Essentials of FrameMaker

and other
Basic Authoring Skills

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Dedications

This manual is dedicated to every FrameMaker user who had to learn FrameMaker the hard way — without training — and to those who can learn a better way — with this manual.

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Preface

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I love FrameMaker. One of my favorite things to do with FrameMaker is to solve a previously unsolved problem. The fun part of this is learning something new about FrameMaker. Some might question my idea of fun but this is how I learned about FrameMaker, under pressure of a deadline and without formal training.

After I learned how to use FrameMaker, I wanted to know why things worked the way they did. I could only do so with an enquiring, patient mind, willing to make mistakes and learn from them. Everything I present in this manual comes out of that learning process. I hope you too will approach learning and using FrameMaker with an enquiring mind, willing to make mistakes and learn from them.

I designed this manual to teach a computer-literate person how to use FrameMaker at an everyday, fundamental level. Rather than teach how each tool is used, which requires users to integrate that information to get their work done, I show how to use all the tools in an integrated manner, *at a specific level*. This task-based, or usage-level-based concept was borne out of thousands of hours of training new users, setting up new FrameMaker installations, and troubleshooting existing FrameMaker installations. I realized that FrameMaker is almost exclusively used in a corporate environment, in which a template usually exists. Thus most users use the existing formats and do not create new formats, let alone entire templates.

I divided FrameMaker tasks into multiple levels of complexity, the most basic being this manual *Essentials of FrameMaker*, which is the most fundamental level of usage—writers using FrameMaker to produce documents with existing templates.

I hope you enjoy this manual. If you have any questions or problems, please contact me at: `fm101@meta-phrase.com`

Doug Martin

Overview

Each chapter in this manual is self-paced and can be done with or without a trainer.

When you have completed the exercises in the nine chapters of this manual, you will have created a book with a cover page, copyrights and disclaimers, table of contents (TOC), four chapters, and an index.

Intended Audience

Essentials of FrameMaker is the first volume in the Foundations of FrameMaker series. As its name implies, it provides an overview of the aspects and tools that are essential to using FrameMaker. *Essentials of FrameMaker* is intended for a new user coming into an established FrameMaker installation with pre-defined templates. The Template Administrator controls the formats in the templates and ensures that users do not modify any formats. This manual explains how to use predefined formats in their intended manner. Creating and modifying formats is taught in subsequent courses, such as FM 301: FrameMaker Template Creation and Administration (Basic and Intermediate Template Design Skills) and FM 551: *Big Docs Made Easy*.

Conventions

There are specific conventions used to present the information in this manual. This section outlines the formats and reasons for presenting the information using these conventions.

Exercise 1 Explanation of Information Presentation

An *Exercise* contains a series of steps to create the effect or to carry out the procedure discussed in the text above the Exercise or in a paragraph under the heading, just as this text is doing here.

1 The steps give specific instructions to be carried out.

2 If the step is complex, it is explained with general instructions here; detailed instructions are listed below the general instruction.

   a. This substep explains a complex step in smaller pieces.

   b. This means that if you read the main description of the action to be taken in the step above

   c. and then see similar text below in substeps, it does not mean to do it twice.

   d. The substeps simply give detailed instructions to someone who may not be familiar with the given action(s).

Order of Exercises

Throughout this book, the knowledge you glean from one chapter frequently is built on and expanded in subsequent chapters. In order to understand the information presented in this book, you may wish to complete the entire book before performing exercises out of order.

Dialog Box Differences

FrameMaker dialog boxes have different appearances for each of the three main operating systems. For this course, the primary differences are how the option selection states are displayed in dialog boxes and windows and how that state is noted in text.

Option Selection State	Macintosh	UNIX (Sun OpenWindows)	Windows
On	☑ **Strikethrough**	☐ **Strikethrough**	☑ S̲trikethrough
As Is	⊟ **Strikethrough**	☐ **Strikethrough**	☑ S̲trikethrough
Off	☐ **Strikethrough**	☐ **Strikethrough**	☐ S̲trikethrough

Some options have only two states; when text refers to an option's selection state, On will be noted as check (select) and Off will be noted as uncheck (deselect).

Pathnames and File Storage Locations

We use the UNIX syntax to list pathnames (such as `/work/fm101` rather than `C:\work\fm101`). Since two of the three main operating systems, the three main markup languages (SGML, HTML, and XML), and the internet use this syntax, we also use it here.

In this book, we use the UNIX term `directory` rather than the Windows and Macintosh term `folder` to denote storage locations on your hard drive.

Some resources are located in the FrameMaker installation directory; since the location of this directory varies depending on the platform, we use the generalization of `../<FrameMaker-install-dir>/` to point to one of three locations:

Platform	Pathname
Mac	<hard-drive>:Applications:Adobe:FrameMaker
UNIX	$FMHOME/fminit/<langdir>/
Windows	C:\Program Files\Adobe\FrameMaker

Thus, to refer to the ClipArt directory in the FrameMaker installation directory, we use this notation: `..<FrameMaker-install-dir>/clipart`.

Formatting Conventions

This book contains many exercises that require the reader to enter or understand information. To make clear what is required of the reader at a given point, various formats are used and are explained in the following table:

Format	Meaning	Example
Action	Emphasizes an action to be performed by the reader or the most important part of the step	**Paste** the marker
Bold	Indicates text that was previously entered and now must be altered. This makes it easier for readers to locate the parts to be changed	(changed text is shown in **Bold**): <$**start**range>Michael Faraday[Faraday]
Button	Emphasizes a button to be clicked	Click **Change**
`code`	Indicates a code fragment such as a building block	Insert the `<$chapnum>` building block
`Entry`	Indicates text to be selected or typed	Type: `Header/FooterLine`
`Filename`	Identifies a filename	Open `local-template.fm`
Format Name	Indicates the name of a format, paratag, chartag, tabletag, master page, or reference page	Assign the TitlePage4-2Line master page
Keyname	Emphasizes a key to be pressed	Press **Tab** twice
Menu	Emphasizes a specific menu selection	From the Graphics menu, select **Object Properties**
Option	Identifies an option in a dialog box to be selected	In the Show/Hide Conditional Text dialog box, select Show All
PopUp MenuItem	Identifies a selection in a pop-up menu	From the Commands pop-up menu, select New Format
Property	Identifies a property in a dialog box or designer	Go to the Bookmarks properties
`Shortcut`	Indicates a keyboard shortcut	Use the keyboard shortcut, `!ocl`
Toolname	Indicates a FrameMaker tool	Using Find/Change, find the text FigAbove

Keyboard Key Names Used

In this book, most keys are referred to by their common names, such as **Alt**, **Backspace**, **Command**, **Control**, **Delete**, **Meta**, **Option**, **Shift**, **Tab**

Other keys, such as Return or Enter are referred to by the UNIX term **Return**.

Keyboard Shortcut Notation Explanation

Many of the functions and tools of FrameMaker can be selected or controlled using keyboard shortcuts. Some of these keyboard shortcuts use the various specialized keys **Alt**, **Command**, **Control**, **Meta**, and **Option** and are different for each platform.

Some keyboard shortcuts can be used on all three platforms, Macintosh, UNIX, and Windows. These "cross-platform" keyboard shortcuts are triggered by a sequence of keys starting with the **Esc** key. Shorthand UNIX notation for the **Esc** is the exclamation point (**!**), commonly called "bang." The keyboard shortcuts mentioned in this manual that use the **Esc** key, are listed using this shorthand notation look like this:

```
!ocl
```

This means to press and release the **Esc** key, then press and release the following keys in succession: lower-case **O**, lower-case **C**, and lower-case **L**. By the way, pressing these keys opens the Column Layout dialog box.

Installing Applications, Files, and Directories

You will need to perform a complete installation of FrameMaker (which will install Acrobat Distiller) and Acrobat, or Acrobat Reader. If you are attending this class on-site or in a training center, this has been done for you.

Find a place in your computer system where you can store the (approximately) 5MB of files you'll be using while performing the exercises in this book.

Note: Use the exercise appropriate for your operating system. If you are attending this class on-site or in a training facility, skip this exercise. The following steps have already been done for you.

Exercise 2 Create Macintosh Working Directory

Note: You'll need StuffitExpander to uncompress the archive in this exercise. If you don't have StuffitExpander you'll have to download the uncompressed files.

1 Download the class files from `http://www.meta-phrase.com /` `downloads / download.html.` Click on `fm101` to go to the link and select your platform to download the appropriate archive.

2 Save the `fm101.sit` archive to a folder on your hard drive. This can be the desktop or your root directory.

3 Double-click the `fm101.sit` archive.
StuffitExpander will unstuff the archive to the folder and create the `fm101` directory. When you create documents or books, you will save them to the `../fm101/` directory.

4 You may delete the `fm101.sit` archive.

5 Each of the various chapter directories, such as `../fm101/ch3` or `../fm101/ch4`, contain all the files you will need to complete the exercises for the corresponding chapter. That is, `../fm101/ch3` contains the files needed to complete the exercises in Chapter 3, and `../fm101/ch4` contains the files needed to complete the exercises in Chapter 4. We recommend that you complete all the exercises in sequence at least once before completing chapters out of order.

6 Store an alias to `../fm101/e-templates` in the FrameMaker Templates directory, which is inside the FrameMaker installation directory. Create an alias of your `e-templates` directory, `../fm101/e-templates`, and move it to the FrameMaker Templates directory inside `../<FrameMaker-install-dir>/`.

(For more information about the location of the FrameMaker installation directory, see *Pathnames and File Storage Locations* on page ix.)

7 Confirm the installation of the alias to the `e-templates` directory.

   a. From within FrameMaker, from the File menu, select **New > Document**. The New Document dialog box FrameMaker should look like the following:

The `e-templates` alias has a special appearance in the Templates directory
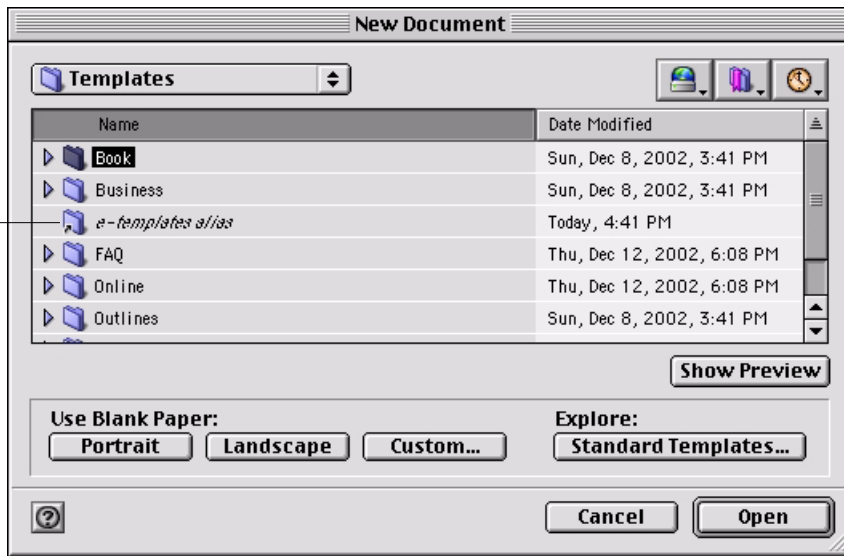
Exercise 3 **Create UNIX Working Directory**

Note: You'll need gzip to uncompress the archive in this exercise. If you don't have gzip you'll have to download the uncompressed files.

1 Download the class files from `http://www.meta-phrase.com /downloads / download.html`. Click on `fm101` to go to the link and select your platform to download the appropriate archive.

