Adobe® FrameMaker® 11

CLASSROOM IN A BOOK®
The official training workbook from Adobe Systems

Instructor Notes

Introduction

The *Adobe FrameMaker 11 Classroom in a Book* course provides students with techniques, tips, and solutions for creating and updating technical publications using Adobe FrameMaker 11 software. These instructor notes are intended to complement the information in *Adobe FrameMaker 11 Classroom in a Book* and to provide insights and behind-the-scenes information specifically for classroom instructors. The information in these notes is organized to follow the sequence of instructions in each lesson.

About the workbooks

It is recommended that each student in the class have an individual copy of *Adobe FrameMaker 11 Classroom in a Book*. Students will use this book as you guide them through the lessons. You can buy copies of *Adobe FrameMaker 11 Classroom in a Book* for your students, or you can refer them to AdobePress.com to purchase the eBook.

Course strategy

This book consists of 15 lessons. The first half of the book contains instructions on creating a single publication. You should be able to cover lessons 1–7 in a two-day Introduction to Adobe FrameMaker 11 class. Depending on the time, Lesson 8 can be covered in that class or assigned as homework. Lessons 9–15 can be covered in a two-day Advanced Adobe FrameMaker 11 class. There should be a little time at the end of the second day to troubleshoot student's actual publications.

The lesson exercises are designed to introduce students to the FrameMaker tools and functions, as well as to important concepts in laying out technical publications. The lessons cover the unstructured features of Adobe FrameMaker 11; they do not cover the structured features.

Students will create one chapter in its entirety and then learn how to collect multiple chapters into a book. From there, they will learn how to control book pagination and generate both a table of contents and an index. They will also learn how to use conditional text for multi-version documents and how to output to PDF and HTML.

Managing student projects

One way to simplify file storage and cleanup in the classroom is to instruct students to create a main folder named [*Student's Name*] on their desktop; this folder will contain all the lesson content. Keeping all the files in this folder will make cleaning up the files easier when the course is complete.

Two methods for completing the course

The course can be completed in two different scenarios. The intended scenario requires the student to build a book by completing the lessons in order. In this method, lessons must be completed in sequence to build the files for each subsequent lesson. This method simulates the scenario an actual technical writer experiences when building a publication from scratch. However, this method can be difficult and prone to error, because it relies on the successful completion of each lesson. Incomplete or incorrectly built chapters from one lesson may adversely affect a subsequent lesson.

To remedy this issue, a second method for completing the course is offered. It is referred to as the "jumpstart" method. The jumpstart method treats each lesson folder as if it were a complete project and includes all pages and assets needed to complete the specific requirements or goals of the lesson.

This method is also a good way to repeat a specific lesson or topic that a student is having difficulty with. When following the jumpstart method, pages and assets from one lesson folder should not be used in another, unless so directed by the instructions within the lesson itself.

Additional resources

Instructors and users of FrameMaker rely on a variety of resources to supplement their knowledge of the program. You may find the following resources useful.

FrameMaker Help

The Help feature of FrameMaker 11 uses a new AIR-based application that will provide a richer experience for most users and that includes complete descriptions of all the program's features. Since the Help files are hosted online, they can be updated live and will feature the latest documentation. If you think you may need to access the Help files offline, you can download them as a PDF document to access the information at any time. The Help client also contains links to movies that showcase new FrameMaker 11 features and techniques.

Adobe website

The Adobe website (www.Adobe.com) contains a variety of FrameMaker training and support resources. Many step-by-step tutorials, galleries, and other resources are available there, and the user-to-user forums are great places for students to learn from more experienced users. The Adobe Developer Center (www.adobe.com/devnet/framemaker.html) provides dozens of tutorials and articles by experts and authors in the Adobe community, as well as thoughtful articles about design and technology.

Adobe Certified Expert (ACE) program

This program is designed to validate an expert skill level in Adobe FrameMaker. Testing procedures ensure that each ACE-certified student demonstrates expert product knowledge of the current release of Adobe FrameMaker, resulting in enhanced marketability and credentials for ACE graduates. ACE program training is available through Adobe Authorized Learning Providers (AALP) and self-study. For more information about this program, send an email to certification@adobe.com or visit the Adobe website (www.Adobe.com).

Lesson 1: Exploring FrameMaker 11

In Lesson 1, students are introduced to the FrameMaker 11 interface and are familiarized with program commands and conventions. Students experiment with different standard workspaces and are shown how to create a custom workspace for use in class.

Interface

Take a few minutes to discuss the importance of a workspace: when students use a consistent workspace, they don't need to search for a panel—they will know exactly where to find it. This technique will streamline their production time.

Take this opportunity to provide students the vocabulary terms that you will be using in class: Be sure that they understand the terms menu bar, Application bar, toolbar, ruler, document window, status bar, pod, and panel and that they know where they are.

