Requirements for Successful FrameMaker/Acrobat Implementation

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The Written Word, Inc.

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This paper reviews the implementation of documentation and publishing systems that use Adobe's FrameMaker™ and Acrobat® software in the business setting. Issues covered in this report include:

- Selection criteria for FrameMaker and Acrobat: When to use these products.
- Requirements for successful implementation: The planning and experience requirements for a smooth transition to Adobe's large-document and electronic publishing solutions.
- The Written Word, Inc.: How our company approaches FrameMaker/Acrobat Implementation.

This paper is designed to provide a simple overview of the implementation process — if you have any questions about FrameMaker or Acrobat implementation, or would like to prepare an implementation plan, please contact The Written Word, Inc.:

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SELECTION CRITERIA

FrameMaker and Acrobat are not end-all solutions. Both products are powerful solutions targeted at specific content development and publication scenarios — however, both may add unnecessary complications to a project.

The first key to successful implementation is knowing when to use these products, and when not to.

FrameMaker

FrameMaker is a powerful long-document publication system. It includes a complete tool set for managing paragraph, character, page and document settings. Most important, FrameMaker includes the ability to 'import' formats from one document to another. This allows document-wide reformatting at the click of a button, even in multi-file documents.

In addition. FrameMaker has an excellent tool set for management of multiple-file books. The toolset provides control of page numbering stop and start, TOC generation and page numbering prefixes. In addition, all format import options can be applied to an entire book.

Finally FrameMaker includes powerful conditional text, text flow, hypertext and cross-referencing features.

These features, and others, make FrameMaker ideally suited to:

- Documents longer than 15 pages.
- Multiple-file documents.
- Documents with complex layout and formatting requirements, such as newsletters.
- Single-source publication: Generation of on-line and hardcopy documents from a single source document.

FrameMaker is **not** suited to short documents, such as brief memoranda or one-page letters. It enforces a rigorous set of rules for style and content management that, while beneficial in long, complex projects, add unnecessary overhead to shorter documents.

Acrobat

Adobe Acrobat is a flexible solution for cross-platform distribution of electronic documents. With built-in hypertext, compression and forms capabilities, Acrobat is an excellent solution for 'print on demand' or on-line materials.

In addition, Acrobat is tightly integrated with FrameMaker and Acrobat work together to automatically generate or convert the following hypertext features when generating the Acrobat file:

- Bookmarks.
- Hyperlinked table of contents and index entries.

- Hyperlinked cross references.
- Most FrameMaker hypertext features.

Acrobat exactly preserves page formatting and fonts from the original document. This makes it well-suited to distribution of print-on-demand documents, either from the WWW or CD-ROM.

Generating Acrobat documents is a simple, one or two step process. The Acrobat product suite also includes tools for indexing large document collections, scanning and converting documents to Acrobat format, and converting PostScript files directly to Acrobat format.

Consider Adobe Acrobat where:

- You are using Adobe FrameMaker: Acrobat is always worth consideration when FrameMaker is the selected content development tool, because of the level of integration between the two products.
- You must distribute many different documents to multiple platforms: Acrobat's ease of use and cross-platform compatibility make it an ideal solution for large collections.
- You are creating print-on-demand documentation: Acrobat is ideally suited to creation of print-on-demand materials, because it preserves formatting.
- You are distributing materials designed for print on the WWW: Acrobat's compression features, combined with its ability to preserve page layout, make it an excellent tool for web distribution.
- You need a searchable document collection: Acrobat Catalog, included in the Acrobat product suite, allows you to build a searchable collection of PDFs for search and retrieval from a CD-ROM or LAN.

Acrobat is **not** a good solution for systems where fonts and page layouts must be dynamic. For example, if you want your users to be able to set their font size to 'large' or 'small', you will need to use a proprietary help system, such as Windows Help, or HTML.

REQUIREMENTS FOR SUCCESSFUL IMPLEMENTATION

A successful implementation requires, at its root, that the responsible parties understand the two products. It is equally important the responsible parties understand the context in which the implementation will take place. Finally, the responsible parties must have a developed plan for training and supporting new users of FrameMaker and Acrobat.

Product Expertise

Product knowledge is obviously essential to a successful FrameMaker or Acrobat implementation. Both products are complex, and can be optimized to individual documentation contexts. A smooth implementation requires that the responsible parties understand potential problems and integration issues.