2 Save the `fm101.tar.gz` archive to a temporary directory.

3 Unzip the archive in the temporary directory using the following command:
    `gunzip -v fm101.tar.gz`
This will unzip the archive into the temporary directory and leave a tar file, `fm101.tar`

4 Extract the files using the following command:
    `tar -xvf fm101.tar`
This will install them into a directory named `/work/fm101`. You may then move the fm101 directory to a location of your choosing. This location will be noted throughout the remainder of this manual as `../fm101/`. When you create documents or books, you will save them to the `../fm101/` directory.

5 Each of the various chapter directories, such as `../fm101/ch3` or `../fm101/ch4`, contain all the files you will need to complete the exercises for the corresponding chapter. That is, `../fm101/ch3` contains the files needed to complete the exercises in Chapter 3, and `../fm101/ch4` contains the files needed to complete the exercises in Chapter 4. We recommend that you complete all the exercises in sequence at least once before completing chapters out of order.

6 Create a symbolic link from the `$FMHOME/fminit/<langdir>/Templates` directory to your e-templates directory, `../fm101/e-templates`. (The `<langdir>` is the directory for your platform language; for example, if you installed a US English version of FrameMaker, `<langdir>` would be `usenglish`.) This command should look like:
    `ln -s $FMHOME/fminit/<langdir>/Templates`
    `../fm101/e-templates`

7 Confirm the installation of the symbolic link to the `e-templates` directory.

   a. Start FrameMaker.

b. From the File menu, select **New > Document**.

The New dialog box
FrameMaker should look like
the following:
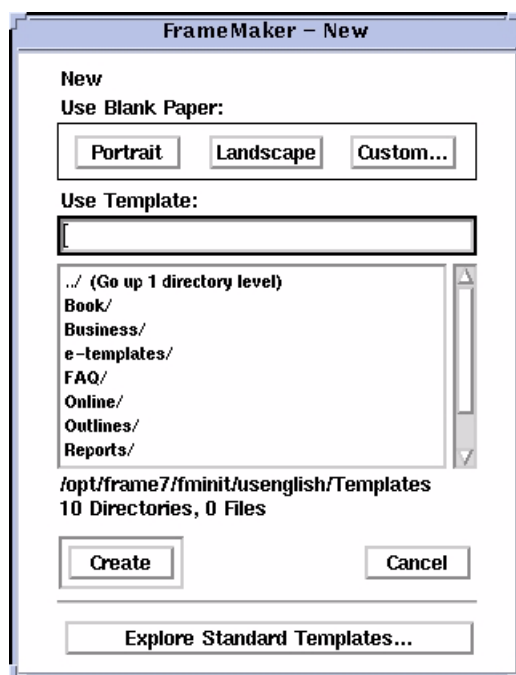
Exercise 4 Create Windows Working Directory

Note: You'll need WinZip to uncompress the archive in this exercise. If you don't have WinZip you'll have to download the uncompressed files.

1 Download the class files from `http://www.meta-phrase.com /downloads / download.html`. Click on `fm101` to go to the link and select your platform to download the appropriate archive.

2 Save the `fm101.zip` archive to a temporary directory.

3 Open the `fm101.zip` archive to extract the folders within the `fm101.zip` archive to `../fm101/`

a. Open the `fm101.zip` archive by double-clicking the `fm101.zip` file icon.

b. WinZip starts and displays the files in `fm101.zip`.

c. From the Actions menu, select **Extract**.

d. In the Extract To: box, specify the path to where you want to store the `fm101` folder. For example, to store it on the C: drive, enter: `C:\`
To store it in D:\downloads\work, enter `D:\downloads\work\`

For the rest of this manual, the directory you choose is referred to as `../fm101/`. When you create documents or books, you will save them to the `../fm101/` directory.

4 Unlock the files before using them. In the `../fm101/` directory, double-click
`unlock.bat`.
This will ensure that all the files are unlocked.

5 Each of the various chapter directories, such as `../fm101/ch3` or
`../fm101/ch4`, contain all the files you will need to complete the exercises
for the corresponding chapter. That is, `../fm101/ch3` contains the files
needed to complete the exercises in Chapter 3, and `../fm101/ch4` contains
the files needed to complete the exercises in Chapter 4. We recommend that
you complete all the exercises in sequence at least once before completing
chapters out of order.

6 Create a "shortcut" of your `e-templates` directory, `../fm101/e-
templates`. **Copy** it and **paste** it in the FrameMaker Templates directory
(typically, `C:\Program
Files\Adobe\FrameMaker 7.0\Templates`).

7 Confirm the installation of the shortcut to the `e-templates` directory.

   a. Start FrameMaker

   b. From the File menu, select **New > Document**.
The New dialog box FrameMaker should look like the following:
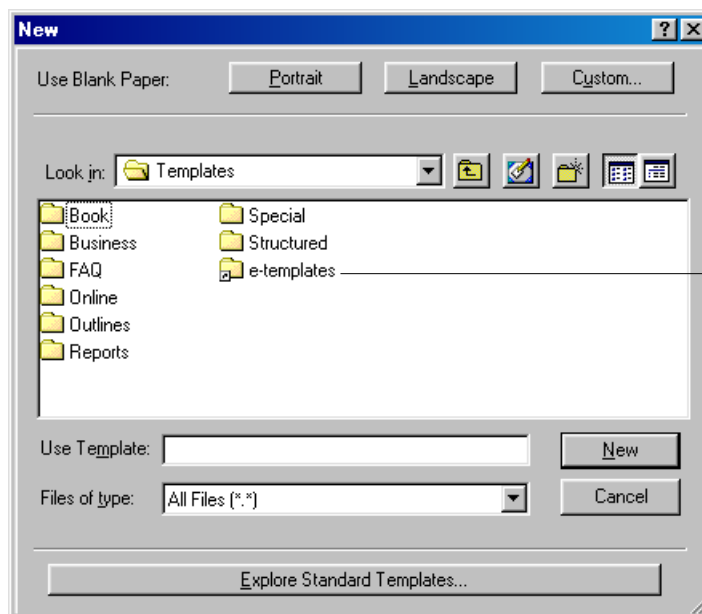
The `e-templates`
directory displays
as another folder in
the Templates
directory

1 Getting Started in FrameMaker 7

Introduction

FrameMaker is unlike word-processing or page layout applications because it was designed to create long, complex documents composed of multiple separate files; FrameMaker is a document processor.

Objectives

In this chapter you will:

- Compare FrameMaker to other applications
- Understand the FrameMaker approach to document processing
- Learn about Global Management of Styles and Formats
- Take a brief tour of the FrameMaker interface
- Learn the names and locations of FrameMaker's tools
- Set up application preferences and document viewing options

How FrameMaker Differs From Other Applications

FrameMaker is a document processing application that allows users to easily create and maintain long, complex documents. Other desktop publishing (DTP) applications appear to be similar to FrameMaker, but lack FrameMaker's sophisticated and integrated tools. For example, Microsoft Word© is a text processor and was designed to format short, simple documents, such as office correspondence or white papers. Adobe PageMaker© is a page-layout tool, suitable for creating four-color brochures, catalogs, and newsletters, where absolute control over individual page layout is paramount.

The following table outlines some of the differences between FrameMaker and other DTP applications used to create long manuals.

FrameMaker tool	Compared to similar MS Word tool	Compared to similar PageMaker tool
Paragraph Formatting	**Styles**	**Styles**
Paragraph Formats are completely customizable. Major difference is autonumbering: absolute control of when numbers increment and when numbers are reset. Also, graphics can be part of a Paragraph Format.	Pre-set autonumbering styles Not easily controlled; autonumbering can be unreliable. No global control of paragraph formats across documents.	Has good typographic controls. Pre-set autonumbering styles are not easily controlled; autonumbering can be unreliable. No global control of paragraph formats across documents.
Character Formatting	**Styles**	**No matching tool**
Character Formats allow global control of individual character formatting using Character Tags.	Styles in Word are similar to Character Formats, but only within a document. No global control of characters across documents.	Cannot globally control character formatting.
Color		
Can create custom colors for 4/c work and use predefined Pantone, Toyo, Trumatch, and other industry-standard color libraries.	No color libraries.	Can create custom colors for 4/c work and use predefined Pantone, Toyo, Trumatch, and other industry-standard color libraries.
Table of Contents		
Define TOC content by Paragraph Formats; TOC created from within book of multiple files or for individual document. The resulting TOC is a separate document.	Define TOC by style or by specialized tagging. TOC created for individual files or for master document.	Must select paragraph to be in TOC in paragraph specification box.
Long Document Creation		
Long document creation is effortless. FM designed to handle multiple files to create one logical document. Multiple files can be effortlessly moved around within the Book window.	Word designed to handle single documents. Can use master document to organize logically related files, but interface is clumsy.	Long document creation difficult.

(Sheet 1 of 3)

FrameMaker tool	Compared to similar MS Word tool	Compared to similar PageMaker tool
Index Entries		
Index entries can be formatted with any character format, can have any number of levels. Completely customizable.	Index entries must be marked with special code. Limited to two levels with pre-defined formatting.	Index entries limited to specific formats and only three levels.
Index Formatting		
Index formatting controlled in the Index file and is user-defined; no limits to complexity of formatting and all formats can be changed in one place.	Entries are limited to pre-defined formats. Formatting of indexes limited to predefined formats.	Indexes are generated for each file.
Generated File Types		
FM has thirteen different generated file types, including standard TOC and IX. All generated file information stored on Reference Pages for easy global control of formatting.	Word has four standard generated files: Index, TOC, List of Figures, List of Authorities.	PM has only TOC and Index.
Cross-References		
FrameMaker allows unlimited user-defined formats; can be arbitrarily complex. Can cross-reference to any other FM document that is open on desktop.	Limited cross-referencing ability. Source type limited to pre-selected paragraph styles. Content and format are limited. Cannot cross-reference another document.	Cross-referencing limited to entries in index.
Tables		
Table formats can be created and applied to any table. Unlimited number of table formats; precisely control position, size, row height, ruling, etc. Paragraph styles, defined and controlled from one place are used within tables, and allow global control of text appearance within table cells.	Limited number of pre-defined table formats. No global control of tables styles.	PM uses stand-alone table editor; tables are created in Adobe Table and imported into PM. No global control of tables styles. Formatting within table cells limited to typographic controls; bold, italic, caps, indents, alignment.

(Sheet 2 of 3)

FrameMaker tool	Compared to similar MS Word tool	Compared to similar PageMaker tool
Variables		
Variables define and control appearance of text strings in one place. Use in many places; when changed, each point of usage is automatically changed as well.	No comparable tool (Autotext feature allows creation of a Variable-like string, but cannot update previously inserted instances when Autotext string is modified).	No comparable tool in PM.
Master Pages		
Master Pages globally control appearance of document layout.	No comparable tool. Each page laid out separately.	Master Pages globally control appearance of document layout.
Editing Structured Documents (SGML and XML)		
Can create DTDs and SGML/XML instances from structured documents.	Custom application required to edit XML. Need separate application to create DTD.	No comparable tool.

(Sheet 3 of 3)

FrameMaker's tools easily manage separate physical files that comprise one logical file. Most importantly, formats can be administered across all the documents that comprise the logical file. This management of formats can be extended to allow global management of an arbitrary range of documents and document sets.

Global Management of Formats

Global management of formats is crucial to produce documentation with a uniform appearance. Document sets that have a uniform appearance reflect a well-organized and attentive-to-detail enterprise.