Students should also practice changing pages and zooming in and out so they don't need to think about how to do so as the exercises become more advanced. Properly setting the stage in Lesson 1 allows the subsequent chapters to flow more smoothly in class.

Templates

FrameMaker comes with additional templates beyond the templates you access in Lesson 1. The Adobe FrameMaker Template Series is a collection of over 150 professionally designed templates. Using the templates, you can create technical manuals, cookbooks, websites, and many other types of publications entirely in FrameMaker. They've also thrown in over 30 custom table formats, multi-purpose borders, and special features, such as guidelines, pre-built fractions, customizable variables, and tables of contents.

The template packs are normally installed in c:\program files\adobe\adobeframemaker11\samples\moresamples.
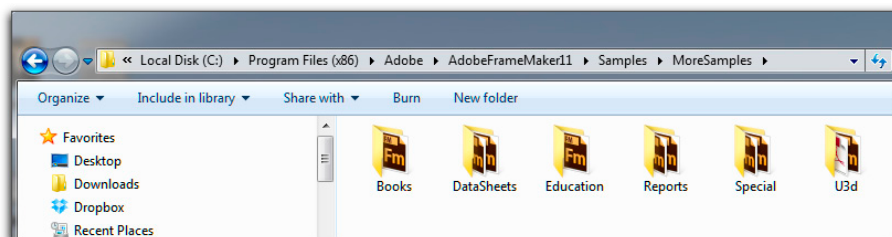
Lesson 2: Defining Paragraph Formatting

In Lesson 2, you will help your students create a new chapter from scratch. They will define a new document, add text, and format the paragraphs.

Importing text from Word

To keep things simple, your students will cut text from a FrameMaker file and paste it into their new project file. This is a skill that they will use in real life, but they also need to learn how to get text from Microsoft Word. Take a few minutes at the end of the lesson to open a basic Word document and demo the three techniques, comparing the results:

1 File > Open

2. File > Import > File

3. Edit > Cut (in Word), Edit > Paste (in FrameMaker)

Emphasize that the "best" way to get text from Word to FrameMaker depends on their specific workflow and the documents they are using. They should be familiar with all three techniques so they can select the best one in any given situation.

Apply vs. Update All

Take some time to compare Apply and Update All in the Paragraph Designer, and touch on the concept of overrides, pointing out the asterisk that appears in front of the tag name after clicking Apply. This concept is used in all three Designers.

Numbering

Students will often raise additional questions on numbering. Take advantage of the template files that come with FrameMaker to show examples of numbering. The Report, Numeric; Outline, Harvard; and Outline, Numeric templates can be used to illustrate the answer to almost any question you will be asked. Remind students that while these templates may look dated, they still offer a tremendous learning opportunity.
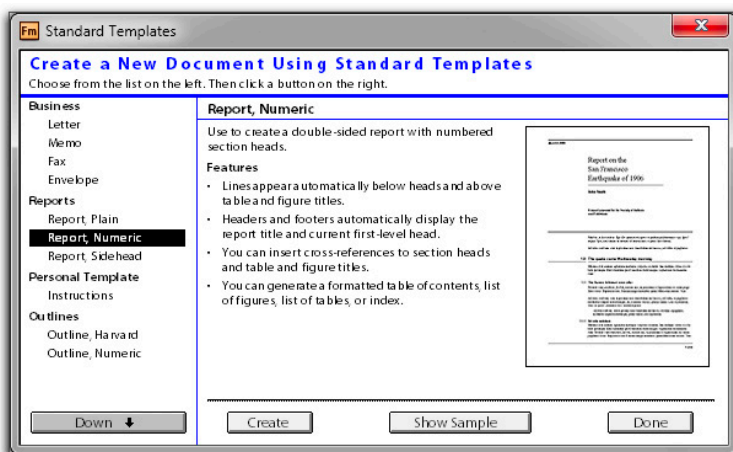
Bonus activity

Indents are confusing to many FrameMaker users. If you have time, demo the application of first line indents, left indents, and right indents using the Basic properties in the Paragraph Designer. Remove them, and demo it again using the triangles in the ruler bar. Explain that you can make the same modifications with either technique. Be sure to point out the overrides that are applied automatically when you use the ruler bar, and use the opportunity to test for understanding on Apply versus Update All.

Lesson 3: Defining Colors and Character Formats

Lesson 3 is very short and covers two unrelated topics: defining colors and working with character-level formatting.

Colors

Many FrameMaker documents still don't use color in their printed documentation. Remind students that if they are publishing their files online, color is free. This exercise uses a spot color and tint: You will need to explain the difference between process colors and spot colors, and the cost benefit of tints in a print-intent document.

Character formatting

Make a point to compare paragraph-level formatting (as you update the heading colors) with character-level formatting (as you emphasize text phrases). Remind students that paragraph tags always update an entire paragraph regardless of what you select within the paragraph, and that character tags will apply your formatting only to the selected text.

