tag portions of your document and then show or hide a particular version. For example, you might tag detailed conceptual information as "print-only." When you print the document, you first make sure that the "print-only" condition is displayed. When you create online help from your documents, you hide the text that is labeled "print-only." This lets you maintain two versions of the same document in a single file.

You may also find that you need to create navigation links throughout your help file. For example, you might want to put a list of links at the beginning of a major section. Those links would become hyperlinks in your online help. But in your printed document, you might write, "see the next few pages for details." (For now, let's set aside the debate on whether this generic cross-reference is a good idea, even in print.) With conditional text, you could create your list of links and tag it as "online-only"; then create the alternate "see the next few pages..." statement and tag it as "print-only." You adjust which conditional tags are displayed to control which version of the document is used.

If you are developing HTML files to be used as help, you may want to use JavaScript or other code in your final output. Conditional text offers one way to include this code in your source FrameMaker files. You create a separate condition tag for your JavaScript code. Then, you embed the code into the FrameMaker file and tag it with the "code" tag. Then, you set up your conversion tools to use the "code" conditional text without any processing. Instead, the tool passes through the code you've created.

## **Markers**

- **Index information**
- **Cross-reference information**
- **Provide support for ALink macros, KLink macros, URLs, and more**
- **Marker text not displayed in the print version**

Copyright © 1999 Scriptorium Publishing Services, Inc.

S

FrameMaker's markers are hidden text. But unlike conditional text, the information contained in markers cannot be displayed in the document. By default, markers are used for index entries and cross-reference anchors.

The index markers in FrameMaker are translated as K footnotes in RTF-based help. The contents of K footnotes are compiled into the WinHelp index.

Cross-reference anchors are stored in cross-reference markers. These markers are translated into hyperlinks in WinHelp.

Markers provide a handy place to store information. For example, you can use them to define keywords for A footnotes (used with ALink macros) or to specify a URL for a web link.

## **Dual templates**

- **Allow customization of appearance of cross-references for print and online**
- **Store conditional text settings**
- **Optimize page layout for print and PDF**

Copyright © 1999 Scriptorium Publishing Services, Inc.



Because templates control so many different document attributes, using two templates allows you to make global formatting changes in seconds.

For example, you can import formats from the online help template to set conditional text to show online help-specific information and to hide print information.

To optimize your page layout for print and PDF, you might create one template that uses a 6" x 9" page size and a second template that uses a page setup that is better suited for viewing online.

## **Cross-references**

- **Become live hyperlinks in online help**
- **Can customize formats for print and online delivery**

Copyright © 1999 Scriptorium Publishing Services, Inc.



FrameMaker's cross-references provide pointers from one part of a document to another. These links are converted to regular WinHelp hyperlinks when you convert the files.

A common technique is using two templates and modifying cross-reference formats so that they appear in text with the needed formatting and page numbers:

For more information, see "Setting up conditional text" on page 17.

In the online help, much less is required because the underline and the colored text provide a visual clue for the link. The page number is not needed because the link itself takes the reader to the information when clicked (and because page numbers have no meaning in an online environment):

For more information, see Setting up conditional text.

## **Hypertext commands**

- **Commands embedded in FrameMaker converted to hyperlinks in online help**
- **Support for segmented graphics**

Copyright © 1999 Scriptorium Publishing Services, Inc.



FrameMaker includes a hypertext language. Most of the hypertext commands are translated to WinHelp equivalents when you export the files.

Hypertext commands also give you the ability to create segmented graphics (called image maps in the HTML universe). You can set up a graphic that has different live areas and translate these areas into a WinHelp-supported segmented graphic.

## **Tables of contents**

- **Generated table of contents becomes contents file (.cnt or .hcc) in help.**
- **Can create tables of contents with more levels for online help and fewer levels for print.**

Copyright © 1999 Scriptorium Publishing Services, Inc.

S

To generate a table of contents in FrameMaker, you identify the paragraph tags that you want to include in the table of contents. During generation, FrameMaker scans your files for each instance of the specified tags. Every occurrence becomes a line item in the table of contents.

In WebWorks Publisher, this generated table of contents becomes your .cnt file. Quadralay's product parses the table of contents to strip extraneous formatting and then creates the entries in the .cnt file.

In MIF2RTF, the approach is slightly different. Instead of using the existing table of contents, you specify to the filter which paragraph tags you want to include in the help contents file and at what level. This allows you to create a table of contents in your help file that uses different (or more) headings than your printed table of contents.

You can accomplish the same thing in WebWorks Publisher by generating a table of contents that is customized for online help before you convert the FrameMaker files.

## Putting it all together

- **FrameMaker**
- **Conversion tool: WebWorks Publisher or MIF2RTF**
- **Help compiler**

Copyright © 1999 Scriptorium Publishing Services, Inc.



To use FrameMaker as a help authoring tool, you'll need three components: your authoring tool (FrameMaker), your conversion tool (WebWorks Publisher or MIF2RTF), and the help compiler (hcv).

Each component is dependent on the others to ensure that the conversion works properly. For example, WebWorks Publisher reinterprets the tags used in FrameMaker to create RTF files. Those RTF files, in turn, are interpreted by the help compiler to create the help file.

## **Modified single-sourcing**

- **Single file with customization for print and online**
- **Conditional text key to usable help and print**
- **Must plan templates and navigation carefully**
- **Imposes structure on the help**

Copyright © 1999 Scriptorium Publishing Services, Inc.



Developing your help files in FrameMaker does mean that you're are single-sourcing your print and help materials. However, the content in the printed and online versions is not identical, because you can use FrameMaker's conditional text feature to target information to print only or help only. We call this "modified single-sourcing."

To ensure that the conversion produces user-friendly help and printed documentation, it's important to plan the templates carefully. Because the help navigation is dependent on the structure inherent in the FrameMaker file, building a help file through FrameMaker forces the help developer to think structurally. This can be difficult for someone who is accustomed to developing ad hoc.

## **Conclusion**

- **Working with FrameMaker requires knowledge of RTF or HTML tagging.**
- **Structure can improve your help, but it also requires discipline.**
- **Conversion template takes time to develop.**

Copyright © 1999 Scriptorium Publishing Services, Inc.

A large, bold, black letter 'S' is positioned on the right side of the page, partially overlapping the bottom right corner of the main content box.

## **Conclusion** *(continued)*

- **Conversion time is minimal (one or two hours for very large projects).**
- **A better choice than maintaining two sources or converting manually.**

Copyright © 1999 Scriptorium Publishing Services, Inc.

S