How formats are globally managed in FrameMaker

Your organization might produce many different "types" of documents, such as white papers, employee training manuals, product specification manuals, field service manuals, user guides, workflow or process manuals, user training materials, reference manuals, technical manuals, and others.

To create a specific "type" of document, you would use a FrameMaker template that was created to produce that "type" of document. For example, your organization might create two software user manuals, a user guide and a technical reference manual. The user guide might have different formatting requirements than the technical reference manual. Therefore, you would create two templates, one for the user guide and another for the technical reference manual.

Each of these templates may comprise several FrameMaker files stored in a book. The templates will contain specific layouts and definitions of the formats available in FrameMaker. The documents produced from those templates also will be stored in FrameMaker books.

Most documents are revised periodically over a lifespan of many months or years. These documents are often referred to as "living documents."

The big issue with living documents is how to maintain the formats across all the documents that are the same type, such as the user guide or technical reference manual. To manage the formats for all the documents that are the same type, you create another specialized type of template, generally called a Master Template. The Master Template controls not only the documents created from the template, but the template itself.

When the formats need to be revised, rather than revise them in each document file, you revise them in one place, the Master Template. Then import the formats from the Master Template into another specialized document called a Local Template. The Local Template controls the formats and variable definitions that are used within a specific FrameMaker book. This hierarchy can be represented with a tree diagram, as shown below:
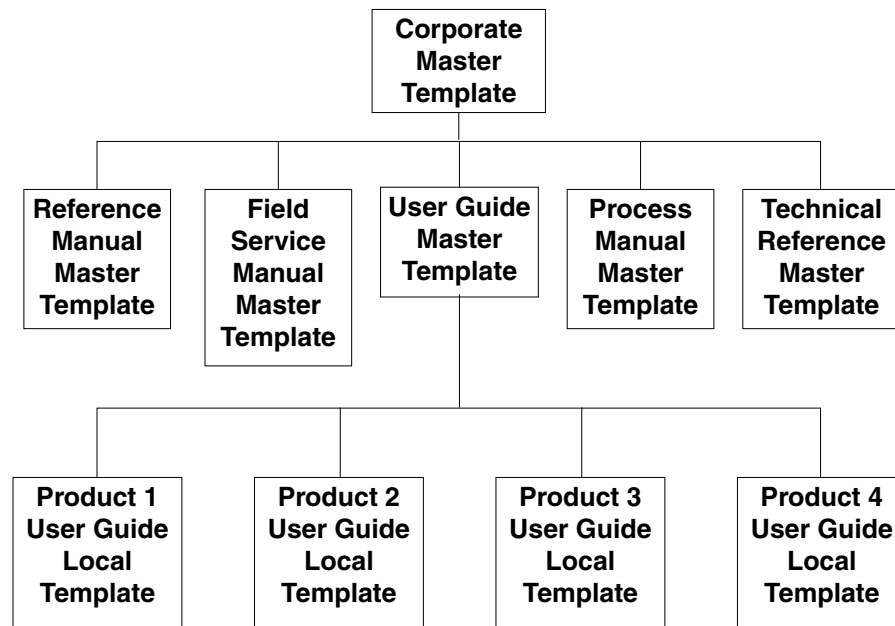
One problem with global management of formats is that FrameMaker also allows users to modify formats within individual documents.

The crux of global management of formats is using only the formats created in and controlled by the Master Template. If a format is introduced in a document that is not stored in the Master Template, the style cannot be globally managed. Documents created using these non-standard formats look different from the template.

Other Format Issues

Assuming your organization has templates, the people responsible for those templates (generally referred to as Template Administrators) don't want users to modify the templates because this would allow non-uniform documents to be created. Other issues, such as conversion to HTML or Structured FrameMaker documents present other reasons to avoid user modification of templates or introduction of non-standard formats within a document.

To convert to HTML, WebWorks Publisher uses the format name to map the content to a specific appearance (HTML tag) in HTML. If the format name is not in the conversion list, the result will not look correct.

To convert unstructured FrameMaker files to structured FrameMaker, you map unstructured formats to element names. If the format name is not in the conversion table, the document will not convert correctly.

A Tour of FrameMaker

In the following exercises, you will look through a FrameMaker document, a FrameMaker book, and become more familiar with FrameMaker's tools.

Exercise 5 **Starting FrameMaker**

1 Start the FrameMaker application using the method appropriate for your platform.

Macintosh	In the Finder, open **Applications (MacOS9) > Adobe > FrameMaker 7.0 > FrameMaker 7.0**
UNIX	In a command shell, execute `$FMHOME/bin/maker &`
Windows	From the **Start** menu, select **Programs > Adobe > FrameMaker 7.0 > FrameMaker 7.0**

When you launch FrameMaker for the first time, FrameMaker prompts you to choose either the standard FrameMaker interface or the Structured FrameMaker interface.

2 If you are presented with a choice, click **FrameMaker**. When FrameMaker starts, skip to Exercise 6 on page 9.
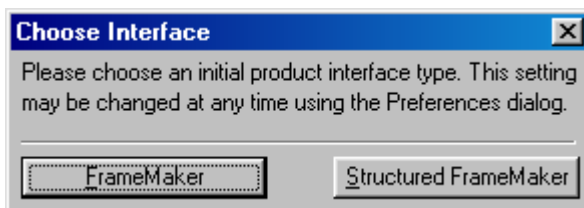
3 If you are not presented with a choice and the FrameMaker menu bar (UNIX: the main window) indicates you have the standard interface, as shown below, skip to Exercise 6 on page 9:

File Edit **Format View Special Graphics** Table Window **Scripts Help**   Macintosh

FrameMaker
▽
NEW | OPEN | HELP | INFO | EXIT   UNIX main window

Adobe FrameMaker
File Edit Format View Special Graphics Table Window Help   Windows
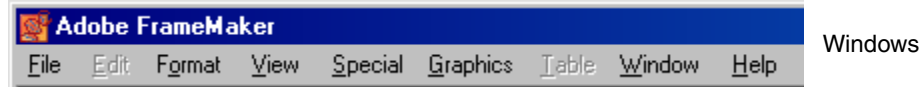
4 If you are not presented with a choice and the FrameMaker menu bar indicates you have the Structured interface, as shown below, do the following:

File Edit **Element Format View Special Graphics** Table Window **Scripts Help**

The added menu item "Element" indicates the Structured
FrameMaker interface for Macintosh

FrameMaker (Structured)
▽
NEW | OPEN | HELP | INFO | EXIT   Structured Interface indicator
in UNIX main window
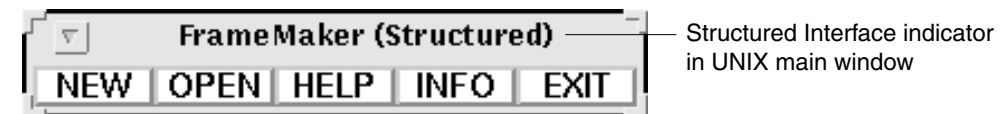
Structured Interface in Windows title bar

Adobe FrameMaker (Structured)
File Edit Element Format View Special Graphics Table Window Help
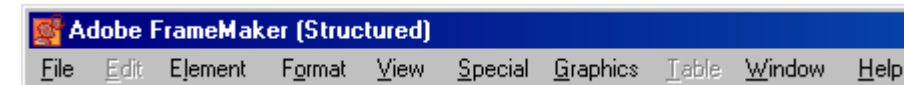
a. From the File menu select **Preferences**. For Macintosh and Windows, pull right to **General**.

The Preferences dialog box displays.

b. From the **Product Interface** pop-up menu, select FrameMaker.

Preferences

User Preferences:

☑ Automatic Backup on Save
☑ Automatic Save - Every: 10 Minutes
☐ Show File Translation Errors
Greek Screen Text Smaller Than: 7.0 pt
Monitor Size: 22"

Compatibility Preferences:

Cross-Platform File Naming: UNIX
☐ Save FrameImage with Imported Graphics
☑ Network File Locking
☐ Remember Missing Font Names

Asian Language Features: Information

Product Interface: FrameMaker
  FrameMaker
  Structured FrameMaker

Set

c. Click **Set**.

d. FrameMaker prompts you to quit and restart FrameMaker to use the new interface choice.

Please quit and restart FrameMaker for the new interface to take effect.

OK
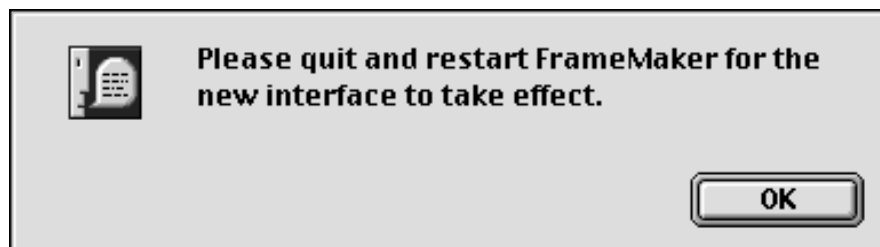
e. Exit FrameMaker. From the File menu, select **Exit**. (UNIX: in the main FrameMaker window, click **Exit**.)

f. Restart FrameMaker.

Exercise 6 **FrameMaker Tools and Setup Suggestions**

In this exercise, you'll learn about some of the FrameMaker window tools and some setup suggestions.

1 From the File menu, select **Open** (UNIX: in the Main window, click **Open**).

2 In the Open dialog box, select `../fm101/ch1/sg.using-formats.fm` and click **Open**. (In Macintosh, select Show All Files to display the files.)

The document displays, as shown in the example below.

The Paragraph Catalog button displays a scroll list of the paragraph formats used to format entire paragraphs.	The Character Catalog button displays a scroll list of the character formats used to format characters within a paragraph.
The Graphic Tools Palette button displays drawing tools and graphics properties.	The Equations Palette button displays the Equation editor, used to create and modify equations.
The Status Bar contains information about the text at the insertion point, including, flow tag, paragraph format, character format, and conditional text setting. An asterisk displays if the format contains an override.	The Page Status area displays the current page number and total page count for the document. An asterisk indicates unsaved changes in the document.
The Zoom Controls set the viewing magnification of the document.	The Page Buttons display the previous page or next page of the document.

3 From the View menu, select **Borders**.

The document displays with non-printing rectangles around text frames and graphic objects.

Text Frame borders

Main Text Frame
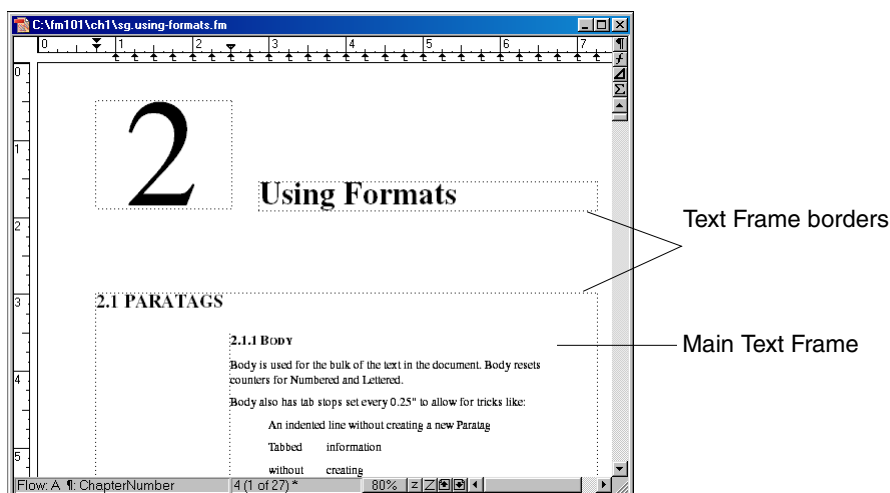
Turning on the borders will show you where you can enter text, where to place graphics, and the boundaries for table cells. Initially, the page may appear to be more cluttered, but once you get used to it, your mind will filter out that information. If you need to see how the printed page will look, turn off the borders.