Lesson 4: Page Layout

Lesson 4 covers page-level formatting. This is where you introduce your students to body pages and master pages.

Updating the original page specifications

The activity on updating the margins may bring up questions on updating the page size and orientation in an existing document. Use Format > Page Layout > Page Size to change the paper size. Reverse the width and height values to change the orientation.
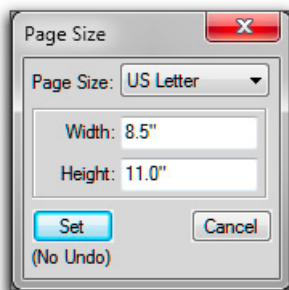
Default master pages

Emphasize that any object placed on a default master page will automatically appear on the appropriate body page. Encourage the students to zoom out so that they can see the left and right pages simultaneously, and be sure to introduce the master page vocabulary: *background frames* and *template frames.*

When you update the Header and Footer tags, point out the asterisk before the paragraph tag name. In this case, the asterisk does not indicate an override, but instead that the paragraph tag does not appear in the catalog.

Custom master pages

Let your students know that they are allowed a total of 100 master pages in a single document, though most won't need more than a few. Stress that while the custom master pages allow additional page layouts in a single file, students have the burden of both creating their custom master pages and assigning them.

Lesson 5: Graphics

Lesson 5 covers importing an image onto a page (importing images into anchored frames is covered in Lesson 9) and how to draw and manipulate objects using the Graphics toolbar.

● **Note:** If your students are using the file they created in the previous lesson, and not using the jumpstart file called Graphics.fm in the Lesson05 file folder, then they will be missing two colors: PageRule and FooterColor. You can use this opportunity to introduce File > Import > Formats and have them import just the color definitions into their file from Lesson05\Finished.fm.
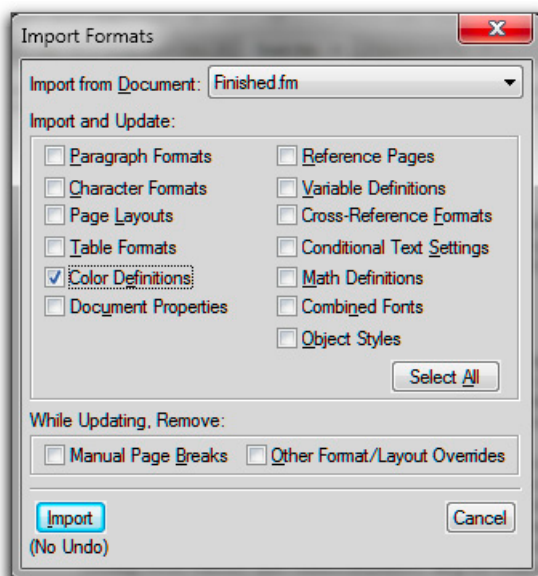
Modifying the background frames

Technical documents frequently have multi-line running heads that will not fit in the standard background. Show students how they can move and resize the frames using the Select Object tool, Graphics > Object Properties, or a combination of both techniques.

Importing a graphic

In this activity, students will import a native Adobe Photoshop file (Banner.psd) onto the master pages. This is a good place to point out that graphics can be imported either into anchored frames that move with the text (covered in Lesson 9) or directly onto a page. The banner should be page-anchored, and not within an anchored frame.

Point out that this file was pre-sized to fit the page width in Photoshop. Stress that in a streamlined workflow, the final size and resolution of image files should be specified in an image-editing application (typically Photoshop).

Drawing shapes

In this activity, students will begin exploring the tools in the Graphics toolbar. Point out the light gray horizontal line in the middle of the toolbar: The tools above the line are used to select objects (top row), or to add new objects onto the page. The tools below the line are used to modify the appearance of the objects.

Bonus activity

If time allows, take an opportunity to demonstrate the power of File > Import > Formats. Open Text.fm from the Lesson02 folder and ask the students how long they think it will take to make this file look like Graphics1.fm. Show them how quickly they can format additional chapters once the initial design choices have been made.
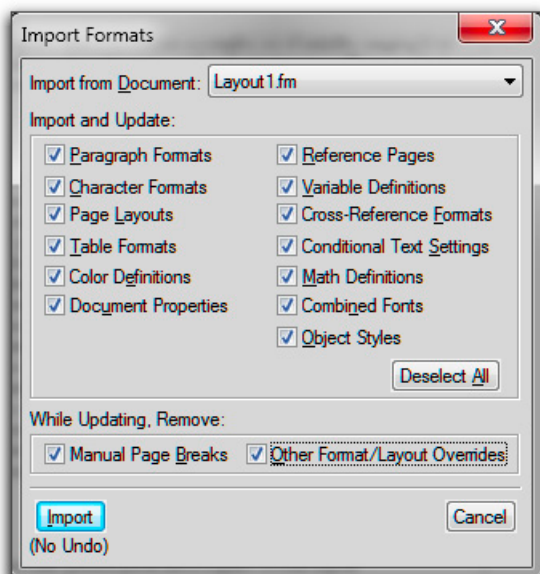
Lesson 6: Document Editing

Lesson 6 covers the editing tools in FrameMaker 11. While the document in this lesson does not remotely resemble a typical technical document, you can use it to point out the flexibility of FrameMaker 11. In addition to producing technical publications, it can be used to produce playful publications as well.