Most important, a smooth implementation requires that the responsible parties are able to provide continuing support and training for staff as they use move to the new software. Without training and support, new users cannot learn how to best take advantage of FrameMaker or Acrobat.

Context

The responsible parties must understand the context into which FrameMaker and Acrobat will be introduced. At a minimum, they must understand:

*   Client document workflow.
*   Client goals in implementing FrameMaker or Acrobat.
*   Content development, including graphic design and writing.
*   Production, including hardcopy publication and on-line distribution.
*   Web technologies and the implications of distributing documents on-line.

The larger context influences how a documentation group applies FrameMaker and Acrobat to their development and publication process. Understanding this context and the technologies which must be integrated with FrameMaker and Acrobat insure a successful implementation of either product.

Training and Support

Finally, no FrameMaker or Acrobat implementation can succeed without training and continuing support of new users. Current documentation thoroughly explores the features of the products. However, it is not sufficient for new users for several reasons:

*   User documentation does not discuss the best *methods* for applying the tools — manuals typically provide *procedures*, instead.
*   Different users have different learning styles — most are not comfortable learning new software products from user manuals.
*   User documentation is ideally suited to use as a reference guide by novice users, rather than as a training guide for new users.
*   The documentation may not discuss shortcuts, or how to best use a set of tools to obtain a specific result.
*   User manuals are necessarily *context-neutral* — they cannot deal with the specific issues of a specific documentation team.

Initial training should provide users with a clear picture of what each product can do. Users need not learn every detail of a product — if they know that the product can accomplish a given task, and can refer to a manual or contact support staff to fill in any gaps in their knowledge, they can rapidly become effect users.

After training, continuing support is essential — training sessions tend to be dense and fast-paced. As the user works with the product over the following weeks, new questions are bound to arise. Continuing support guarantees answers to these questions.

THE WRITTEN WORD, INC.

The Written Word, Inc. offers complete FrameMaker and Acrobat implementation solutions, from initial training to continuing support and consulting services. We are an information design firm whose staff is experienced in all aspects of content development and delivery.

Our Approach

The Written Word provides start-to-finish implementation support, including:

- **Needs assessment:** We meet with staff at a client to determine current and intended document workflow, and perceived shortcomings/advantages of current tools and methods. At this stage, we determine whether Acrobat or FrameMaker will provide a good return on investment, and whether integration with third party tools, such as Allaire's Cold Fusion, might add value. Finally, we use the needs assessment to plan training and ongoing support. We make our recommendations based on this needs assessment.
- **Training:** We deliver on-site training in two or three day sessions for Adobe FrameMaker, and one or two day sessions for Adobe Acrobat. All training is tailored to the specific requirements of the client, as determined in the needs assessment.
- **Consulting and support services:** We provide continuing support after training, as well as full consulting services for FrameMaker and Acrobat implementation. Consulting services might include workflow design, recommendations for integrated web publishing and forms solutions, or archival system design.
- **Document production and conversion:** Finally, the Written Word, Inc. provides complete production and conversion services. FrameMaker and Acrobat implementation typically entails an initial 'burst' of document reformatting, as existing manuals and other materials must be converted to the new standard. We can help you handle the large initial workload and use the conversion/production projects as an opportunity to ensure transfer of knowledge to your staff.

Product Expertise

Ian Lurie, our FrameMaker and Acrobat trainer and consultant, is an Adobe Certified Expert in Adobe FrameMaker 5.5*x*. He has used Adobe Acrobat to distribute documents on-line and on the World Wide Web for over four years. See the attached CV for a list of training clients and other projects.

He is supported by a staff of designers and content developers who ensure that training and implementation solutions focus on the needs and goals of the client.

Training and Support

Our FrameMaker and Acrobat training programs are based on Adobe's proven Classroom in a Book curriculum. However, we have reorganized the curriculum to include lessons learned in day-to-day use, plus methods and systems to make the best use of Adobe's tools. See the attached course outlines for sample curriculum.

In addition, we have reorganized the Adobe curriculum to match the task orientation of most documentation groups. This allows for a logical progression from topic to topic, even when training is spread over several weeks.

We understand that FrameMaker and Acrobat are complex tools that cannot be learned in three days: We are available for as-needed phone and email support, as well as follow-up visits and training, if required.