4 From the View menu, select **Text Symbols**.

The document displays with non-printing text symbols.
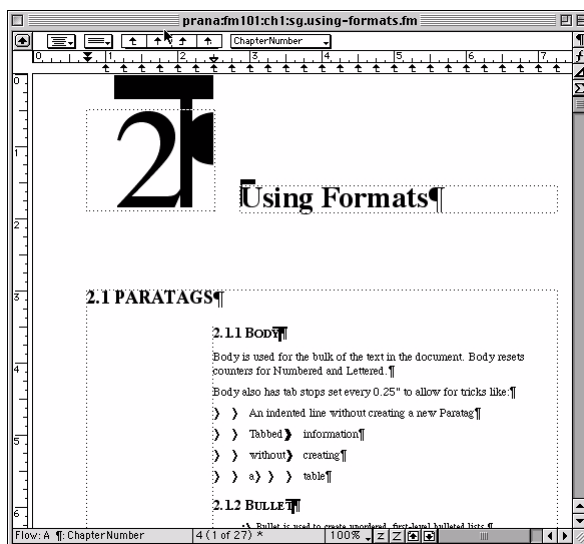
At first you may wonder what are all those things on the page and why do you need them? We encourage you to turn on Text Symbols to get used to seeing these symbols and to allow your mind to filter out that information until it is needed. These symbols help you see where you have tabs, ends-of-paragraphs, ends-of-flows, and forced returns, all of which commonly appear in documents. These symbols take on greater importance with Markers, Suppress

Hyphenation symbols, Anchored Frame anchors, and table anchors. The symbols take on crucial importance when you use Conditional Text in your documents. When you switch between views of a document, the Conditional Markers tell you that you have some conditional text hidden from view. If you turn off the symbols and delete text, you could inadvertently delete some conditional text!

Text Symbol	Description
⊥	Anchored frame or table anchor
⊤	Discretionary Hyphen
§	End of flow
¶	End of paragraph
❬	Forced line return
T	Marker
▬	Suppress Hypenation
〉	Tab

5 From the View menu, select **Rulers**.

The document displays without the document rulers.
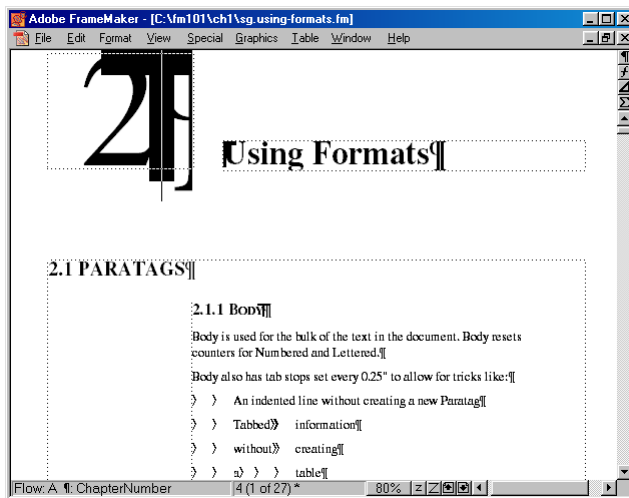
Rulers can help you lay out text frames and graphics on Master Pages, which control the overall appearance of a page. When you are not laying out master pages, rulers occupy precious screen space without contributing anything. Turn off rulers when you open a document to have more room to view your work. When you need the rulers, simply turn them on. Turn them off when you are finished.

6 Use the Zoom Controls to zoom the document to a comfortable setting.

Zoom Out (one level)   Zoom In (one level)
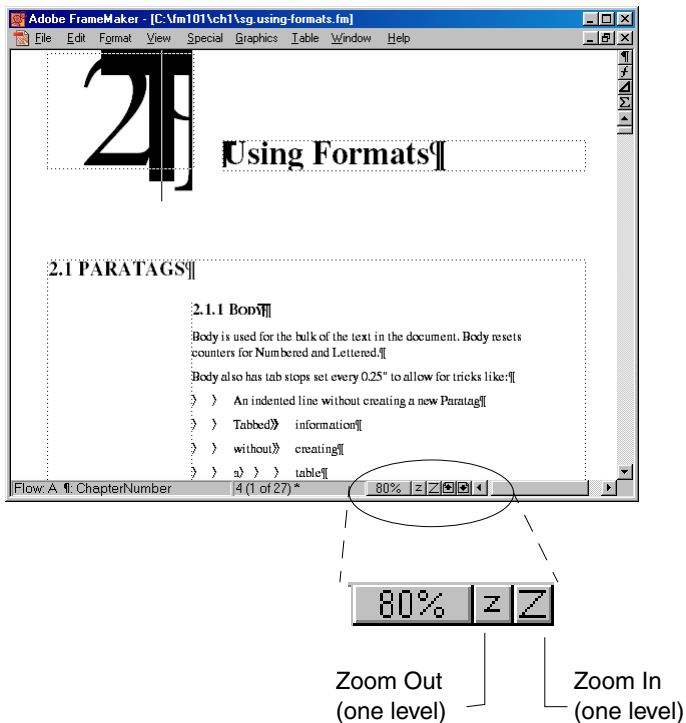
To Zoom In one setting, click the uppercase **Z**. Zoom in to a comfortable setting, such as 100% or 120%. To zoom out one setting, click the lowercase **z**. When you view documents at the same zoom level, you can correlate the on-screen dimensions to the actual on-paper measurements more easily.

7 You can also zoom to a specific level; click the **100%** button.
The Zoom pop-up menu displays.
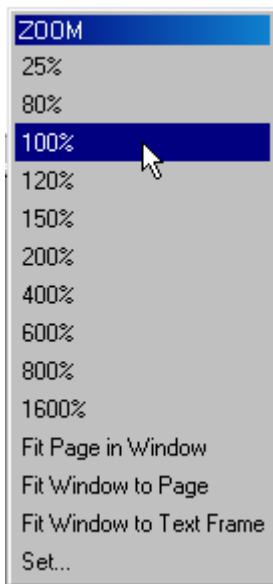
From this menu, you can select any of the preset zoom levels.

8 To specify preset zoom levels, click Set.

The Zoom Menu Options dialog box displays.
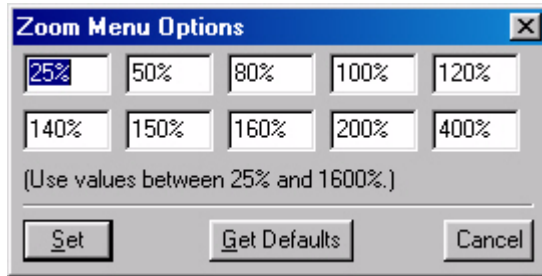
In this dialog box, you may specify any zoom level from 25% to 1600%.

The zoom level you choose depends on your screen resolution, monitor size, and platform.

9 When you have finished setting your zoom options, click **Set**. (If you didn't change any of the settings, click **Cancel**.)

10 From the Zoom pop-up menu, select Fit Window to Page.

This resizes the document window to the page size at the current zoom setting. The advantage of this setting is when you Page Down through a document, you will see the entire page. If you have a small monitor or your monitor is set to a low resolution, you may not be able to use this setting.
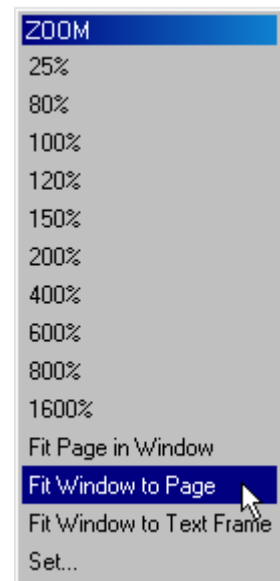
11 For Windows users: resize the application window to display as much of the first page of the document as your monitor will allow.

After you have gained some familiarity with the application window later in this book you will arrange your desktop for maximum efficiency.

The last things we recommend users do is turn off FrameMaker's toolbars.

12 On the View menu, see if there is a check mark next to **QuickAccess Bar**. If so, do nothing. If not, select **QuickAccess Bar**. Also on the View menu, see if there is a check mark next to **Formatting Bar**. In so, do nothing. If not, select **Formatting Bar**.
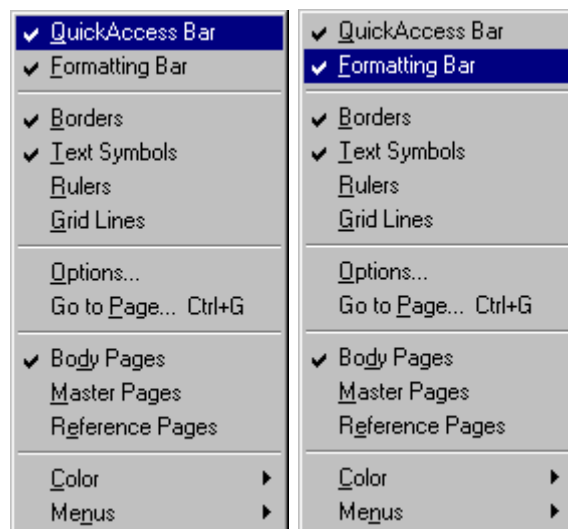
The toolbars display.

These two bars contain buttons that allow you to access many of FrameMaker's tools. However, these toolbars also allow you to create format overrides (see *Understanding Format Overrides* on page 62); format overrides can create large headaches later on and are best avoided. Also, these bars take up space that could be used for document viewing. All of the tools on these bars can be called up with keyboard shortcuts or by clicking and dragging from the menu.

13 For now, turn off the QuickAccess Bar and Formatting Bar.

   a. From the View menu, select **QuickAccess Bar**.

   b. From the View menu, select **Formatting Bar**.

Exercise 7 Viewing a FrameMaker Document

In this exercise, you'll page through a FrameMaker document and learn more about the tools you'll use every day.

When you first open a document, FrameMaker displays the first page, with your insertion point at the beginning of the file.