User variables

Most technical publications will benefit from the use of user-defined variables. They are used when the writer is documenting a product with text that they know will be changed later; product names, product numbers, revision numbers, and even company names are all good candidates for user variables. Once students understand the concept of variables (use LongName to illustrate how variables work), they often express the wish that they had learned the feature prior to attending class. Point out that they will then retrofit this document with a new variable called ShortName.

Find/change, spell-check, and the Thesaurus

In this activity, students will cover basic editing commands that they are likely to have already used in Microsoft Word. The find/change activity assumes prior knowledge of the Find/Change command and illustrates an advanced change. If your students are not already familiar with basic find/change commands, take a few minutes to demo a basic text find/change before moving on to the exercise.

Bonus activity #1

If you have time, take a few minutes to demonstrate Smart Spaces and Smart Quotes. Explain how important they are to producing professional documents, and explain how to use spell-check to correct spacing and quotation errors in an existing file.

Bonus activity #2

If you have time, show how to access special characters. Start with the Symbols button on the Quick Access bar:
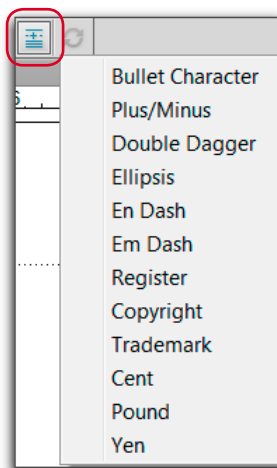
Move on to Help > Help Topics > Keyboard Shortcuts > Special Characters, covering all three tables:

Lesson 7: Tables

Lesson 7 covers table basics. In this activity, your students will insert a new, empty table. Next, they will type in the data and then format the text and the table. (Importing existing tables from Microsoft Excel is covered in Lesson 8.)

Vocabulary

Set the stage for the next two chapters by defining table vocabulary. In addition to explaining the terms shown below, make sure your students know how to identify and select the *table anchor*. They should also be made aware that table titles, heading rows, and footing rows automatically repeat when a table breaks across pages.

A. Table title   **B.** Heading row   **C.** Body rows   **D.** Columns

Table toolbar

Having to format multiple tables in a publication tends to slow down the layout process, so they represent an area where you can emphasize streamlining the workflow, which will yield immediate benefits. Take a few minutes to work your way through the Table Formatting toolbar—efficient use of the table buttons can greatly speed up table formatting.
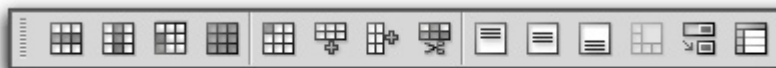
Lesson 8: Customizing Tables

Lesson 8 makes a terrific "on your own" activity. There are three new concepts introduced in the chapter; the rest of the lesson is a review of the table skills they learned in Lesson 7. If you demo the three topics shown below, the students will be able to easily complete the chapter on their own, building confidence in their skills as they go.

Importing a table from Excel

Remind students that File > Import > File can be used to import any type of supported file into FrameMaker, including Word docs (covered as a bonus activity at the end of Lesson 2), Photoshop files (Banner.psd in Lesson 5), and now an Excel spreadsheet. You can take advantage of the appearance of the Unknown File Type dialog box to show students the formats that are supported by FrameMaker. Scroll up and down through the list to see the file import filters.
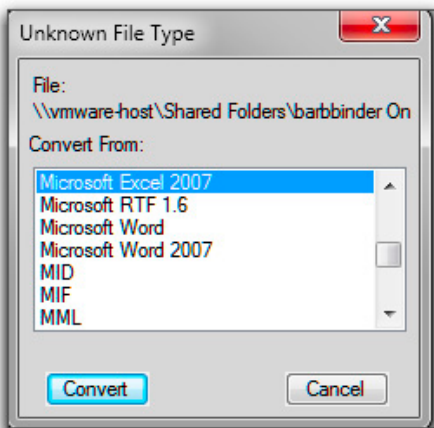
Tabs in tables

Sometimes the easiest way to indent the first line of a paragraph is to simply add a tab character in front of the text and then set the tab stop. Since the Tab key is used to navigate from cell to cell in a table, show the students how to add a tab character within the table by pressing the Esc key and then the Tab key.

● **Note:** Adding a leading tab character to data columns is the only way to achieve decimal alignment within a FrameMaker 11 table.