Context

The Written Word, Inc. is not purely a Adobe consulting firm — we also provide web design and database integration services, as well as technical content development.

From document creation to Cold Fusion database integration, we are aware of the practical issues faced by document and information management departments — we provide honest recommendations and training designed with the larger picture in mind.

COMPLETE SOLUTIONS

The Written Word, Inc. applies top industry talent to create comprehensive Adobe Acrobat and FrameMaker solutions for web, on-line and paper publications.

Our staff have expertise in Adobe Acrobat and FrameMaker, as well as web site design, multimedia development, web database integration, training development and technical documentation. We also draw on key partners with expertise in Visual Basic programming, database development, CGI and high-speed scanning and document conversion to ensure adequate staffing for projects.

As active participants in the Puget Sound FrameMaker Users Group and the Society for Technical Communications, we work to remain abreast of developments in the tools and methods we implement, and to contribute to their continued development.

Contact The Written Word, Inc. today, to find out what we can do for you.

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The Written Word, Inc.
Course syllabus for Adobe Acrobat 3.0

1) Introduction To Exchange 3.0
   a) *About Adobe Acrobat*
   b) *Publishing PDF Documents*
   c) *Opening the work file*
   d) *Looking at the work area*
   e) *Navigating the document*
   f) *Following a link*
   g) *Retracing your viewing path*
   h) *Using bookmarks and thumbnails*
   i) *Watching a movie*
   j) *Looking at a note*
   k) *Searching for a word*
   l) *Filling out a form*

2) Navigating and Linking
   a) *About navigation*
   b) *Opening the work file*
   c) *About on-screen display*
   d) *Navigating the magazine*
   e) *Using and creating links*

3) Creating PDF documents
   a) *Creating PDF documents*
   b) *When to use PDF Writer/Distiller*
   c) *Some General Pointers*
   d) *Creating a PDF file with PDF Writer*
   e) *Opening the work file*
   f) *Using PDF Writer*
   g) *Viewing the PDF file*
   h) *Creating PDF with Distiller*
   i) *Viewing and comparing the PDF files*
   j) *Creating a PostScript file*
   k) *Creating a PDF file in two steps*
   l) *Distiller Assistant – the good and the bad*
   m) *Capturing a fax image file*
   n) *Correcting suspects*

4) Electronic Publishing with Acrobat
   a) *On-Screen versus print-on-demand*
   b) *What you'll need*
   c) *Publishing on the Web*
   d) *Design considerations*

5) Using and creating navigational structures
   a) *Using bookmarks*

b) Using thumbnails
c) Creating a cross-document link
d) Replacing a page
e) Using articles
f) Using links and bookmarks to play actions

6) Modifying PDF
a) Automatically generating links and bookmarks
b) Editing pages
c) Editing text

7) Souping it up
a) Using movie and sound files
b) Using page actions
c) Using movies
d) Using sounds

8) Creating forms
a) Working with forms online
b) Buttons
c) Adding form fields
d) Creating a Submit button
e) Creating a Reset button
f) Filling out fields
g) Using the Forms Update Plug-Ins
h) Forms examples

9) Using Exchange in the review cycle
a) Using notes
b) Setting file security
c) Tools: Re:Mark

10) Indexing with Catalog
a) Building an index
b) Searching an index
c) Using document info fields to search
d) Searching with Boolean expressions
e) Web searches and tools

11) Additional tools

12) Advanced Topics: Form Data Handling
a) Basic principles
b) FDF Definition
c) Importing and Exporting FDF
d) Connecting to a CGI script
e) Connecting using a third-party tool
f) When to use PDF data handling
g) When not to
h) Resources

The Written Word, Inc.
FrameMaker Training Course Syllabus

I. Session 1: FrameMaker Basics

A. *FrameMaker compared to other programs*
1. Compared to Word
2. Compared to Pagemaker

B. *When to use FrameMaker*
1. Large Documents
2. Format-Critical Documents
3. Material to put online (Adobe Acrobat and FrameViewer/FrameReader)

C. *How FrameMaker Works*
1. Layers:
2. FrameMaker automates tasks
3. Heeeeelp

D. *The FrameMaker Window*
1. Ruler
2. Formatting Bar
3. QuickAccess Bar
4. Status Bar
5. Zooming in and out
6. Showing and hiding text symbols, borders
7. Text Flows - how they work
8. Refreshing the screen