1 Look in the lower left-hand corner of the document window, at the status bar.
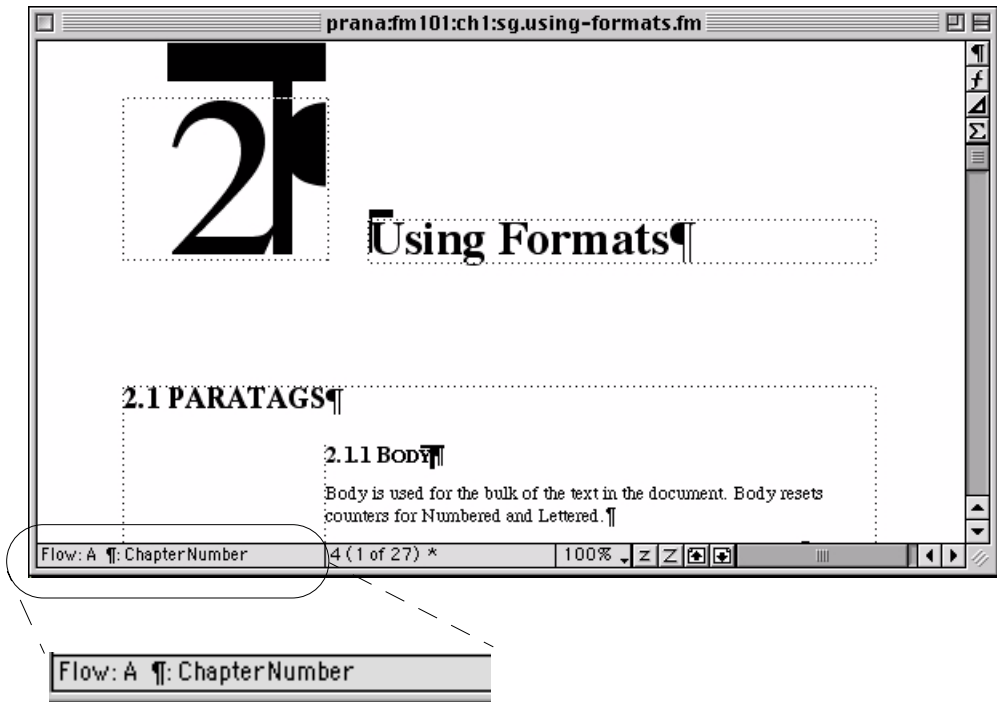
The status bar indicates the following information:

`Flow: A`	Flow Tag name	Identifies linked blocks of text (text frames) on separate pages or on the same page
`¶: Chapter Number`	Paragraph Format	Identifies the name of the format for the paragraph

As you become more familiar with FrameMaker, you'll use the status bar to obtain information about objects in the document and formatting information of the text at the insertion point.

2 Go to page 12 in `sg.using-formats.fm` using one of the following methods.

• From the View menu, select **Go To Page**.

- Click the **Page Status** area, as shown below:

Page Status area
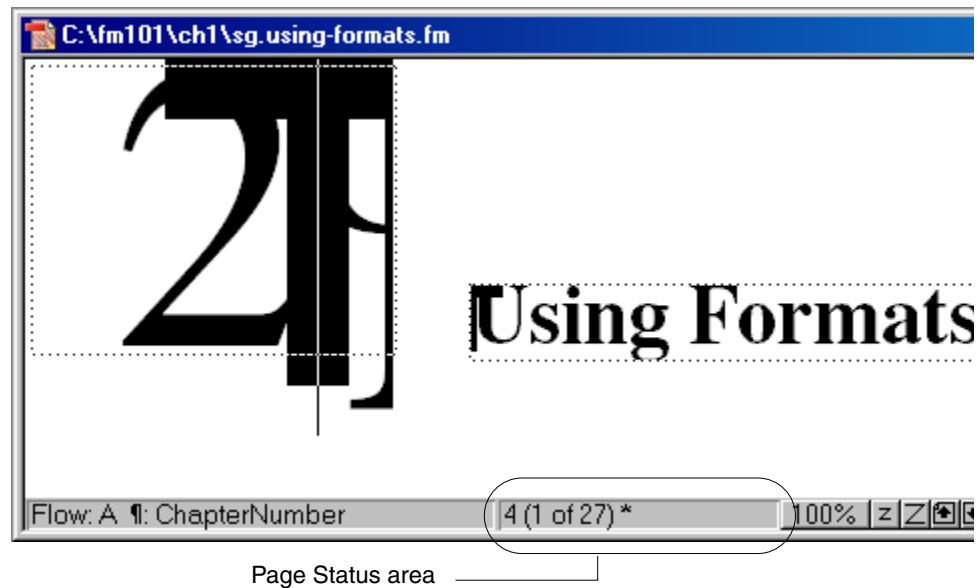
- Use the keyboard shortcut `Control-g`.

  The Go To Page dialog box displays.
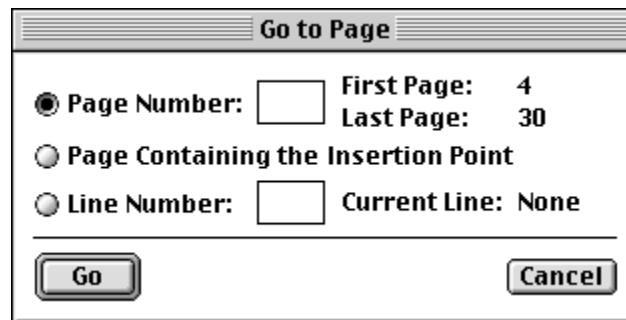
a. In the Page Number box, enter: `12`

b. Click **Go** or press **Return**.

  Page 12 of the document is displayed.

3 In the fifth paragraph down from the top of the page, put your insertion point in the word Bold, as shown below:

  This is an example of **Bold**.¶

  insertion point⌐

4 Look in the status bar; an example is shown below:
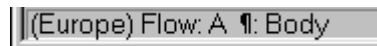
  The status bar indicates flow tag A, that the current paragraph is formatted with the Body Paragraph Format, and the text at the insertion point is formatted with the Character Format of Bold.

In FrameMaker, it is important to use only the Paragraph Formats and Character Formats that are defined in the template. To make some text bold and other text italic, rather than apply a hard-coded format, which cannot be globally managed, use a Character Format, which can be globally modified. You'll learn more about this in Chapter 3 Formatting and Editing Text on page 61.

5 From the File menu, select **Open**.

The Open dialog box displays.

6 In the Open dialog box, double-click `../fm101/ch1/sg.standard-solutions.fm`.

7 Depending on your platform, the document window may be too small to view text. Zoom the document to 100% or 120% by selecting the zoom level from the Zoom pop-up menu. Also from the Zoom pop-up menu, select Fit Window to Page.

8 Turn on Borders and Text Symbols. From the View menu, select **Borders**. From the View menu, select **Text Symbols**.

9 In the middle of the page, put your insertion point in the red overbar text MetaPhase, as shown below:

Condtags (USCAN, Asia, and Europe) applied to it. ¶

Our newest product MetaPhaseFazeLogicCompuFaze is now available through software retailers in EuropeAsiaNorthAmerica.¶

insertion point

10 Look in the status bar; an example is shown below:

(Europe) Flow: A ¶: Body

The status bar indicates that the text at the insertion point is "tagged" with the Conditional Tag of Europe, the flow tag A, and that the current paragraph is formatted with Body.

Conditional Tags are applied to text and the conditionally tagged text can be displayed or hidden; by hiding one condition and displaying another, you can create multiple versions of a document, and share content that appears in all versions.

In this example, a company creates three products that are identical except for the product name and distribution channels in each of three world markets, North America, Europe, and Asia. The remainder of the document is the same for all markets. Conditional text can be used to create a version of the document, one for each market that displays the correct name for the product

and the distribution channel through which users can obtain the product. The text that is different for each market is tagged with the appropriate conditional tag. To produce a document for North America, text that has been tagged for Europe and Asia is hidden, while leaving North American tagged text displayed.

11 Make `sg.using-formats.fm` active.

12 Press **Page Down** twice to go to page 14.

13 Near the middle of the page, put your insertion point anywhere in the table. FrameMaker uses Table Formats to control the appearance of tables.

14 From the Table menu, select **Table Designer**.
The Table Designer displays.

The format for the current table is indicated in the TableTag box
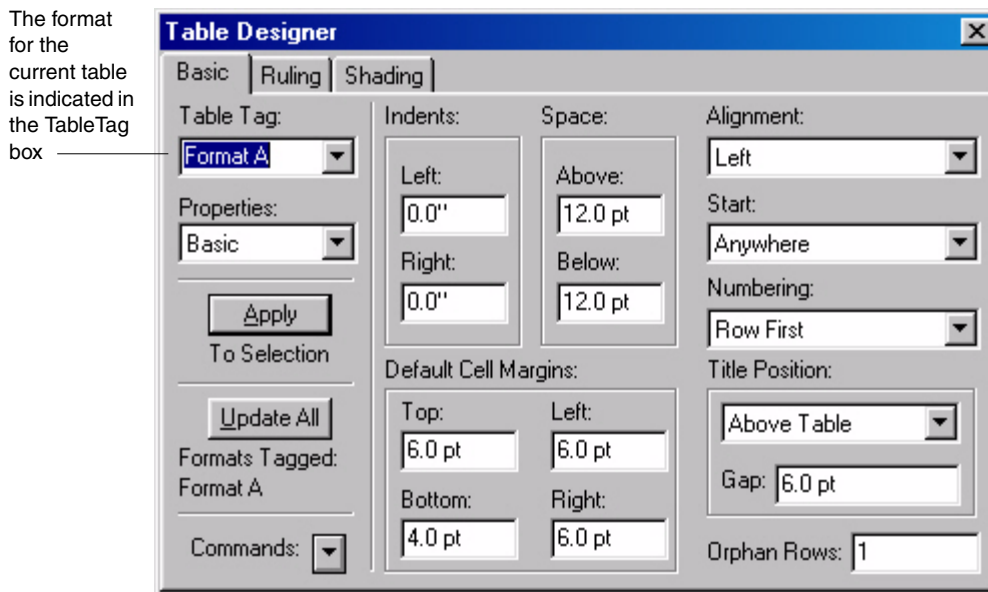
The Table Designer is used to create, maintain, and apply Table Formats.

The TableTag box indicates that the current table is formatted with Format A.

15 Close the Table Designer.

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16 In the table, double-click the text in the cell to the right of RevDate,
7/25/2003.

The Variable dialog box displays.

```
┌─────────────────────────────────────────────────┐
│ ════════════════  Variable  ════════════════     │
├─────────────────────────────────────────────────┤
│ Variables:                                        │
│ ┌─────────────────────────────────────────────┐  │
│ │ Paratag                                      │  │
│ │ PartNumber                                   │  │
│ │ pv01                                         │  │
│ │ pv02                                         │  │
│ │ RevDate                                      │  │
│ │ Thisis                                       │  │
│ │ Version                                    ▲ │  │
│ │ XRef                                       ▼ │  │
│ └─────────────────────────────────────────────┘  │
│ 7/25/2003                                         │
│                                                   │
│ [  Create Variable…  ]    [  Edit Definition…  ]  │
│                                                   │
│ [  Convert to Text…  ]    [     Update        ]   │
│                                                   │
│ [    Replace     ]        [     Cancel        ]   │
└─────────────────────────────────────────────────┘
```
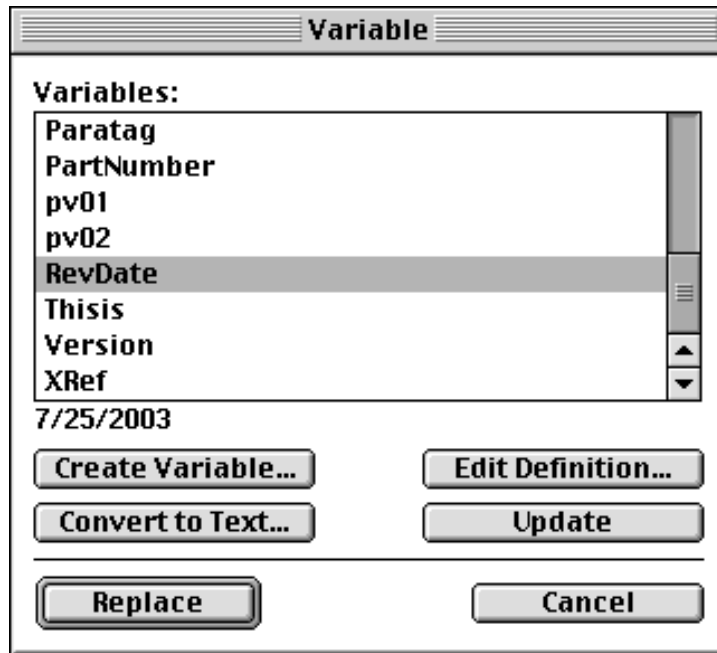
This is a FrameMaker Variable, not editable text.