Custom ruling and shading

The single best way to streamline table formatting is to completely avoid custom ruling and shading options. If your students can redesign their tables using the features available in the Table Designer, they will be able to quickly assign their table tags to all of their tables, and they can update the format quickly and easily. Table formats that rely heavily on custom ruling and shading require the user to manually add (and perhaps later manually modify or remove) the custom rules and shades.

That said, sometimes it's the only way to achieve the desired formatting. Introduce the concept of custom ruling and shading, but also show your students how to remove it later by setting the format to From Table before clicking Apply.
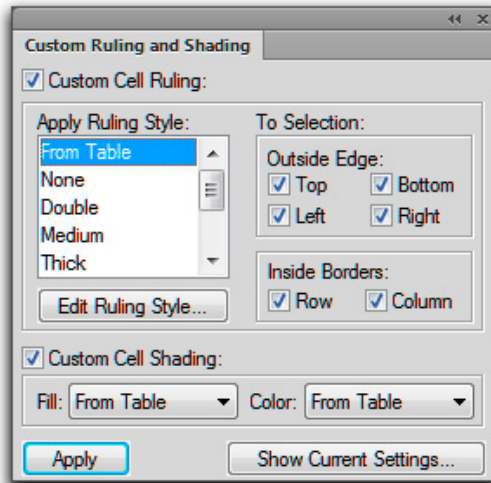
Lesson 9: Anchored Frames and Graphics

Lesson 9 covers how to import graphics into anchored frames and how to control their positioning.

Importing the first graphic

Take your time importing the first graphic, and introduce the new terminology: the *frame anchor*, the *anchored frame*, and the *graphic* within the frame. Point out that if you have a blinking insertion point in the text when you choose File > Import > File, then the graphic will automatically appear within a new, anchored frame and will move along with your text edits. If you don't have a blinking insertion point, the graphic will appear centered on the page and will not move unless you drag it to a new position.

Importing the second graphic

If your students are amenable to keyboard shortcuts, this is a good time to introduce them. The second graphic uses the exact same import sequence as the first graphic, so it gives you a chance to show how much time can be saved with shortcuts. Specifically, position the cursor after *but Kamehameha insisted* and enter the actions in the first column:

ACTION	RESULT
Enter	Starts a new paragraph
F9, A, Enter	Assigns the Anchor tag
Esc f i f	File > Import > File
Double-click Temple.tif	Selects Temple.tif
Enter	Accepts the custom dpi
Esc m p	Shrinkwraps the image

Object styles

Object styles are new in FrameMaker 11 and still need refinement. For example, the Object Style Designer isn't a panel like the other Designers; it's a dialog box that needs to be opened and closed each time you use it. In addition, sometimes you will see results applied to an object when you click Apply; other times, you will not see the results until you close the dialog box.

Lesson 10: Cross-References and Footnotes

Lesson 10 covers two unrelated topics: cross-references and footnotes.

Cross-references

Cross-reference activities make up the majority of the chapter. Be sure that students understand the difference between a paragraph cross-reference (references an entire paragraph—usually a title, heading, table title, or figure title) and a spot cross-reference (references specific text within a multi-line paragraph).

Bonus Activity

If you have time, show students how to locate unresolved cross-references with the Find > Unresolved Cross-Reference command.
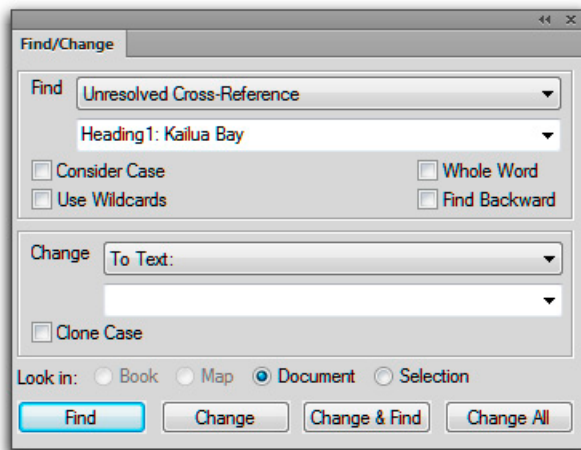
Footnotes

Let students know that if a Word document already has footnotes in it, they will automatically appear at the bottom of the page when the Word document is imported into FrameMaker. Warn your students that long footnotes will not break across pages in FrameMaker 11. If the entire footnote can't fit at the bottom of the same page as its reference number, the entire footnote moves to the next page (leaving the reference number behind).