E. *Setting Preferences*
1. Automatic Backup and Save

F. *Making Your First Document*
1. Before you begin
2. Word Processing tasks -

G. *Other Tools and Tricks*
1. Page Layout Tricks

H. *Paragraph and Character formatting*
1. Assigning a predefined character
2. When to use which
3. Why use formats?

I. *Page Formatting*
1. Right/Left
2. Rotation - just for fun
3. Assigning a Master Page
4. Headers and footers

J. *Using Tables*
1. Inserting a table.
2. Filling in a table

3. Adding rows and columns
4. Rearranging information
5. Formatting text in table cells
6. Resizing columns
7. Straddling table cells
8. Sorting columns and rows
9. Rotating cells and tables
10. Controlling page breaks in your table
11. Positioning text in a cell
12. Ruling and Shading
13. Controlling where a table appears on the page:
14. Saving a table format you like
15. Redefining a table format so that you like it
16. Deleting a table format you don't like
17. Applying reformatting to more than one table type: Global Update Options

K. *Graphics and Anchored Frames*
1. Adobe FrameMaker graphics tools -- why not to use them
2. Importing a graphic – your first anchored frame - insert graphic pic1.tif - for more practice, as WS to table on next page.
3. Where is that frame anchored, anyway? - click view > text symbols if you haven't already
4. Anchoring graphics in the column
5. Anchoring graphics in the margin
6. Anchoring graphics inline
7. Creating a run-in graphic
8. Copying an anchored frame
9. Reusing anchored frames
10. Bonus: Creating a drop-cap

L. *Variables*
1. Why use them?
2. Inserting a Variable
3. User vs. System

M. *Cross References and Footnotes*
1. Inserting a paragraph cross reference
2. Displaying the source of a cross-reference
3. Inserting an external cross reference
4. Inserting a spot cross-reference
5. Resolving cross references
6. Inserting footnotes
7. Changing how footnotes look

N. *Indexes*
1. Inserting index entries
2. Generating an Index

II. Session 2: Books, Document Templates

A. Working With Book Files
1. Links - Don't break 'em, they'll break your heart
2. Storage procedures
3. Building a Book
4. Opening a document in a book file
5. Rearranging a Book
6. Formatting a Book
7. Generated Files
8. Printing a book

B. Working with Templates
1. What a template is
2. How to use one

C. Getting ready
1. Set up the rulers
2. Set up the grid, if you want to

D. Formatting Documents
1. Page numbering & number of pages
2. Smart quotes and spaces

E. Book files revisited: Advanced book file setup options
1. Page numbering, too: Prefixes and Suffixes

F. Formatting Pages
1. Formatting pages
2. Creating and changing master pages

G. Changing and Creating Paragraph and Character Formats
1. Formatting paragraphs
2. Using the Character Designer
3. A few rules to live by
4. What does that "Override Formats" box mean?
5. Deleting unused paragraph formats

H. Changing and Creating Tables
1. A few rules to live by
2. Using the Table Designer
3. Custom ruling & shading, a review

I. Changing and Creating Cross Reference formats
1. Creating a cross-reference format

J. Reference Pages
1. What they're for
2. How to use them
3. Formatting footnotes
4. Creating a reusable framed graphic
5. Table of Contents Layout

K. Changing and Creating Variables
L. Importing formats into individual files
1. Warnings
2. Procedure

M. Importing formats into book files

       1. Warnings
       2. Procedure
  N. *Documenting your template*
       1. Tools that are out there

III. Session 3: Advanced Topics and Review

  A. *Sending Frame Documents for output*
  B. *Conditional Text*
       1. Viewing
       2. Setting up
       3. Creating condition tags
       4. Adding conditional text
       5. Tagging text as you type
       6. Adding a conditional graphic
       7. Adding conditional table rows
       8. Tricks: Saving different versions using import by reference
  C. *Other types of imports - Text Insets*
       1. Tricks to make your import easier
  D. *Other types of markers*
  E. *More about hypertext markers*
       1. Creating a hypertext TOC and index
       2. Using cross-references as hypertext
       3. Testing hypertext
       4. Adding navigation buttons
  F. *Frame-to-Acrobat conversion*
  G. *Frame-to-HTML conversion*
  H. *Two templates, one document*
  I. *Review*