Variables are used to name and format a string of text. The variable is stored in
one location and used in multiple locations. When the text needs to be
modified, it is modified in one place (the Variable dialog box), rather than
where it is used (in text). You'll learn more about variables in Chapter 5
Reducing Manual Text Entry on page 141.

17 Close the Variable dialog box by clicking **Cancel**.

18 Go to page 2-18.

19 In the table, in the last row, double-click the text in the second cell.

The entire block of text is selected and the Cross-Reference dialog box opens.

Source document for the Cross-Reference

Source Paragraph Tag for the Cross-Reference

Source Paragraph for the Cross-Reference

Format for the Cross-Reference
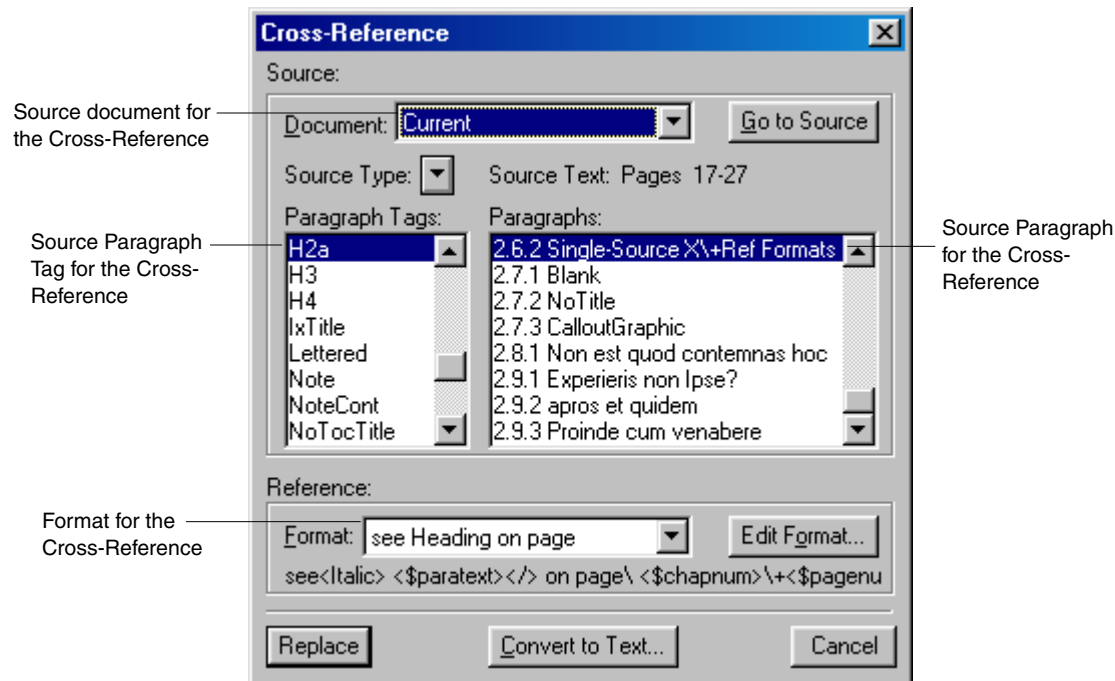
Variables and Cross-References cannot be edited like normal text. They use special dialog boxes to control their content and appearance.

20 Close the Cross-Reference dialog box by clicking **Cancel**.

21 Look in the Page Status area. What does the asterisk indicate?

The asterisk indicates that this document has unsaved changes.

22 From the File menu, select **Save**.

The asterisk in the Page Status area is removed.

23 From the File menu, select **Close**.

Exercise 8 **Opening and Working with a FrameMaker Book**

In this exercise, you'll learn about the Book window. The book window is an organizational tool that controls logically related FrameMaker files. A book treats multiple, separate physical files like one logical file.

1 From the File menu, select **Open**.

2 In the Open dialog box, select `../fm101/ch1/styleguide.book` (Macintosh: select Show All Files).

3 Click **Open**.

The styleguide.book window displays. You may need to resize the book window to display all the files shown below.

Icon for normal
FrameMaker
document

Icon for
generated file
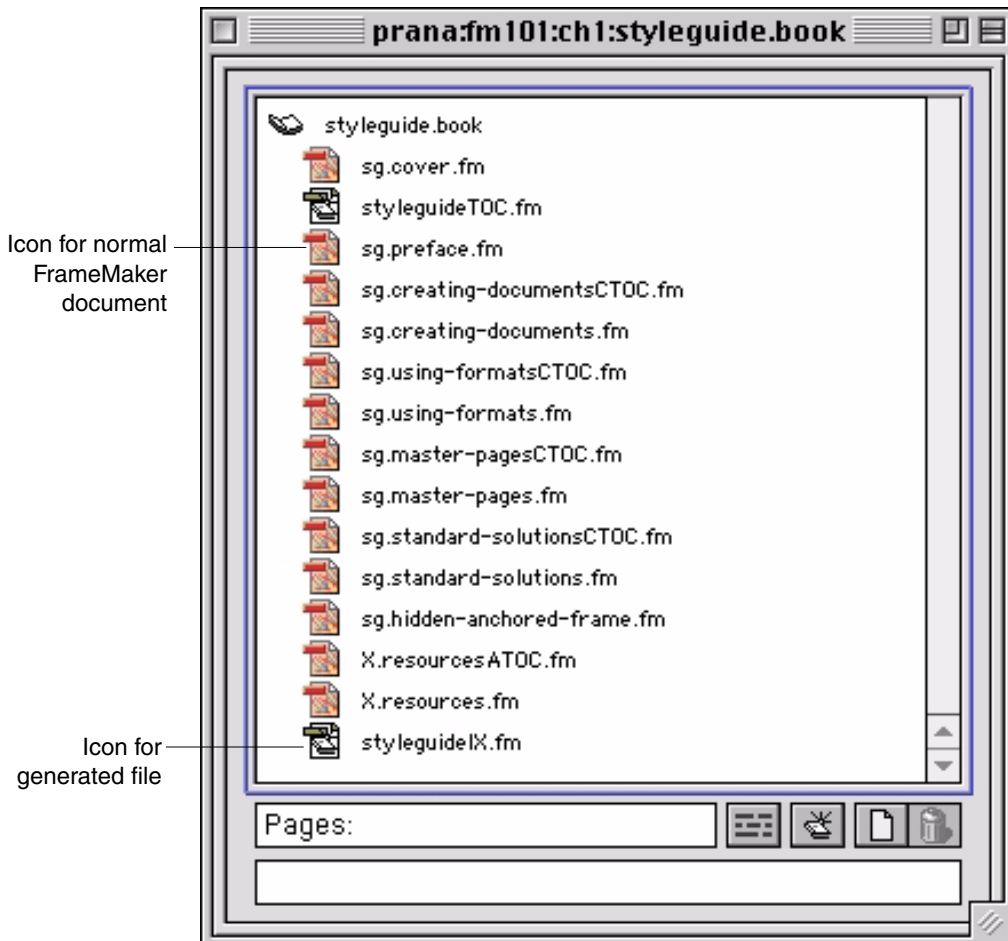
The book window contains all the FrameMaker files for the FrameMaker Book, styleguide.book.

You can also open files from the book window.

4 In the styleguide.book window, double-click sg.using-formats.fm. This is the same document you opened and closed in a previous exercise.

The file sg.using-formats.fm displays.

When FrameMaker files are assembled into a book, you can work with the separate files as if they are one file. This includes, spell-checking, finding and changing, and paging through the document.

5 Press **Page Up**.

An information box displays.

6 In the information box, click **Yes**.

The last page of the document preceding `sg.using-formats.fm` displays. This document is named `sg.using-formatsCTOC.fm`, which is a chapter-level table of contents or CTOC.

7 Notice that `sg.using-formatsCTOC.fm` displays at a different level of magnification.
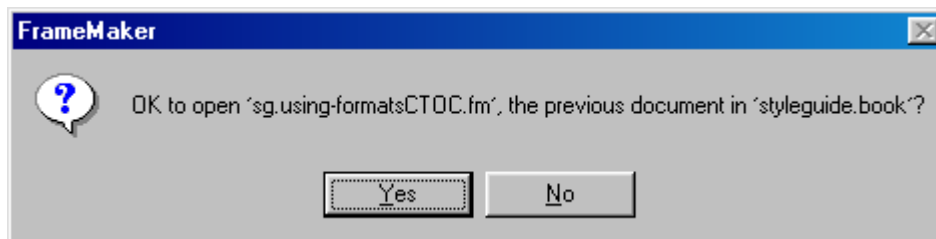
8 Zoom the window to 100% or 120% using one of the following methods: In the Zoom Controls area:

- Click the **160%** button and select 100% or 120%
- Click the small **z** button until the button to the right reads **100%** or **120%**

9 From the Zoom pop-up menu, select Fit Window to Page.

10 Move to the first page of `sg.using-formatsCTOC.fm` using the shortcut appropriate for your platform, shown below:

Platform	Shortcut
Macintosh	Press the Home key
UNIX	Press Shift-Page Up
Windows	Press Alt-Page Up

The layout of `sg.using-formatsCTOC.fm` is similar to the layout of the chapter.

11 Move to the last page of `sg.using-formatsCTOC.fm` using the appropriate shortcut.

Platform	Shortcut
Macintosh	Press the End key
UNIX	Press Shift-Page Down
Windows	Press Alt-Page Down

12 Press **Page Down** to display `sg.using-formats.fm`. (You may have to press it more than once depending on whether an entire page is displayed in the document window.)

Exercise 9 Setting Up Preferences and View Options

There are two types of options you can set for FrameMaker: preferences and view options. Preferences specify certain aspects of how FrameMaker works on your platform and view options specify the appearance of individual documents. An easy way to differentiate between the two settings is this:

- Preferences are specific to your computer
- View options are specific to each document

First, you'll learn some Preferences settings.