Bonus activity

If there is time, use footnotes as a way to start the discussion on reference pages. After you show how to modify the footnote rule, show your students how to add images to the first reference page, and how to attach reference page images to paragraphs tags. In the example below, the red flower was added to the reference page, and it was attached above the Heading1s via Paragraph Designer > Advanced > Frame Above Pgf:
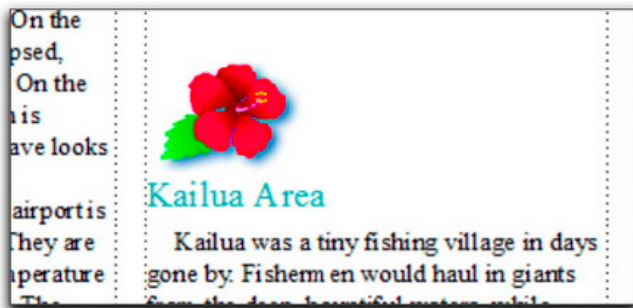
The reference pages will be discussed in more detail in Lessons 11, 12, and 15.

Lesson 11: Books and Tables of Contents

Lesson 11 covers how to create a book, how to control numbering across multiple files within a book, and how to create a table of contents.

Books

Your students will be working with books in Lessons 11, 12, and 14. Set the stage by reviewing the components of the book window:

A. Add a file to the book

B. Add a folder in the book

C. Add a group in the book

D. Save the book file

E. Delete a file from the book

F. Update book

G. Arrow keys to move book components

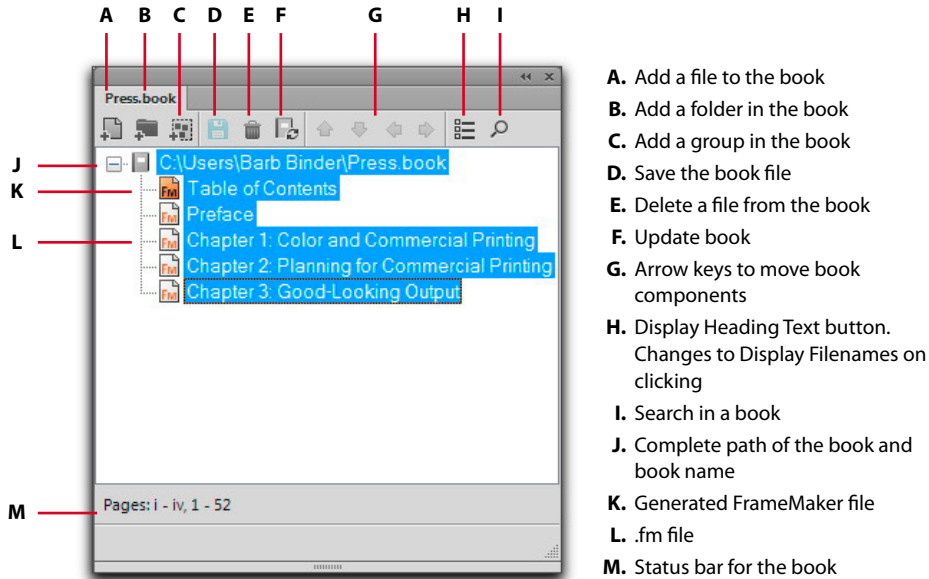**H.** Display Heading Text button. Changes to Display Filenames on clicking

I. Search in a book

J. Complete path of the book and book name

K. Generated FrameMaker file

L. .fm file

M. Status bar for the book

You can minimize confusion in this chapter by pointing out that the menus are significantly different when the book window is active as opposed to when a document window is active. Menu commands that are visible when a document window is active disappear when the book window is active. The contents of the menus change significantly as well.

Trouble updating the book

If a student is having any issues with missing fonts, they will not be able to update their book unless all of the files are open. Open all the files involved in the process: In the book window, have them hold the Shift key and choose File > Open All Files in Book. Once the files are open, FrameMaker will ignore the missing font issue, and the student will be able to update the book.

Table of contents

The two most important topics to emphasize in this section are the following:

1. Always avoid typing directly in a generated list, as this negates the best feature of lists: easy updates after entering edits to your chapters. When you update your lists, FrameMaker removes all existing text and replaces it with the text from the source files. When a student sees a mistake in a list, it comes from a mistake in the source file. Fix the source file and update the list, and the mistake will be corrected.

The only exception to "never type directly in a generated list" is for list titles. For the titles to remain after an update, they must be at the top of the flow, and they cannot use a paragraph tag name that ends with the list suffix (i.e., TOC).

2. The presentation of the text and page numbers is controlled by the reference page with the same name as the list suffix (i.e., TOC). However, reference page changes in generated files don't take effect until you update your book.