1 Make `sg.using-formats.fm` active. Open the Preferences dialog box for your platform using the appropriate menu selection shown below:

Macintosh and Windows	From the File menu, select **Preferences > General**
UNIX	From the File menu, select **Preferences**

The Preferences dialog box displays:
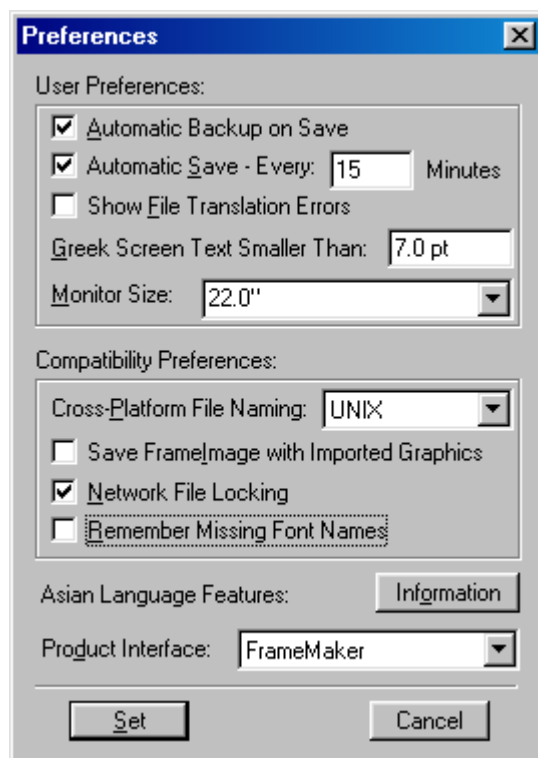
Windows Preferences

Note: For Macintosh versions of FrameMaker, Network File Locking is not available

Macintosh Preferences
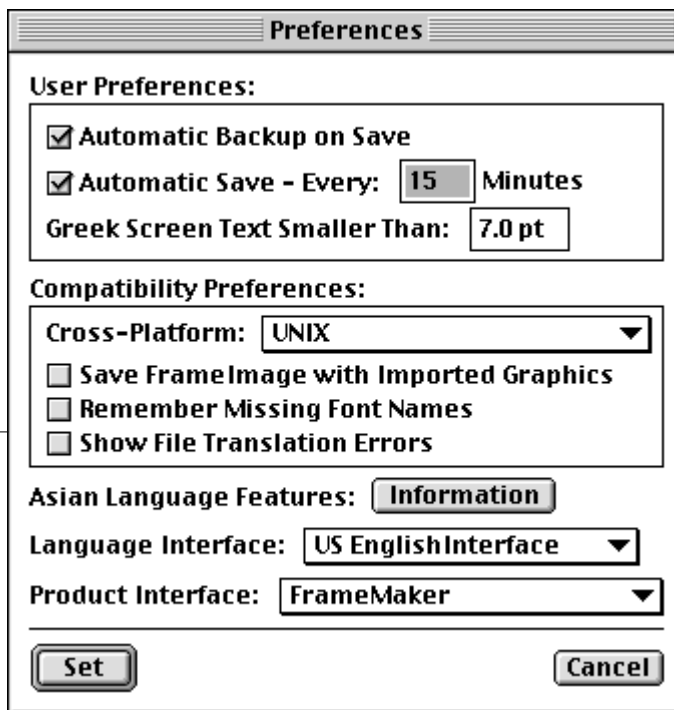
Note: For UNIX versions of FrameMaker, Network File Locking is automatically on and is not displayed in the Preferences dialog box

UNIX Preferences (SUN Solaris shown)

There are two essential preferences: Automatic Backup on Save and Automatic Save.

Automatic Backup files are created when you select the Automatic Backup
on Save option. A backup file is created the first time you save the file; the
backup file is unaffected by manual or automatic saves and is updated to match
the original file only when you quit FrameMaker. As long as you don't quit
FrameMaker, the backup file remains as it was before you started working.
Even if you close the document, the backup file is not altered. When you quit
FrameMaker, file, the two files are synchronized to have the same content.

If you made a change to a file then saved or closed the file, but later realized
that you didn't want the change, as long as you haven't quit the application,
you can open the backup file and go back to where you were when you started
the FrameMaker application.

2 Confirm that Automatic Backup on Save is selected.

Autosave files are created when you select the Automatic Save option. The
file is used when FrameMaker or the operating system crashes and either
no .recover file exists or the .recover file is not usable. Keep in mind
that the autosave file may not have whatever work you did between the last
time FrameMaker created or updated the autosave file and the time the system
or FrameMaker crashed.
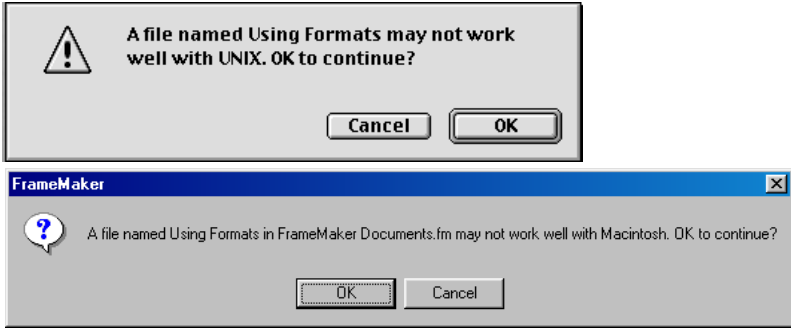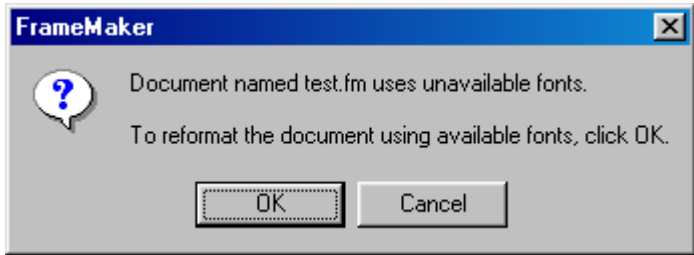
Note: Using the Revert to Saved feature will revert to the last manually saved version,
NOT the autosave.

3 Confirm that Automatic Save is selected. In the box to the right, type: 15
FrameMaker will automatically save your work every 15 minutes.

Note: By turning on Automatic Backup on Save and Automatic Save, you'll
see these files in the same directory as the original file.

Preference Setting	Notes	Filename
	The original file	file.fm
Automatic Backup on Save (on)	The backup filename	file.backup.fm
(Part of FrameMaker; not a preference)	The file created if FrameMaker crashes	file.recover.fm
Automatic Save (on)	The file created by Automatic Save	file.auto.fm
Network File Locking (on in Windows, by default in UNIX, not available in Macintosh)	The file created when Network File Locking is on and the file is open on desktop (or when operating system or FrameMaker crashes and doesn't clean up properly)	file.fm.lck

Other options and their suggested settings are shown below:

Option	Description	Setting
Cross-platform file naming (Mac: Compatibility Preferences > Cross-Platform)	Warns against using filenames that may not work with the platform you have chosen, as shown below:	UNIX
Save FrameImage with Imported Graphics (M+W)	Saves a bitmap of the graphic along with the graphic. If the file is opened on a platform that does not support the graphic's format, the bitmap FrameImage is displayed.	Off
Show File Translation Errors (Macintosh only)	Displays a window that lists how unavailable fonts are reformatted when the file is opened.	Off
Network File Locking	Prevents other users from opening a file that is already in use. This option is automatically on in UNIX. This option is not available in Macintosh; we recommend that you set up some kind of document management system to prevent inadvertent overwriting of files.	On (Windows only)
Remember Missing Font Names	When fonts used in a document are not available on the platform, checking this box will retain the original font name. If a document does contain unavailable fonts, the following warning dialog box is displayed:	On

4 When you have finished specifying options, click **Set**.

In previous steps, you set three view options for `sg.using-formats.fm`, borders, text symbols, and rulers, but that was for only one document. Other documents in the book do not have the same view options, as you experienced when you opened `sg.using-formatsCTOC.fm`.

5 From the book window, open `X.resources.fm`.

Depending on your platform, the document window may be minimized or too small to see any text.

6 Manually resize the document window using the method appropriate for your platform:

Platform	Method
Macintosh	Click the bottom right-corner (sometimes called the grow box) and drag it down and to the right
UNIX	Click and drag any of the four corners to resize the window
Windows	Click and drag any of the four corners or sides to resize the window

The document displays at an 80% zoom level.

7 From the book window, open `sg.master-pages.fm`.

The document displays but only part of the document is visible because the window is smaller than the document page. Also, in both `X.resources.fm` and `sg.master-pages.fm`, borders and text symbols are not turned on.

8 Set the View Options for all the documents in `styleguide.book`.

   a. Make the `styleguide.book` window active.

   b. Hold down **Shift** and from the File menu, select **Open All Files in Book**.

      All the files in `styleguide.book` are opened on the desktop.

   c. Make the `styleguide.book` window active.

    d. From the Edit menu, select **Select All > Files** to select all the files in the book.

       All the files in the book window are selected.
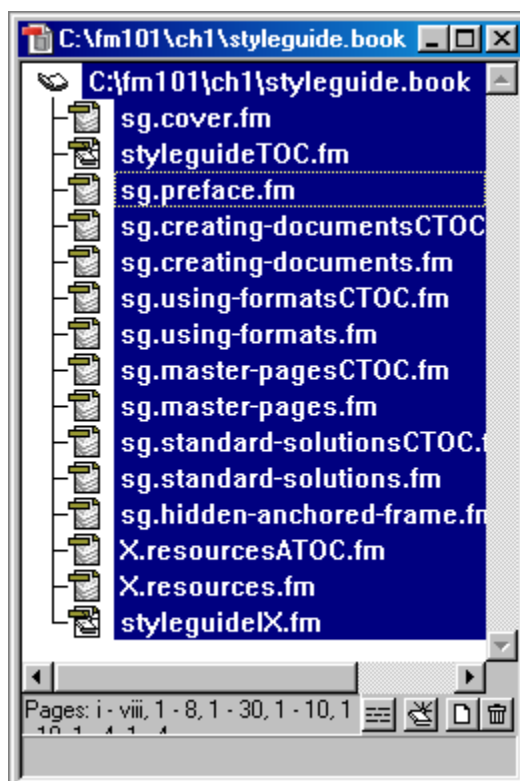
    e. From the View menu, select **Show Borders**.

    f. From the View menu, select **Show Text Symbols**.

    g. From the View menu, select **Show Rulers**.

    h. From the View menu, select **Hide Rulers**.

Explanation: The rulers were turned on in only one of the documents. To turn them off in all documents, first you select Shown Rulers to turn them on in all documents, and then Hide Rulers to turn them off in all documents.

    i. Zoom all documents in the book to your preferred setting. From the View menu, select **Zoom > 100%**. (To zoom to a higher setting, after you select **Zoom > 100%**, select **Zoom > In**.)

       This displays all the documents at the same zoom setting.

    j. From the View menu, select **Zoom > Fit Window to Page**.

       This sets each document window to be the same size as the document page.

Explanation: Fitting the document window to the page is especially important for Windows users because even though the application window and the document window(s) can be sized independently, the document window remains inside the application window. In Mac and UNIX versions, the document window(s) can be anywhere on the desktop.

9 With the book window active, hold down **Shift** and from the File menu, select **Save All Files in Book**.

The book's status bar displays the filename as it is saved.

10 With the book window still active, hold down **Shift** and from the File menu, select **Close All Files in Book**.

11 With the book window active, from the File menu, select **Close Book**.

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Practice Exercise

Use the following exercise to explore other View Options settings.

Exercise 10 Changing View Options

1 From the `../fm101/ch1` directory, open `view-opts.fm`.

2 With `view-opts.fm` active, from the View menu, choose **Options**.
The View Options dialog box displays.

Page Scrolling displays document pages by scrolling Horizontally, Vertically, or allowing the window size to determine which method is used. You can also display Facing Pages.

Display Units specifies all document measurements to be displayed as Metric (cm or mm), Inch, Pica, Point, Didot, or Cicero.

Font Units specifies the units for Font-related measurements (such as Font size, line spacing, and space above and below)

Grid Spacing specifies the invisible grid spacing. Used for quickly positioning objects.

Rotation specifies the smallest increment of rotation available when free rotating an object.
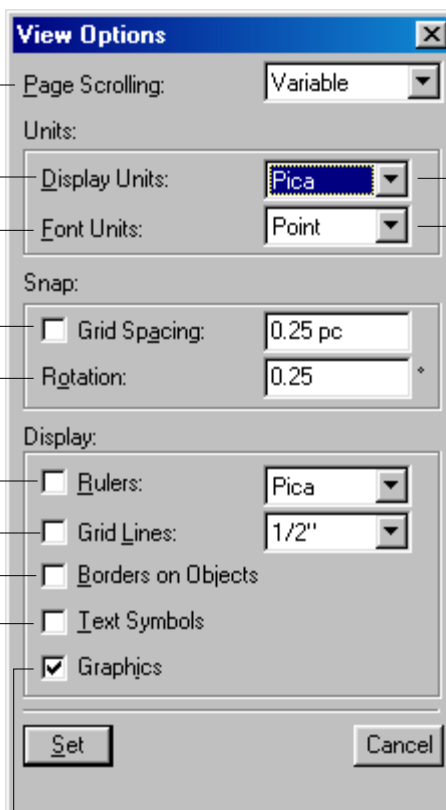
Turn on/off rulers display. The pop-up menu specifies the increments displayed on the ruler.

Turn on/off visible grid display. The pop-up menu specifies the increments of the grid lines.

Turn on/off object borders.

Turn on/off text symbols.

Variable is the most versatile

Inch is the most common setting

Point is recommend

Snap to grid can be turned on or off easily. This is used only for page layout or positioning graphics in an anchored frame

Rulers and grid lines are not needed during content creation, but borders and text symbols should be left on.

View Options

Page Scrolling:	Variable
Units:	
Display Units:	Pica
Font Units:	Point
Snap:	
☐ Grid Spacing:	0.25 pc
Rotation:	0.25 °
Display:	
☐ Rulers:	Pica
☐ Grid Lines:	1/2"
☐ Borders on Objects	
☐ Text Symbols	
☑ Graphics	

Set   Cancel

Turn on/off display of graphics in a document. Default is on. If you turn off graphics display, a blank area displays and graphics will not print. If you print a document that has missing graphics, a grey box displays but does not print.

3 From the Display Units pop-up menu, choose Inch.

This option sets the unit of measurement used in dialog boxes.

View Options

Page Scrolling:	Variable ▼
	cm
Units:	mm
	Inch
Display Units:	Pica
Font Units:	Point
	Didot
Snap:	Cicero
☑ Grid Spacing:	
Rotation:	0.25 °

Display:

☐ Rulers: Pica ▼

☐ Grid Lines: 1/2" ▼

☐ Borders on Objects

☐ Text Symbols

☑ Graphics

[Set]   [Cancel]
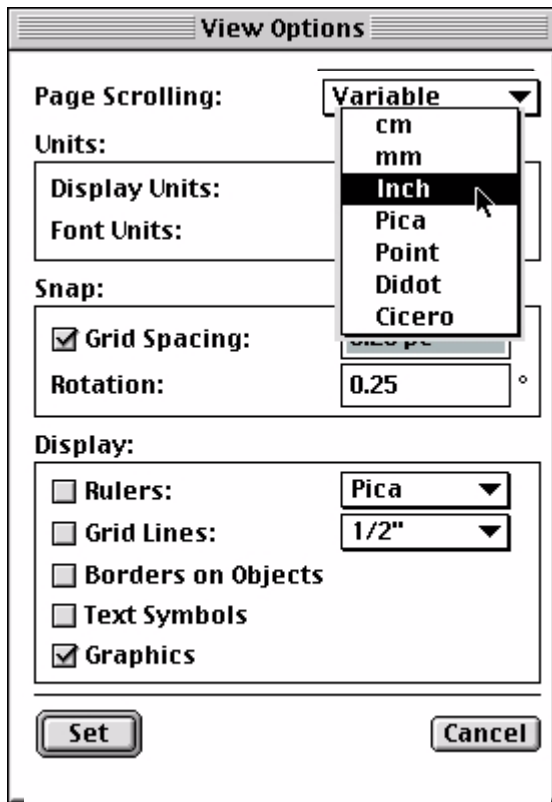
4 Leave the Font Units set to Point.

This option sets the display measurement of all line spacing settings, space above and below paragraphs, font size, and table cell margins to be Points. This means that you do not have to type in a measurement when you change the value for any of these settings.

5 Check (select) Grid Spacing and in the box to the right, delete pc.

This specifies the invisible snap grid to be 0.25 inch because you set Display Units to be Inch.

View Options

Page Scrolling:	Variable ▼

Units:

Display Units:	Inch ▼
Font Units:	Point ▼

Snap:

☑ Grid Spacing:	0.25
Rotation:	0.25 °

Display:

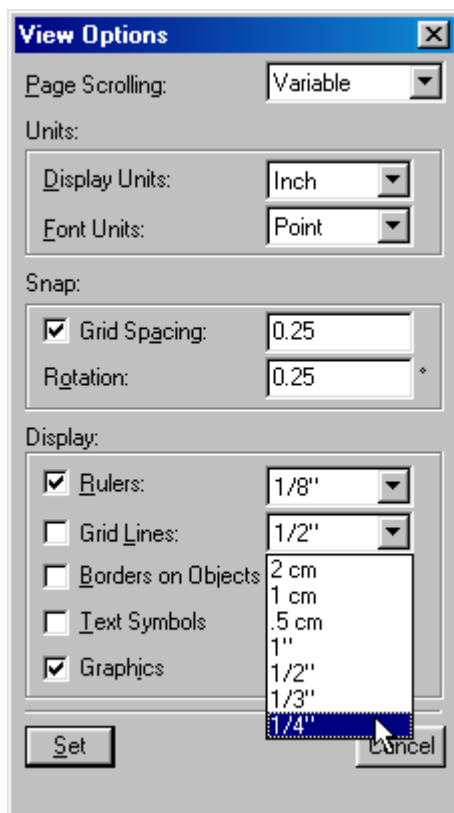| ☐ Rulers:	Pica ▼
☐ Grid Lines:	1/2" ▼
☐ Borders on Objects	
☐ Text Symbols	
☑ Graphics	

Set	Cancel
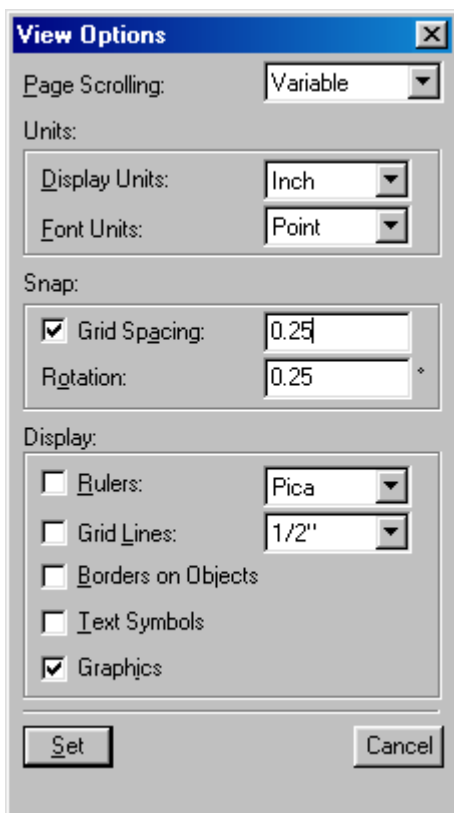
6 From the Rulers pop-up menu, choose **1/8"**.

This option specifies the ruler markings to display in 1/8 inch (0.125 inch) increments.
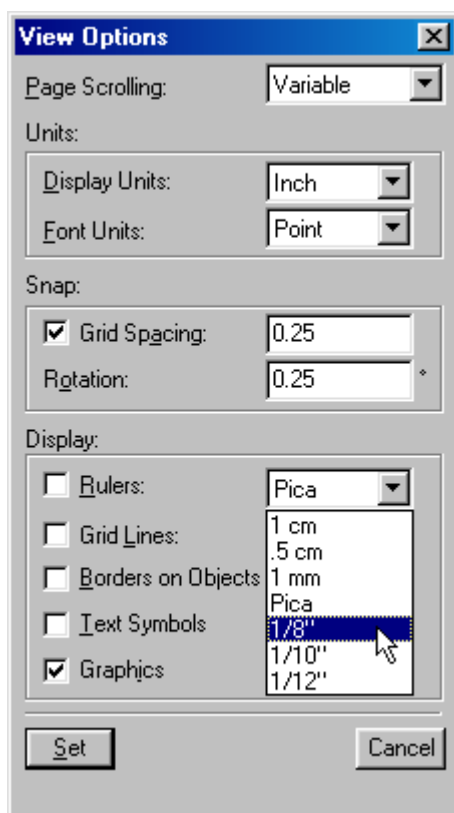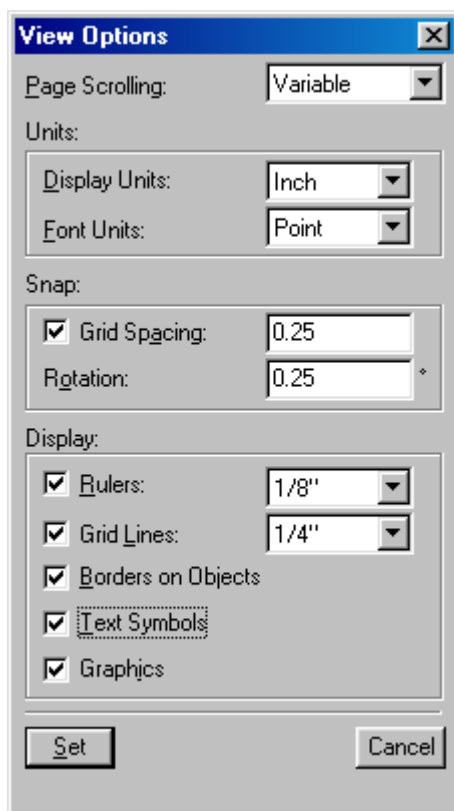

You can also display or hide the rulers from the View menu (**View > Rulers**) or by right-clicking (Mac: Control-clicking) with your cursor outside all text frames and selecting Rulers.

7 From the Grid Lines pop-up menu, choose **1/4"**.

This setting turns on a non-printing, visible grid with 1/4 inch (0.25 inch) spacing between lines.

View Options	✕
Page Scrolling:	Variable ▼
Units:	
Display Units:	Inch ▼
Font Units:	Point ▼
Snap:	
☑ Grid Spacing:	0.25
Rotation:	0.25 °
Display:	
☑ Rulers:	1/8" ▼
☐ Grid Lines:	1/2" ▼
☐ Borders on Objects	2 cm
	1 cm
	.5 cm
☐ Text Symbols	1"
	1/2"
☑ Graphics	1/3"
	1/4"
Set	Cancel

8 Check (select) Borders on Objects and Text Symbols.

The last two options can be set from the View menu (**View > Borders** and
View > Text Symbols) or by right-clicking (Mac: Control-clicking) with
your cursor outside all text frames and selecting Borders and Text Symbols.

9   Click **Set**.

The document rulers are visible with 1/8" increments, text symbols display, text frame and graphic borders display, and the grid lines display with 1/4" spacing. The next time you open a dialog box or window, the settings will display in inches, rather than in picas.

Note: All View Options settings are per document. Other documents are not affected by the settings in this document.

10   From the File menu, select **Close**.

A dialog box displays asking you if you want to save your changes before closing.

11   In the dialog box click **No** (Mac: click **Don't Save**).

Review Questions

Answer the following questions to review what you learned in this chapter.

1 How do you prevent the text frame borders from printing? How do you prevent the text symbols from printing?

2 When do you need rulers? How do you display them? How do you hide them?

3 How is FrameMaker different from text processing applications?

4 Name the following common text symbols:

Text Symbol	Description
⊥	
§	
¶	
〈	
〉	

5 Name some ways to display the first page of a document.

6 Name three ways to move to a specific page in a document.

7 What is the fastest way to open all the files in a FrameMaker book?

8 Look at the example shown below.

`Flow: A ¶: Body f: Bold`

What is it? What information does it tell you?

9 What is the name of the FrameMaker tool that allows you to organize many separate files and treat them like one file?

The answers to these questions are on page 339.