Other lists

As you wrap up this chapter, you may receive questions on how to create a list of figures or a list of tables. Let students know that the table of contents is the most frequently used list, closely followed by the list of figures and the list of tables. All of the lists shown in the screenshot below work essentially the same way. They collect the specified tag (or marker) from the source files, and present the information in chronological order (order of appearance) unless you select a list with the word *Alphabetical* after it. They follow all of the same rules as a table of contents.
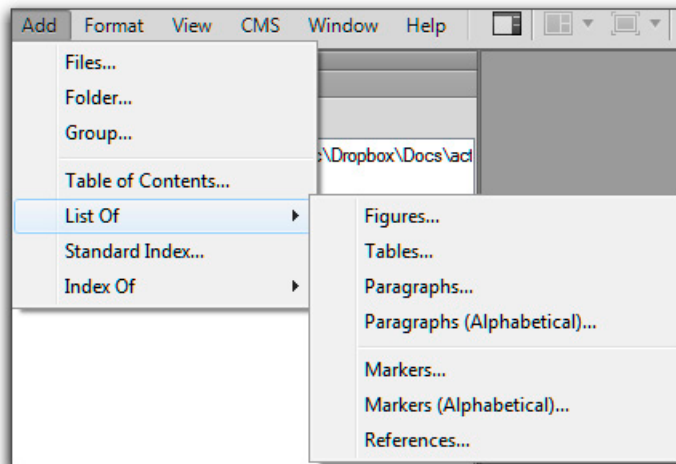
Lesson 12: Indexes

Lesson 12 covers how to create an index in FrameMaker. Generating an index is very similar to generating a table of contents or any other generated file, so use the beginning of this exercise to reinforce concepts learned in Lesson 11.

Trouble updating the book

If a student is having any issues with missing fonts, they will not be able to update their book unless all of the files are open. Open all the files involved in the process: In the book window, have them hold the Shift key and choose File > Open All Files in Book. Once the files are open, FrameMaker will ignore the missing font issue, and the student will be able to update the book.

Adding an index

This is the one chapter in *FrameMaker 11 Classroom in a Book* that is taught out of order from "real life." In real life, a finished manuscript is turned over to a professional indexer, who reads the manuscript and adds index markup to the margins. The manuscript is then returned to the technical writer, who is responsible for manually entering the index codes into FrameMaker. To save time, the chapter files in Lessons 11 and 12 are fully indexed—all of the index codes have already been manually entered. Unless you clarify this before you start this lesson, some students may think that FrameMaker magically knows exactly what words should be included in the index. This is not the case. A good index requires the hard work of a professional indexer; teaching what to index is beyond the scope of this book. You will still be teaching index markup, but not until the end of the chapter. There are several missing index entries and several incorrect entries. You will use these to teach index coding.

Lesson 13: Conditional Text

Lesson 13 covers conditional text, which is used to maintain several versions of a file within a single document or book. Some students purchase FrameMaker and attend multiple days of training simply to learn to use this one feature effectively.

Viewing conditional text

While you will find that some students have purchased FrameMaker specifically for this one feature, the majority of your students will have no prior knowledge of conditional text. To start, show students how a finished document behaves by hiding and showing the condition tags and indicators in Lesson13\Finished.fm. Move on to setting up the new conditional document only after they fully understand the concepts.

Setting up a document

Conditional text documents can be a beautiful thing or a nightmare. It all comes down to how the condition tags are assigned. Emphasize that all FrameMaker users within an office workgroup must follow the same rules when it comes to applying condition tags—consistent application is the key to success. Some offices mandate that tags be applied to whole paragraphs. Other offices allow tags to be assigned to words within a paragraph. This can be tricky if the spacing isn't handled consistently. In this activity, whenever a tag is assigned to text within a paragraph, the leading space is also tagged.

Proofing condition tag application

Knowing that mis-tagged spaces can derail a conditional document, it is important to proof the tag application carefully. Since color can't be added to a space, students should assign either a style (i.e., overline, underline, strikethrough) or a background color.
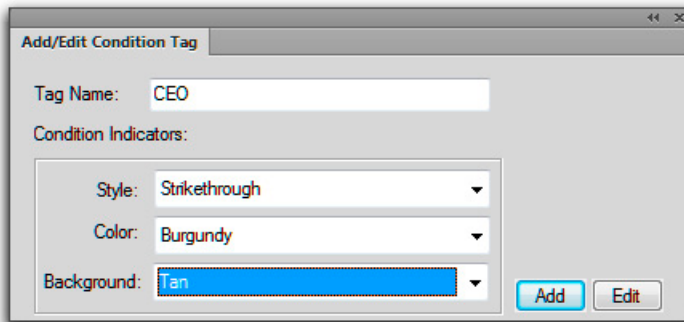
Lesson 14: Hypertext and PDF

Lesson 14 reviews books, cross-references, table of contents, and indexing. Once the book is updated, students will create a PDF with hyperlinks from FrameMaker. Adobe Acrobat or Adobe Reader must be installed to view the results.

Using templates with generated files

Your students learned in Lessons 11 and 12 that a newly generated list requires a lot of formatting. In this lesson, they will learn how to use templates from previously generated lists (a TOC and an index) to format a file as it is generated. If a student is having any issues with missing fonts, then this exercise will not work. The solution is to open all the files involved in the process—all of the files in the book, and the empty template files in Lesson 14 (HyperlinksTOC.fm and HyperlinksIX.fm). If the files are open, FrameMaker will ignore the missing font issue.

Hyperlinks

FrameMaker 11 supports a variety of hyperlinks, but not all of them will work in Adobe Reader or Adobe Acrobat. This activity includes three types of automatic hyperlinks (TOC, Index, & Cross-References) plus three manual hyperlinks (Next Page, Previous Page, and Back). All of these will be clickable links when the FrameMaker file is saved as a PDF. Other supported hyperlinks include First Page, Last Page, and Alert Box (which becomes a sticky note in Acrobat).

Bonus activity

If time allows, point out to those students who routinely fill out the metadata fields in Acrobat that they can save time by filling them out in advance in FrameMaker 11. In a book or document, they can enter the Author, Title, Subject, and Keywords fields using File > File Info.

When the file is saved to PDF and opened in Adobe Reader or Adobe Acrobat, the metadata contents will already be there.
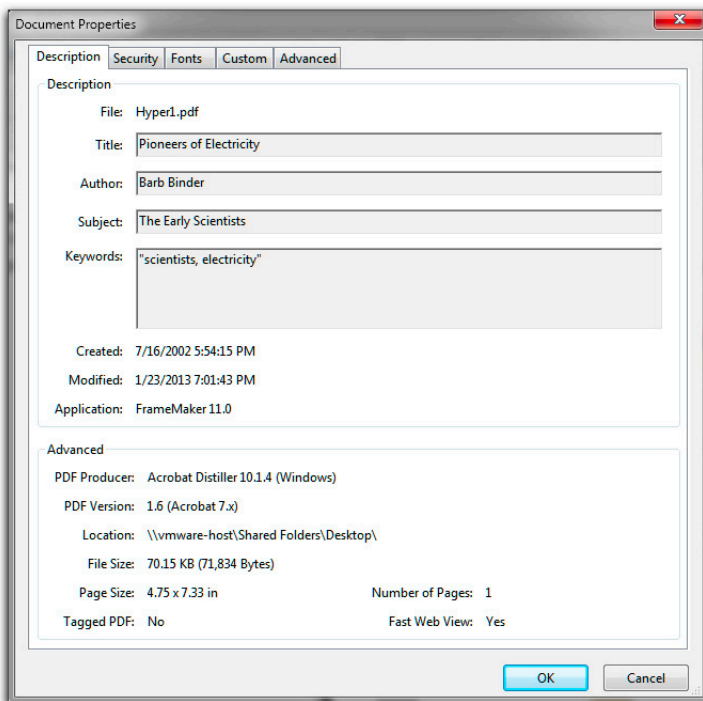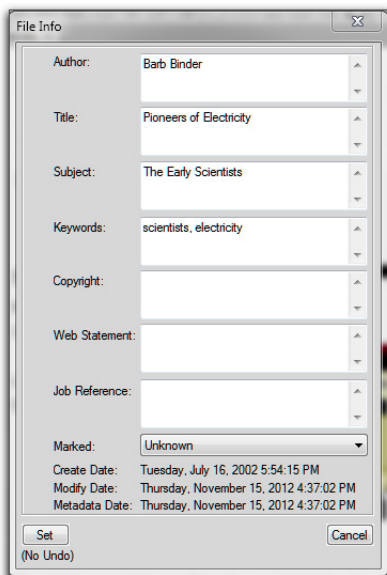
Lesson 15: HTML and Web Publishing

Lesson 15 covers converting a FrameMaker document into an HTML file for posting on a website.

Saving as HTML

As you begin to teach this final lesson, it may be worth reminding students that these days, most of us don't create Web pages from FrameMaker documents. Web page editing programs such as Adobe Dreamweaver CS6 make it very easy to create complex Web pages from templates. But from time to time, some of us still need to publish articles from FrameMaker to websites in HTML format. The conversion is quick and easy and can be refined through the reference page tables, but the results will most likely need additional refinement in a Web page editor.

As you move into the activity, take a moment to compare a PDF to an HTML document. Both can be added to websites; the difference is that a PDF is an exact copy of the original FrameMaker document (same fonts, line breaks, hyphenation points, etc.), whereas HTML will have the same content, but the formatting may be quite different.

Advanced topics

The final activity of this chapter is highly technical and involves writing HTML code in the reference page tables. Keep in mind that this is the final activity in the book, and that you always want to end class on a positive note. Unless your students are already familiar with hand-coding HTML, typing code can be a tedious and frustrating experience. Consider offering an overview of the HTML tables: explaining what they are used for, showing the tables in Lesson15\Finished.fm, and explaining how they produce the links seen in Finished.html. If they don't need to generate HTML files from their FrameMaker documents, then it is more important for them to simply understand what the final reference pages control, so that they recognize them as they work on their own documents after class.